

The City of Calgary

# Financial Task Force Implementation Reports

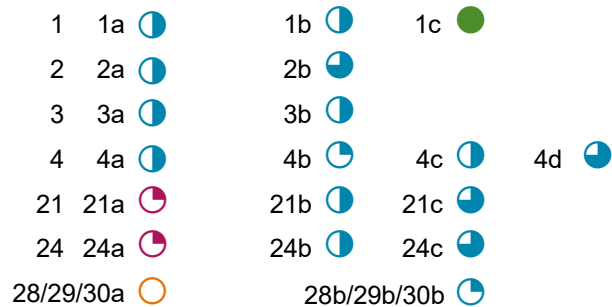
Chief Financial Officer's Department  
2021 December 07



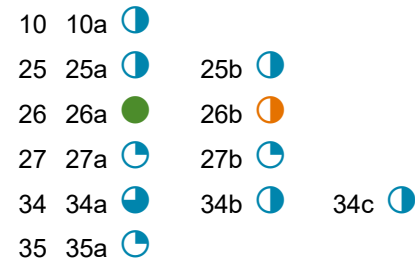
Administration is making progress on a number of 73 actions and 35 recommendations across the 8 Financial Task Force themes. The table provides an overview of progress (whether there is not yet any information to report, or if the associated work is in the planning, installation, implementation, or benefits realization phase) and status (whether the associated work has been **completed**, is **on schedule**, is **delayed**, or has been **cancelled**). Details on specific projects are contained in the Implementation Reports on the following pages.

Phase		Status
	Not reported	<b>Cancelled</b>
	Planning	<b>Delayed</b>
	Installation	<b>On schedule</b>
	Implementation	<b>Completed</b>
	Benefits Realization	

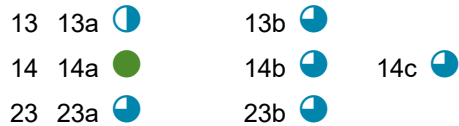
### Responding to Calgary's Cyclical Economy using Existing Tools



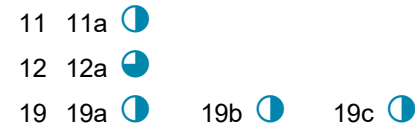
### Improving Tax Efficiency for Long-Term Fiscal Sustainability



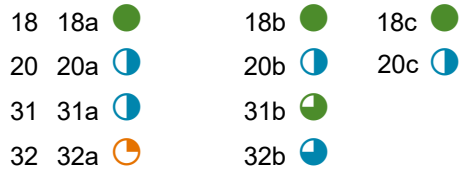
### Improving the Understanding of Municipal Finance Circumstances



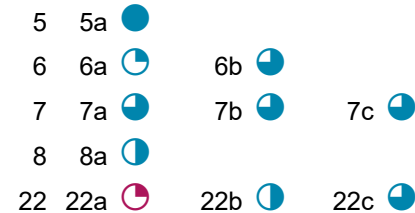
### Bringing Property Taxation into the Twenty-First Century



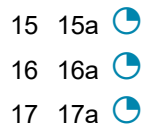
### Making Calgary More Competitive, Livable and Attractive



### Preparing for changes that would occur as the economy evolves



### Supporting Regional Economic Development




### Working Better with Partners in Achieving Progress



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Status indicators:  Completed  On schedule  Delayed  Cancelled

*Reports in italics were previously presented as complete in an earlier update report and are included at the end of this package for comprehensiveness, without any new, updated progress details.*



# Financial Task Force Implementation Report

## Assessment Smoothing Investigation

**Led By:** Property Assessment

**Related Administrative Action:** 35a

**Description:** Arising from FTF Recommendation #35, Administration was tasked with scoping a program along with required resources and present it to Council by the end of 2021.

The proposed plan is as follows:

- 1) Extract data required for analysis (complete).
- 2) Apply smoothing techniques per FTF (complete).
- 3) Research and analyze the results of the smoothing techniques and discuss in report (in progress). Include analysis of practices in other jurisdictions.
- 4) Make recommendation based on the above for or against further pursuing assessment smoothing techniques. If for, proceed with scoping a program for effecting the required changes (not yet complete).

<p><b>Implementation Phase:</b> Planning</p>	<p><b>What has happened over the past 6 months:</b> Previously extracted data for analysis has been restructured and simplified to succinctly convey the effects of various smoothing techniques and their impacts on property values and property taxes. Administration is currently creating data visualization tools to supplement the text for the final report of the investigation along with summary statistics for techniques.</p>
<p><b>Expected Implementation Date:</b> March 2022</p>	
<p><b>Current Status:</b> On schedule</p>	<p><b>What's next:</b> Complete and further research, demonstrate the effects of smoothing techniques, begin drafting the final report for the investigation and develop recommendations regarding assessment smoothing in the Calgary context.</p>
<p><b>Customers:</b> The City of Calgary Property Owners</p>	<p><b>Partners:</b> Financial Task Force Finance - Corporate Budget Office Finance - Tax &amp; Receivables</p>
<p><b>Overall Risk Rating:</b> Low</p>	<p><b>Strategic Alignment:</b> A well-run city</p>



# Financial Task Force Implementation Report

## Assessment Timeline

**Led By:** Property Assessment

**Related Administrative Action:** 4b, 27a, 27b

**Description:** Initial planning indicates that the proposed work to address administrative actions 4b, 27a, and 27b will potentially include efforts to:

- A. Move the assessment roll freeze earlier:
  - 2021 Freeze: December 11, 2020
  - 2022 Freeze: December 3, 2021
  - 2023 Freeze: November 17, 2022
- B. Deliver as much info as possible on the distribution of responsibility across classes
- C. Include impacts on a rate of tax rate decision on different classes and taxpayer groups at key times of the year
- D. Provide early tax shift information around preliminary roll timeframe (end of September)
- E. Affirm TSAWG recommendations requiring the same type of information for the indicative rate decision before the approved tax rate decision
- F. Seek legislative changes where necessary including regarding the December 31 property condition date
- G. Present information needed to make informed decisions in varied and more easily understandable formats

<b>Implementation Phase:</b> Planning	<b>What has happened over the past 6 months:</b> The 2022 Assessment Business and Detailed Operation Plans have been updated to reflect the 2022 November 17 roll freeze date. The modified plans have been reviewed by the section leaders. Risks and operational impacts have been documented and presented to the Assessment Management Team. Appropriate measures are being implemented to address potential operational impacts and to mitigate potential risks. Business unit engagement and operational planning is nearing completion.
<b>Expected Implementation Date:</b> December 2022	
<b>Current Status:</b> On schedule	<b>What's next:</b> Corporate and external stakeholder engagement will be commencing in 2021 November. Meetings will be scheduled with all identified stakeholders to discuss the earlier roll freeze date and potential impacts. Identified risks and potential opportunities will be explored. A communication strategy will be developed to encourage more property owners to participate in Assessments' "Pre-Roll" consultation period in advance of the earlier roll freeze date.

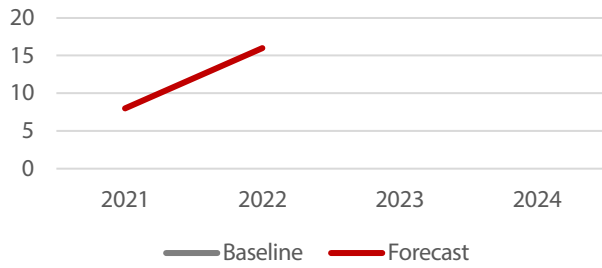
<b>Customers:</b> Property owners, City of Calgary, and Government of Alberta	<b>Partners:</b> Finance - Corporate Budget Office; Corporate Initiatives; Assessment
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<b>Overall Risk Rating:</b> Medium	<b>Strategic Alignment:</b> A well-run city
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Performance Measures	Performance Story																
<p>Per cent of the total annual assessment base maintained (per cent)</p> <table border="1"> <caption>Forecast Data for Performance Measure</caption> <thead> <tr> <th>Year</th> <th>Forecast (%)</th> </tr> </thead> <tbody> <tr><td>2018</td><td>90</td></tr> <tr><td>2019</td><td>88</td></tr> <tr><td>2020</td><td>90</td></tr> <tr><td>2021</td><td>92</td></tr> <tr><td>2022</td><td>93</td></tr> <tr><td>2023</td><td>94</td></tr> <tr><td>2024</td><td>95</td></tr> </tbody> </table>	Year	Forecast (%)	2018	90	2019	88	2020	90	2021	92	2022	93	2023	94	2024	95	<p>Changes to well-established critical path dates may impact assessment roll quality and customer service due to a significantly compressed timeline. The "per cent of the annual property assessment base maintained" is Assessment's flagship performance measure and is at the core of everything Assessment does. Recent results have been historically strong and have been drastically outperforming set targets but that trend may be difficult to continue if assessment roll quality and customer service are impacted by this shift.</p>
Year	Forecast (%)																
2018	90																
2019	88																
2020	90																
2021	92																
2022	93																
2023	94																
2024	95																

# Financial Task Force Implementation Report

Number of days assessment roll freeze advanced earlier in the year (per cent)



As directed by Council, Assessment will move the assessment roll freeze date earlier in the year starting in 2021 and finishing in 2022. This is being done to ensure that Council has the most accurate assessment data possible when they enter into budget deliberations.



# Financial Task Force Implementation Report

## Business Licensing Cost and Value

**Led By:** Business Licensing

**Related Administrative Action:** 28a, 28b, 29a, 29b, 30a, 30b

**Description:** The FTF Report included a summary scope of work and resource implications for involvement from Calgary Community Standards (CCS). Three of the recommendations place emphasis on quantifying the cost and value of services and distribution of benefits for CCS service lines (#28, #29, and #30).

This implementation proposal is specific to the administrative action items for the business licensing service line, including a cost study and value study to help quantify the distribution of benefits to residents and businesses. Following this work, administration will leverage results into recommendations for service optimization and future user fee pricing reviews.

<p><b>Implementation Phase:</b> Planning</p>	<p><b>What has happened over the past 6 months:</b></p> <ul style="list-style-type: none"> <li>- Final report has been reviewed with the FTF implementation team, with edits and feedback integrated.</li> </ul>
<p><b>Expected Implementation Date:</b> December 2022</p>	<ul style="list-style-type: none"> <li>- An additional recommendation was developed for business licensing service to evaluate the capacity for a bylaw review.</li> <li>- Work is underway to explore how the report can align with recommendation 21 and 22 (ongoing).</li> </ul>
<p><b>Current Status:</b> On schedule</p>	<p><b>What's next:</b></p> <ul style="list-style-type: none"> <li>- Continued work on seeking alignment with FTF recommendations 21 and 22.</li> <li>- Continued engagement with service line owner on next steps of planning, and preparing for installation.</li> </ul>

<p><b>Customers:</b></p> <ul style="list-style-type: none"> <li>•Business Owners</li> <li>•Citizens</li> <li>•Visitors (non-residents)</li> </ul>	<p><b>Partners:</b></p> <p>Internal</p> <ul style="list-style-type: none"> <li>•Calgary Community Services</li> <li>•Calgary Building Services</li> <li>•Financial Task Force implementation team</li> <li>•Calgary Fire Department</li> </ul> <p>External</p> <ul style="list-style-type: none"> <li>•Business Advisory Committee</li> <li>•Alberta Health Services (AHS)</li> <li>•Alberta Gaming, Liquor, and Cannabis (AGLC)</li> </ul>
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<p><b>Overall Risk Rating:</b> Low</p>	<p><b>Strategic Alignment:</b></p> <p>This project aligns with a number of citizen, council, corporate, and business unit goals:</p> <ul style="list-style-type: none"> <li>•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.</li> <li>•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.</li> <li>•2021 Corporate Goal: Support modernization of service delivery, optimization of investments, and financial sustainability at The City.</li> </ul>
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# Financial Task Force Implementation Report

## Business Perspectives Panel Research

**Led By:** Executive Leadership

**Related Administrative Action:** 5a

**Description:** Since 2017, The City has surveyed the business community quarterly through a Business Perspectives Panel, including follow-up discussions through randomly recruited business leader focus groups. The panel currently sits at approximately 800 business members across varied sectors and sizes of business.

Since 2019, The Business and Local Economy team has used the quarterly panel surveys and follow up focus group discussions to gain insights to inform strategies.

It also monitors four measures to support the success of the Business and Local Economy team’s initiatives:

- 1) Perceptions of being business friendly – Why/why not
- 2) City recognized as acting to be business friendly (or not acting)
- 3) Awareness of Calgary in the New Economy strategy
- 4) Perception of City communications with businesses

<b>Implementation Phase:</b> Benefits Realization	<b>What has happened over the past 6 months:</b> 2021 Q1 & Q2 survey of business leaders’ top issues, and their perceptions of City business communications, the City’s COVID response and business initiatives, the economy, downtown revitalization, and trust and reputation of The City. This was followed by qualitative in-depth interviews on the biggest issues facing business leaders and the business community. Results of this research showed that perceptions of the current economy saw an improvement while optimism for both the future of business performance and Calgary’s economy continued to improve since the end of 2019, implying a growing proportion of businesses are optimistic about the prospects emerging from the pandemic. Results also showed that while less than one-half of survey respondents are satisfied with The City of Calgary’s actions and policies to support businesses during the COVID-19 pandemic, the proportion of those who are satisfied has been increasing. And while less than half of respondents agree The City supports a business friendly environment in Calgary, this proportion has seen a steady increase since 2019.
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<b>Expected Implementation Date:</b> December 2021	
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<b>Current Status:</b> On schedule	<b>What’s next:</b> Analysis and reporting on Q3 & Q4 2021 panel survey waves, with a second round of in-depth follow up interviews to measure success, keep a pulse on the business community and help inform future strategies. Results from this most recent research will be available in mid-December and early January.
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<b>Customers:</b> Business and Local Economy team, and ultimately, the business community	<b>Partners:</b> Corporate Research Team (CSC) City Manager’s Office
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<b>Overall Risk Rating:</b> Low	<b>Strategic Alignment:</b> Business Sector Task Force alignment Calgary in the New Economy (Economic Strategy) Rethink to Thrive Strategy
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### Performance Story

Businesses perceptions of The City being business friendly is strongly connected to trust in Administration. Businesses trust in The City has doubled since the pandemic, showing that when we increased transparency and support for businesses, they heard our messages and trusted us more.





## Financial Task Force Implementation Report

We regularly measure businesses' awareness of City initiatives that support business to determine if information is permeating to the appropriate audiences, and what adjustments must be made if they aren't reaching the ears of business owners. During 2020, this measure was not taken and was instead replaced by awareness of COVID business supports during the pandemic, but it is noted the similar measures were the same.



# Financial Task Force Implementation Report

## Business Web Hub

**Led By:** Executive Leadership

**Related Administrative Action:** 5a

**Description:** The current business pages on calgary.ca create difficulties and inconsistent experiences for business users coming to The City for information and services in the following areas:

- Finding the content and service you want.
- Being informed about other content and services relevant to you as a business owner.
- Demonstrating value The City provides to business users.

This can lead to poor customer experiences business users have with The City.

This was originally raised as a gap at the Business Advisory Committee in 2019, but we lacked funding/resources to undertake it. We put an ask into Council, and they approved funding for us to do this work.

The new business hub design will incorporate new features and technology to the existing business pages and how they would be organized to improve overall customer experience business owners have with The City.

<p><b>Implementation Phase:</b> Benefits Realization</p>	<p><b>What has happened over the past 6 months:</b> Between June 28 - October 28, the Business Hub had 258,196 page views with a time spent/page higher than is average for most City of Calgary web pages. The highest traffic was in July and October. 71% of traffic is coming from organic web searches, as opposed to coming from a specific url or links, and 45.5% of those were new visitors to calgary.ca. The pages with the highest views are Business Licensing and Starting a Business.</p> <p>www.calgary.ca/business was the ideal place to launch the Calgary Reopening Grant (July 2021) and the REP Business Support Grant (October 2021). It is also a great way to link to other City of Calgary initiatives such as the Face Coverings Bylaw and the REP Exemption Bylaw.</p>
<p><b>Expected Implementation Date:</b> April 2021</p>	

<p><b>Current Status:</b> Completed</p>	<p><b>What's next:</b> We will continue monitoring web traffic and identifying opportunities to use calgary.ca/business for new initiatives.</p>
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<p><b>Customers:</b></p> <ul style="list-style-type: none"> <li>-Business owners, managers and employees</li> <li>-Business Improvement Areas (BIAs)</li> <li>-Business Sector Task Force</li> <li>-Calgarians who support local business</li> </ul>	<p><b>Partners:</b></p> <ul style="list-style-type: none"> <li>-Customer Service and Communications</li> <li>-Calgary Emergency Management Agency</li> <li>-Calgary Community Standards</li> <li>-Planning &amp; Development (primarily Calgary Building Services)</li> <li>-Roads</li> <li>-Transportation Infrastructure</li> <li>-Green Line</li> <li>-Calgary Neighbourhoods (primarily Meghan Mahoney)</li> <li>-Information Technology</li> <li>-Finance</li> <li>-Assessment</li> <li>-Waste and Recycling</li> <li>-Mayor's Office</li> <li>-City Council members</li> </ul>
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<p><b>Overall Risk Rating:</b> Medium</p>	<p><b>Strategic Alignment:</b></p> <ul style="list-style-type: none"> <li>-Business Advisory Committee (highlighted as a gap by Councilors chairing committee and reinforced by industry on committee).</li> <li>-Rethink to Thrive Strategy (improved information to businesses and two-way communication with them)</li> </ul>
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<p><b>Performance Measures</b></p>	<p><b>Performance Story</b></p>
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## Financial Task Force Implementation Report

	<p>Based on quarterly surveys of a sample of Calgary’s business community via the Business Perspectives Panel, the measure of satisfaction on the question, “I have enough information about support available from The City to businesses” increases post launch of the hub.</p>
	<p>Post launch, web traffic to the online hub is high, and visits supersede corporate benchmarks for other page and microsite launches. Moving beyond the launch, the traffic to the hub (visits to various pages within the hub) remains steady and relatively high for most of the content.</p>



# Financial Task Force Implementation Report

## Corporate eCommerce Program

**Led By:** Data Analytics & Information Access

**Related Administrative Action:** 7a, 7b

**Description:** Leveraging the One Calgary capital budget, Corporate Analytics & Innovation, working alongside partners in Customer Service & Communication and Information Technology, is bringing in a standard Corporate technology solution for eCommerce.

In response to Task Force recommendations 7a and 7b, the Corporate eCommerce Program will bring in a standard technology offering to provide:

- 1) Consistent and improved user experience – to support ease of Calgarians and businesses transacting with The City.
- 2) Potential financial savings – from reduction in discrete software solutions.
- 3) Operational efficiencies – from utilization of a standard technology offering.

The solution will first replace City Online (2020 revenues = ~\$2.4M). A concurrent SAVE business case is also being implemented in 2021 which will use the software solution to increase revenues via City Online to an estimated ~\$3.4M in 2021 and then to a total of ~\$4.4M in 2022, and every subsequent year thereafter.

Through the Corporate eCommerce Program, a new technology solution will be implemented, City Online will be replaced and a high-level roadmap for other possible services to utilize the Corporate tool will be developed.

<p><b>Implementation Phase:</b> Implementation</p>	<p><b>What has happened over the past 6 months:</b> The City is working closely with the vendor on a two-phased project. The completed first phase included requirement gathering, solution modelling, installation of the solution software in The City environment and a proof-of concept.</p>
<p><b>Expected Implementation Date:</b> March 2022</p>	<p>A concurrent SAVE business case was implemented on July 1, 2021 which is related to products made available through City Online.</p>

<p><b>Current Status:</b> On schedule</p>	<p><b>What's next:</b> Now in the second phase, the project team is building out the rest of the Corporate eCommerce solution, and the replacement of City Online.</p>
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<p><b>Customers:</b> Calgarians and businesses who transact with The City</p>	<p><b>Partners:</b> Corporate Analytics &amp; Innovation, Customer Services &amp; Communication and Information Technology</p>
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<p><b>Overall Risk Rating:</b> Medium</p>	<p><b>Strategic Alignment:</b> Digital Strategy, Digital Governance Committee, SAVE</p>
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Performance Measures	Performance Story																								
<p>Revenue through Corporate eCommerce tool (\$M)</p> <table border="1"> <caption>Revenue through Corporate eCommerce tool (\$M)</caption> <thead> <tr> <th>Year</th> <th>Baseline (\$M)</th> <th>Forecast (\$M)</th> </tr> </thead> <tbody> <tr> <td>2018</td> <td>2.4</td> <td>-</td> </tr> <tr> <td>2019</td> <td>2.4</td> <td>-</td> </tr> <tr> <td>2020</td> <td>2.4</td> <td>2.4</td> </tr> <tr> <td>2021</td> <td>2.4</td> <td>3.4</td> </tr> <tr> <td>2022</td> <td>2.4</td> <td>4.4</td> </tr> <tr> <td>2023</td> <td>2.4</td> <td>4.4</td> </tr> <tr> <td>2024</td> <td>2.4</td> <td>4.4</td> </tr> </tbody> </table>	Year	Baseline (\$M)	Forecast (\$M)	2018	2.4	-	2019	2.4	-	2020	2.4	2.4	2021	2.4	3.4	2022	2.4	4.4	2023	2.4	4.4	2024	2.4	4.4	<p>It is anticipated that current and future revenues through a standard technology tool and replacement of City Online will increase with a more user-friendly tool. The developed roadmap for the inclusion of future products and/or services will provide a better clarity of future possible revenue potential when, and if, future services leverage the Corporate technology solution.</p>
Year	Baseline (\$M)	Forecast (\$M)																							
2018	2.4	-																							
2019	2.4	-																							
2020	2.4	2.4																							
2021	2.4	3.4																							
2022	2.4	4.4																							
2023	2.4	4.4																							
2024	2.4	4.4																							



# Financial Task Force Implementation Report

## Council-approved Budget Principles

**Led By:** Financial Support

**Related Administrative Action:** 2a, 11a, 20a, 31a, 8a

**Description:** This proposal would create a more permanent set of principles around service planning and budgeting, including principles for setting tax rates. These principles would be approved by Council through amendment to the Multi-Year Business Planning and Budgeting Policy (CFO0004).

The principles should be approved in 2022, prior to the beginning of the next four-year business planning and budgeting cycle (2023-2026).

In response to Task Force recommendations 20 and 31, the development of principles will include stability and predictability of taxes as a specific consideration. The development of principles will also consider the economic strategy Calgary in the New Economy in response to recommendation 8.

<p><b>Implementation Phase:</b> Installation</p>	<p><b>What has happened over the past 6 months:</b> The Executive Leadership Team (ELT) has approved the 2023-2026 Service Plans and Budgets program plan, which included an attachment describing the Council-approved Budget Principles and their implications on the program. ELT directed that these be explicitly included in Administrations Results for the program. Further development of the program plan details has included consideration of these principles and how they can be applied.</p>
<p><b>Expected Implementation Date:</b> December 2021</p>	
<p><b>Current Status:</b> On schedule</p>	<p><b>What's next:</b> Revised Administration Results, including the Budget Principles, will be provided to ELT in December 2021 for entry into the formal record. Formal launch of the 2023-2026 Service Plans and Budgets activities is planned, and the Budget Principles will inform the guidance to services as they develop their plans and budgets. These principles will also be included in the next update to the Multi-Year Business Planning and Budgeting Policy, which is anticipated to occur in the first part of the 2023-2026 plan.</p>
<p><b>Customers:</b> Council, the public, Administration planning and budgeting stakeholders</p>	<p><b>Partners:</b> Corporate Budget Office; Corporate Initiatives</p>
<p><b>Overall Risk Rating:</b> Low</p>	<p><b>Strategic Alignment:</b> Multi-Year Business Planning and Budgeting Policy;</p>



# Financial Task Force Implementation Report

## Countercyclical Fiscal Policy Report

<b>Led By:</b> Financial Support	
<b>Related Administrative Action:</b> 32a	
<p><b>Description:</b> Administration will prepare a report that details the options available to The City to employ counter-cyclical policy and identify optimal counter-cyclical policies. The report will be realistic about the options for The City given the limited fiscal capacity of The City when compared to other levels of government.</p>	
<p><b>Implementation Phase:</b> Planning</p> <p><b>Expected Implementation Date:</b> March 2022</p>	<p><b>What has happened over the past 6 months:</b> After reviewing municipal finance related administration actions, Corporate Economics decided to deliver the report in two parts explaining: Part 1. The options available to The City to employ counter-cyclical policies. Part 2. The challenges for municipalities in providing counter-cyclical policies compared to the other levels of government. The new changes we need for funding municipal level counter-cyclical fiscal policies, including new revenue sources from the traditional brick &amp; mortar business models and the digital economy, and potential changes in balanced budgeting practices.</p>
<p><b>Current Status:</b> On schedule</p>	<p><b>What's next:</b> Part 1 report will be finished by the end of 2021. Part 2 report will be in the Chapters of the Municipal Finance White Paper Corporate Economics is doing. It will be finished by Q1, 2022.</p>
<p><b>Customers:</b> Council, Public</p>	<p><b>Partners:</b> N/A</p>
<p><b>Overall Risk Rating:</b> Low</p>	<p><b>Strategic Alignment:</b> Long-range Financial Plan</p>

## Differentiated Taxation

Led By: Property Assessment

Related Administrative Action: 6a

**Description:** Recommendation 6 is “consider differentiated taxation for businesses and organizations that make significant contributions to the character and fabric of the city. It would include

- Organizations like BIAs
- Non-profit organizations
- Owner-operated small businesses with limited financial means”

Administrative action 6a is “administration will continue to examine the best ways to apply available tools.”

Proposed Plan:

- 1) Summarize the existing tools of “differentiated taxation” per FTF recommendation #6 that are currently being administered and/or that have been explored and purposefully not administered by The City.
- 2) Review the legislation for additional, existing legislative tools not already administered and/or explored by The City.
- 3) Assess if the tools identified in Step 2 would be reasonable to implement, and if Administration feels it is so, provide a business case for proceeding using the following non-exhaustive criteria: The City’s objectives in implementing such tools, the capacity for the tools to achieve those objectives (e.g. will they reach the intended beneficiary, etc.); estimated costs vs estimated benefits (financial and non-financial); risks associated with implementing the tools and planned mitigation measures.
- 4) Assess if the current tools identified in Step 1 require improvement to better achieve their objectives, and if so, provide a business case explaining the reasons for the change based on the same or similar criteria as per the business case in Step 3.

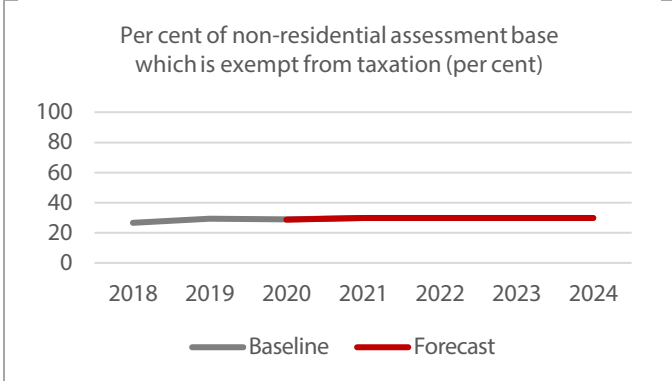
<b>Implementation Phase:</b> Planning	<b>What has happened over the past 6 months:</b> Engaged with internal stakeholders to identify potential categories of organizations where differentiated taxation may support City objectives. Administration is currently developing and extracting data sets to assess the feasibility and impact of differentiated taxation.
<b>Expected Implementation Date:</b> June 2022	

<b>Current Status:</b> On schedule	<b>What’s next:</b> Conduct further research, identify potential targets for differentiated taxation, begin drafting report and make recommendations regarding differentiated taxation for defined groups.
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<b>Customers:</b> Property owners, City of Calgary, and Government of Alberta	<b>Partners:</b> Finance - Tax & Receivables
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<b>Overall Risk Rating:</b> Slight	<b>Strategic Alignment:</b> A well-run city A prosperous city
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Performance Measures	Performance Story
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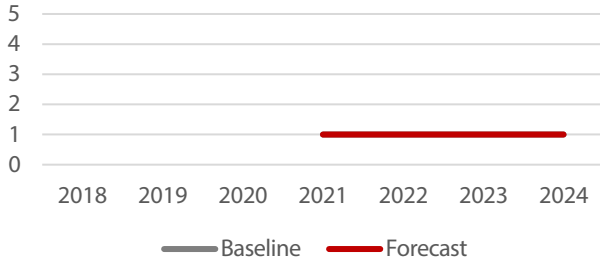


The greater the percentage of the overall assessment base which is considered exempt for taxation means there are fewer properties contributing to the property tax base that is used to provide the important tax supported products and services that The City of Calgary provides every year. This measure has been trending upward.



# Financial Task Force Implementation Report

Number of available tools implemented and/or tools newly created via advocacy (number)



The intent of this newly created performance measure is to provide an incentive to push for new tools and to push for the use of the tools which have already been provided to address Recommendation 6.





# Financial Task Force Implementation Report

## Downtown Survey

Led By: City Planning & Policy

Related Administrative Action: 33b

**Description:**

- There are currently a series of 10 downtown specific questions that are asked of The City of Calgary Corporate Research Business Panel periodically
- The Business Panel is comprised of 800 decision-makers in small, medium and large-sized businesses throughout Calgary.
- This research is currently conducted and already budgeted for at The City; however, is likely not comprehensive enough to fulfill Recommendation 33B. It is, however, an excellent indicator of what could and should be asked of businesses should a net new survey be undertaken.
- Currently, there has only been data collected from the wider business community. This survey will seek to gather insights directly from the demographic of businesses that have relocated from the downtown core to suburban areas. This will provide a greater understanding of this trend, which will lead to better policy making to revert it. This information will help realize both the Downtown Strategy and FTF's ambition to understand and action their recommendations to assist in the City's economic recovery and financial resilience.

<p><b>Implementation Phase:</b> Planning</p>	<p><b>What has happened over the past 6 months:</b> Continued to leverage data, findings, and insights from the Corporate Research Business Panel. Focused on maximizing existing tools and minimizing research costs. Intelligence and data on the business community and downtown may be really helpful for Council decision making in the future.</p>
<p><b>Expected Implementation Date:</b> October 2022</p>	

<p><b>Current Status:</b> On schedule</p>	<p><b>What's next:</b> Continue to work with Corporate Research, Corporate Analytics &amp; Innovation, Calgary Economic Development, Calgary Chamber of Commerce, BIAs, and the Business &amp; Local Economy team to leverage surveys, research, and data.</p> <p>Look at potential net new costs to potentially develop a specific survey/research to address the targeted questions. This is unbudgeted and a net new addition for survey and research costs.</p>
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<p><b>Customers:</b></p> <ul style="list-style-type: none"> <li>• Planning &amp; Development</li> <li>• Downtown Strategy</li> <li>• Business &amp; Local Economy</li> <li>• Downtown Business Community and Associated BIAs</li> <li>• Calgary Economic Development</li> </ul>	<p><b>Partners:</b></p> <p>Internal</p> <ul style="list-style-type: none"> <li>• Corporate Research</li> <li>• Financial Task Force (Implementation)</li> <li>• Downtown Strategy</li> <li>• Corporate Analytics &amp; Innovation, Innovation Lab</li> </ul> <p>External</p> <ul style="list-style-type: none"> <li>• External Vendor for survey development and delivery</li> <li>• Calgary Economic Development</li> </ul>
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<p><b>Overall Risk Rating:</b> Low</p>	<p><b>Strategic Alignment:</b> Financial Task Force (Implementation) Downtown Strategy Business &amp; Local Economy</p>
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# Financial Task Force Implementation Report

## Economic Resilience Task Force (ERTF) Liaison

**Led By:** Financial Support

**Related Administrative Action:** 21a, 22a, 24a

**Description:** The Financial Task Force Implementation Team will coordinate with those bringing revenue related items through task force implementation processes to ensure that the Economic Resilience Task Force is aware and can provide feedback on the plans.

<p><b>Implementation Phase:</b> Planning</p>	<p><b>What has happened over the past 6 months:</b> The Economic Resilience Task Force wound up its activities and the initiatives that were under way have been continued by Administration.</p>
<p><b>Expected Implementation Date:</b> May 2021</p>	
<p><b>Current Status:</b> Cancelled</p>	<p><b>What's next:</b> With the winding up of the Economic Resilience Task Force, it is no longer possible to solicit further input from the group. There are still, however, external members on the Financial Task Force Steering Committee and other survey/engagement opportunities on a case by case basis.</p>
<p><b>Customers:</b> Economic Resilience Task Force</p>	<p><b>Partners:</b> External Economic Resilience Task Force  Internal Services / BUs seeking or currently employing revenue mechanisms other than the property tax.</p>
<p><b>Overall Risk Rating:</b> Low</p>	<p><b>Strategic Alignment:</b> User Fee &amp; Subsidies Policy</p>



# Financial Task Force Implementation Report

## Fabrication Workshop

**Led By:** Fleet Management

**Related Administrative Action:** 21b

**Description:** This proposal would expand Fleet Management’s Fabrication Workshop’s compliment of staff by 6.0 FTEs to design and manufacture fabricated items for external municipalities. The proposal includes 1.0 FTE to project manage the work and support marketing along with 5.0 FTEs for journeyman welders.

ELT has approved Fleet Management’s business case to hire for these positions.

Corporate prioritization and lack of resourcing forces Fleet Management to often turn away requests from external municipalities and organizations. This proposal will allow Fleet Management to complete these external requests and increase its revenue beyond the \$8-9 million each year. Fleet Management has committed to generating an additional \$.5 million in revenue in year one and \$1.0 million in year two. This revenue would then be captured into a Budget Savings Account as an annual “royalty”. As Fleet Management’s budget is net neutral, these positions are self-funded.

<b>Implementation Phase:</b> Installation	<b>What has happened over the past 6 months:</b> Fleet Services completed the hiring of the foreman and team lead positions and collaborated with Labour Relations, Human Resources, and union representatives to create a new shift in the Fabrication Workshop.
<b>Expected Implementation Date:</b> January 2022	
<b>Current Status:</b> On schedule	<b>What’s next:</b> Fleet Services, in collaboration with Customer Service & Communications, will develop and implement a strategy based on market research for external customers. Fleet Services will begin onboarding new fabrication requests in Q1 2022. In the interim, Fleet Services will utilize the new Fabrication Workshop shift to respond to internal requests while transitioning to the Implementation Phase. This will enhance customer service and turnaround times for internal requests. Fleet Services is on schedule to complete the Installation Phase by end of Q4 2021.

<b>Customers:</b> External municipalities and organizations	<b>Partners:</b> Corporate Budget Office; Strategic Marketing and Communications; Procurement and Warehousing;
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<b>Overall Risk Rating:</b> Medium	<b>Strategic Alignment:</b> A well-run city
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Performance Measures	Performance Story																								
<table border="1"> <caption>Fabrication Workshop Revenue (\$000s)</caption> <thead> <tr> <th>Year</th> <th>Baseline</th> <th>Forecast</th> </tr> </thead> <tbody> <tr> <td>2018</td> <td>8,200</td> <td>8,200</td> </tr> <tr> <td>2019</td> <td>9,200</td> <td>9,200</td> </tr> <tr> <td>2020</td> <td>9,800</td> <td>9,800</td> </tr> <tr> <td>2021</td> <td>9,800</td> <td>9,500</td> </tr> <tr> <td>2022</td> <td>9,800</td> <td>10,500</td> </tr> <tr> <td>2023</td> <td>9,800</td> <td>10,500</td> </tr> <tr> <td>2024</td> <td>9,800</td> <td>10,500</td> </tr> </tbody> </table>	Year	Baseline	Forecast	2018	8,200	8,200	2019	9,200	9,200	2020	9,800	9,800	2021	9,800	9,500	2022	9,800	10,500	2023	9,800	10,500	2024	9,800	10,500	Fabrication Workshop Revenue was \$9.8 million in 2020, up from \$9.2 million in 2019. This proposal will add a second shift to the Fabrication Workshop and start marketing its products to external municipalities and organizations resulting in a forecasted revenue of \$10.5 million and \$11 million in 2021 and 2022, respectively.
Year	Baseline	Forecast																							
2018	8,200	8,200																							
2019	9,200	9,200																							
2020	9,800	9,800																							
2021	9,800	9,500																							
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2023	9,800	10,500																							
2024	9,800	10,500																							



# Financial Task Force Implementation Report

## Financial Narrative

**Led By:** Strategic Marketing & Communications

**Related Administrative Action:** 2b, 23a, 34a

**Description:** The Financial Narrative will create a cohesive narrative connecting The City’s annual financial cycle initiatives (Planning & Budgeting, Assessment, and Taxes). In addition the narrative will include elements of service value, citizen opportunities and other information inputs, and continuous financial and process improvement initiatives. This will help to demonstrate value and create awareness and understanding of The City’s annual financial cycle.

<p><b>Implementation Phase:</b> Implementation</p>	<p><b>What has happened over the past 6 months:</b></p> <ol style="list-style-type: none"> <li>1. Financial Narrative web presence - ongoing updating at <a href="http://www.calgary.ca/ourfinances">www.calgary.ca/ourfinances</a> - including ongoing updates to Financial Facts page.</li> <li>2. Developed a municipal benchmarking subsite from the Financial narrative to give some context as to how Calgary is doing compared to others. <a href="https://www.calgary.ca/ca/city-manager/our-finances/financial-facts/compare-municipalities.html">https://www.calgary.ca/ca/city-manager/our-finances/financial-facts/compare-municipalities.html</a></li> <li>3. Completed more videos as part of FN Video series (service value, planning and budgeting)</li> <li>4. Ran tax collection campaign (including media and social media buys).</li> <li>5. Ran Assessment Pre-roll process (online support for property owners).</li> <li>6. Promotion of Assessment e-Notice program.</li> <li>7. Ongoing maintenance of the Financial Narrative toolbox for Council and Sr. Leadership (weekly updates)</li> </ol>
<p><b>Expected Implementation Date:</b> November 2022</p>	
<p><b>Current Status:</b> On schedule</p>	<p><b>What’s next:</b></p> <p>Q4 2021 - Progress Planned for Next Period</p> <ol style="list-style-type: none"> <li>1. Budget Adjustments campaign and communications.</li> <li>2. Citizen Satisfaction Survey rollout support</li> <li>3. TIPP promotion campaign</li> <li>4. Ongoing maintenance of website and FN toolbox on Teams</li> <li>5. Assessment Roll and Customer Review Period preparation (starts Jan.)</li> </ol>
<p><b>Customers:</b> Citizens, Businesses, Employees, Council, Media, and Non-Calgarians.</p>	<p><b>Partners:</b> Financial Task Force; Intergovernmental and Corporate Strategy; Departments for service value.</p>
<p><b>Overall Risk Rating:</b> Medium</p>	<p><b>Strategic Alignment:</b></p> <ol style="list-style-type: none"> <li>1. Planning and Budgeting</li> <li>2. Assessment</li> <li>3. Tax collection</li> </ol>



# Financial Task Force Implementation Report

## Long Range Financial Plan Update

**Led By:** Financial Support

**Related Administrative Action:** 1b, 20b, 3a, 10a, 24b

**Description:** The update to the Long Range Financial Plan currently underway explicitly incorporates: a broader view of the impact of City finances on the economy (1b), including a review of the validity and generalizations of recommendations 20 (20b); an analysis of the property tax impacts of future financial gaps outside of the current budget cycle (3a); a broader view of the link between The City’s financial projections, including the projected property tax increases, and the growth in the overall economy (10a); and a review of revenue sources (24b).

<p><b>Implementation Phase:</b> Installation</p>	<p><b>What has happened over the past 6 months:</b> The Long Range Financial Plan (LRFP) project team validated the modelling and projections, and finished the LRFP report draft. The draft of the main report and overview were reviewed both internally and externally for multiple rounds and finalized and approved by the Steering Committee. The LRFP report was presented to the Executive Leadership Team and received their unanimous approval. The LRFP was reported to the Executive Committee on 2021 November 9 and was further referred to the Strategic Meeting of Council in Q1 2022.</p>
<p><b>Expected Implementation Date:</b> December 2022</p>	
<p><b>Current Status:</b> On schedule</p>	<p><b>What’s next:</b> The LRFP will be presented to the Strategic Meeting of Council in Q1 2022. A one-time funding request is included in the 2022 Adjustments to the 2019-2022 One Calgary Service Plans and Budgets (C2021-1436) to develop an implementation program for the Long Range Financial Plan in 2022.</p>
<p><b>Customers:</b> Council, the public, Administration planning &amp; budgeting stakeholders</p>	<p><b>Partners:</b> Corporate Budget Office; Finance;</p>
<p><b>Overall Risk Rating:</b> High</p>	<p><b>Strategic Alignment:</b> ImagineCALGARY, MDP&amp;CTP, One Calgary</p>



# Financial Task Force Implementation Report

## Long Range Financial Plan Update – External Review

**Led By:** Financial Support

**Related Administrative Action:** 1c

**Description:** The External Review process is to seek opinions and advice to The City’s Long Range Financial Plan (LRFP) Update from external reviewers with finance, economics, financial modelling and projection, and fiscal impact analysis expertise. The External Review Panel plans to have 3-5 members to ensure a good coverage of knowledge and to provide value-added advice to LRFP Update process and overall validation. The external review should provide an overall validation on the high level reasonability of the financial projections methodology and results.

This proposal should be approved after the completion of the first draft of the LRFP Update report in 2021 April, so that the external review can be conducted before the report is presented to the Executive Leadership Team, Priorities and Finance Committee and Council later this year.

<p><b>Implementation Phase:</b> Benefits Realization</p>	<p><b>What has happened over the past 6 months:</b> The Long Range Financial Plan (LRFP) project team sought recommendation and direction from the Steering and Working Committees on the candidates of the external review plan, and reached out to external reviewers and requested for their review on the LRFP draft. The external review panel provided their independent opinions and feedbacks to the LRFP report. The project team discussed their feedbacks and incorporation. The recommendations from the external reviewers have been incorporated in the LRFP report and approved by the Steering Committee. The report was presented to the Executive Leadership Team and approved unanimously. The LRFP was reported to the Executive Committee on 2021 November 9 and was further referred to the Strategic Meeting of Council in Q1 2022.</p>
<p><b>Expected Implementation Date:</b> September 2021</p>	
<p><b>Current Status:</b> Completed</p>	<p><b>What’s next:</b> The external review results have been incorporated and helped strengthen and validate the Long Range Financial Plan report.</p>
<p><b>Customers:</b> Council, the public, Administration planning &amp; budgeting stakeholders</p>	<p><b>Partners:</b> Corporate Budget Office; Finance; External Reviewers</p>
<p><b>Overall Risk Rating:</b> Medium</p>	<p><b>Strategic Alignment:</b> imagineCALGARY, MDP &amp; CTP, One Calgary</p>



# Financial Task Force Implementation Report

## Municipal Finance White Paper

**Led By:** Financial Support

**Related Administrative Action:** 9a, 13a, 21b, 22b, 24b

**Description:** Administrative actions 9a, 13a, 21b, 22b and 24b ask for analyses and recommendations about municipal revenue and expenditure choices, concerning both the traditional economy and the emerging digital economy. Some of the choices are within Council’s control, but others need the Alberta government permission to access them. As a result, Corporate Economics will bring all the action items together and provide a municipal finance white paper that updates new developments/challenges/solutions in municipal finance in recent years. The report will provide theoretical foundations and empirical evidence for City Council and the province to make appropriate fiscal policy updates for Calgary.

<p><b>Implementation Phase:</b> Installation</p>	<p><b>What has happened over the past 6 months:</b> Corporate Economics has created an FTF project team with a project charter and work plan. Tasks have been assigned to cover all the action items. Over the past six weeks, the team has reached out to multiple sources for information and data. The team has made significant progress in subject background review, data collection and analysis. Weekly discussions by the project team are ongoing to address matters arising.</p>
<p><b>Expected Implementation Date:</b> March 2022</p>	
<p><b>Current Status:</b> On schedule</p>	<p><b>What’s next:</b> 1. By the end of January 2022, the project team will have a PPT ready showing the key points in the white paper. The PPT will be presented in the 2022 Trends Event Municipal Funding + Citizen to Gov’t Session between Jan 31 and Feb 4, 2022. 2. By the end of Q1 2022, a full report with recommendation will be ready to share.</p>
<p><b>Customers:</b> City Council, Administration leadership team, taxpayers and the provincial and federal governments</p>	<p><b>Partners:</b> Assessment, Intergovernmental &amp; Corporate Strategy, Law, FTF Implementation Team</p>
<p><b>Overall Risk Rating:</b> Medium</p>	<p><b>Strategic Alignment:</b> 2022 Trends Event and Integration</p>



# Financial Task Force Implementation Report

## Patio Program 2020/2021

**Led By:** Executive Leadership

**Related Administrative Action:** 5a

**Description:** On May 11, 2020, City Council unanimously approved a COVID-19 relief package to support temporary outdoor patios. As a result, City Administration developed a new process to support local establishments for approvals of temporary patios on public lands, as well as additional measures to process applications for those residing on private property. We are continuing those supports this year and launching the program earlier to give businesses more time to prepare for the season.

A temporary permission will be issued at no cost for an outdoor temporary patio. Development permits fees for patios are also waived. Food establishments, like restaurants, cafes and pubs can use a temporary patio to extend onto adjacent public road right of way by placing tables and chairs on the sidewalk. Establishments are required to acknowledge several conditions within the temporary permission including protecting pedestrian accessibility, insurance, and indemnification.

Other retailers may temporarily use a sidewalk, like a sidewalk sale, under the Land Use Bylaw. The use of outdoor space is one way to enable more physical distancing for both patrons and staff.

<p><b>Implementation Phase:</b> Benefits Realization</p>	<p><b>What has happened over the past 6 months:</b> During 2021, 441 patio permits were issued by The City of Calgary. Of those, 219 were temporary patio permits in rights-of-way. After a period of restrictions in April/May, outdoor patio dining resumed on June 1, 2021. Beltline Urban Mural Project (BUMP) partnered with The City of Calgary to paint 30 jersey barriers for temporary patios.</p>
<p><b>Expected Implementation Date:</b> March 2021</p>	
<p><b>Current Status:</b> Completed</p>	<p><b>What's next:</b> On September 13, 2021, City Council approved the establishment of a permanent patio program. Planning has begun to guide its implementation.</p>

<p><b>Customers:</b> Businesses and retailers who want/need a patio (private property, public, temporary public)</p>	<p><b>Partners:</b> Business Improvement Areas (BIAs) Mayor's Office + Council Tourism Calgary Calgary Parking Authority (CPA) ENMAX Alberta Gaming and Liquor Commission (AGLC) Calgary Building Services (PD) Calgary Growth Strategies (PD) Community Planning (PD) Stream 3 (PD) Roads Calgary Community Standards (Community Services) Calgary Neighborhoods (Community Services) Fire Corporate Analytics and Innovation (DCMO) Customer Service and Communications</p>
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<p><b>Overall Risk Rating:</b> Medium</p>	<p><b>Strategic Alignment:</b> Calgary in the New Economy (Economic Strategy) Rethink to Thrive Strategy Business Sector Task Force TOR</p>
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<p><b>Performance Measures</b></p>	<p><b>Performance Story</b></p>
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# Financial Task Force Implementation Report

	<p>Streamlining of patio process, fee relief and addition of temporary patios on public lands provided support to businesses during the COVID-19 pandemic and enabled 116 businesses to extend their capacity under restrictions and thus keep them in business in 2020. The 2021 patio season is just beginning, and those numbers will be included by fall 2021.</p>
	<p>From the 17 Ave BIA patio survey in 2020 (approx. 50 respondents, 98% food industry/restaurants), 64% of respondents found the process to obtain the permit for a patio extension somewhat to very easy. It is estimated that satisfaction in 2021 will increase as The City built upon and improved the program. Additionally, in 2020 close to 47% advised that 21-50% of their revenues came from the patio extensions, while 22% advised that 50-100% of their revenue came from the patio extensions. It is anticipated that these numbers will remain the same. 90% of respondents agreed the patio extensions helped their businesses stay open, a sentiment supported by members of the Business Sector Task Force (not surveyed).</p>



# Financial Task Force Implementation Report

## Promoting Calgary - Downtown Strategy

Led By: City Planning & Policy

Related Administrative Action: 33a

**Description:**  
 Downtown is central to Calgary’s economic recovery. Downtown is the economic and cultural heart of Calgary. It’s our central hub for business, innovation and creativity. What happens downtown, especially in terms of real estate, has a direct impact on the rest of the city. Calgary needs a strong core to grow our economy, create jobs and fund the City services we rely on every day.  
 To increase vibrancy and economic vitality of the downtown, on April 26, 2021, Council approved the Greater Downtown Plan and initial investment for implementation including the following:  
 -Financial incentives for office conversion, office replacement and new residential development  
 -Financial incentives to offset +15 Fund contributions for residential development  
 -Funding for impactful capital projects to improve public spaces, create vibrancy and support complete neighbourhoods  
 -Funding to activate downtown public spaces with festivals, events and community spaces to build vibrancy  
 -Funding over four years for a dedicated City of Calgary Downtown team  
 -Funding for Arts Commons Transformation

<p><b>Implementation Phase:</b> Implementation</p>	<p><b>What has happened over the past 6 months:</b>                  Launched the Downtown Development Incentive Program Phase 1 (office to residential conversion) on August 16 to September 15, 2021. There is significant market interest. There were 13 applications received. Evaluation process underway.                   Opened the Stephen Avenue Safety Hub in September, 2021. The City of Calgary and Calgary Police Service have opened a single, centralized location on Stephen Avenue where uniformed officers can collaborate on common issues, complete necessary paperwork and store equipment. This innovative working space was generously donated by the Calgary Downtown Association and Slate Management and will operate for as a two-year pilot project. This initiative provides the opportunity to increase the visibility of uniformed Police, Bylaw and Transit officers in the downtown core, enhancing the sense of safety and security for citizens and businesses.                   Advanced projects such as: the Future of Stephen Avenue, Tomorrow’s Chinatown, and Eau Claire Area Improvements. The Downtown Ambassadors and the Stephen Avenue Safety Hub received funding from Council to operate these two downtown community safety initiatives through to 2023.</p>
<p><b>Expected Implementation Date:</b> [Expected Implementation Date]</p>	

<p><b>Current Status:</b> On schedule</p>	<p><b>What’s next:</b>                  Prioritize and align capital investments.                  Work with partners to program and activate places and spaces in the winter season and plan for spring/summer 2022.                  Analyze and develop terms of reference for the Downtown Development Incentive Program Phase 2 (office to other adaptive uses).                  Support Downtown Ambassador Program</p>
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<p><b>Customers:</b>                  The City of Calgary                  Business Owners                  Institutions (Post-Secondary, for example)</p>	<p><b>Partners:</b>                  CED, CMLC, UofC, Tourism Calgary, BIAs</p>
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<p><b>Overall Risk Rating:</b> High</p>	<p><b>Strategic Alignment:</b>                  Calgary in the New Economy, Resilience Strategy, Industrial Land Strategy</p>
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# Financial Task Force Implementation Report

## Promoting Calgary - Economic Strategy

Led By: Economic Development & Tourism  
Related Administrative Action: 33a

**Description:** Vision: Calgary is the city of choice for the world’s best entrepreneurs. We embrace 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: An economic strategy for Calgary is a community built and supported strategy, that was guided by the community’s business and community leaders representing a variety of industries, post-secondary institutions and municipal agencies. Insights were also gathered from community stakeholders and citizens. Calgary Economic Development stewards implementation of the strategy in collaboration with other stakeholders including Civic Partners

<p><b>Implementation Phase:</b> Implementation</p>	<p><b>What has happened over the past 6 months:</b></p> <ul style="list-style-type: none"> <li>• Two Opportunity Calgary Investment Fund RFPs issued: Innovation Ecosystems and Fund Manager</li> <li>• OCIF announced \$2M in investments (Endeavor Global Canada, and SVG Ventures/THRIVE)</li> <li>• Significant community engagement to pressure test Calgary’s economic strategy</li> <li>• Soft launch opening of the Platform Innovation Centre</li> <li>• The International Economic Development Council (IEDC) awarded Calgary Economic Development with a gold rank for its Calgary sector videos and a bronze rank for its New Economy LIVE event series</li> <li>• , Calgary has seen 29 venture capital investments totaling \$252M and set to outpace investment activity in the previous year</li> <li>• Startup Genome Global Startup Ecosystem Report ranked Calgary as one of the top 100 emerging tech startup ecosystems in the world, and second in Canada as an innovation ecosystem with the best “bang for buck” for the average amount of money raised by local tech startups. The city was also one of the top 20 North American cities for hiring affordable talent</li> <li>• Calgary recorded double-digit growth in tech talent and total tech jobs over the past five years, rising six spots to 28th place among the Top 50 North American markets in CBRE’s 2021 Scoring Tech Talent report</li> <li>• Notable attraction wins in 2021 include: RBC Innovation Hub, Endeavor Canada, Infosys, Mphasis, SVG Ventures   Thrive</li> </ul>
<p><b>Expected Implementation Date:</b> [Expected Implementation Date]</p>	
<p><b>Current Status:</b> On schedule</p>	<p><b>What’s next:</b></p> <ul style="list-style-type: none"> <li>• Continued exploration and development of a made-in-Calgary Innovation District</li> <li>• Grand opening of the Platform Innovation Centre in early 2022</li> <li>• Progress update on implementation of the economic strategy to Executive Committee by May 2021</li> <li>• Testing the resilience of the economic strategy through continued community outreach, future trend analysis and scenario development, and inclusion of our Indigenous communities of Treaty 7 and Metis Nation of Alberta Region 3.</li> <li>• The Final New Economy LIVE event of 2021 will focus on talent retention and perceptions of Calgary with youth and young adult demographics</li> <li>• The Work Integrated Learning Program will begin development after successful 2021 federal funding and partnership development</li> </ul>
<p><b>Customers:</b> The City of Calgary; Business Owners; Jobseekers and entrepreneurs; Institutions (Post-Secondary, for example); Visitors; Meeting and event planners; Investors</p>	<p><b>Partners:</b> CMLC, Post Secondaries, BIAs, community and business leaders, Civic Partners including Calgary Economic Development, Tourism Calgary, Platform Calgary, Calgary TELUS Convention Centre and other stakeholders</p>
<p><b>Overall Risk Rating:</b> High</p>	<p><b>Strategic Alignment:</b></p>



# Financial Task Force Implementation Report

	Calgary in the New Economy, Resilience Strategy, Downtown Strategy, Calgary's Destination Strategy, Enough for All poverty reduction strategy
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# Financial Task Force Implementation Report

## Provincial Engagement Plan

**Led By:** Corporate Governance

**Related Administrative Action:** 4d, 6b, 7c, 9b, 12a, 13b, 14b, 14c, 21c, 22c, 23b, 24c, 32b

**Description:** The Financial Task Force’s final report includes 12 recommendations whose successful implementation will depend on support from other orders of government, primarily the province, ranging from legislative or regulatory change to improved coordination and communication.

The engagement plan itself differentiates between FTF recommendations that are “advocacy ready” and those that require further research or development. In both cases, the plan proposes to enlist a combination of four different tools. Advocacy ready items will be dealt with on an accelerated timeline.

The selection of each of the different tools is based on past advocacy experience with the same or similar issues, the current intergovernmental context, and anticipated risks and opportunities.

The tools proposed are as follows: 1) aligning FTF recommendations with the Government of Alberta’s existing legislative priorities and engagement opportunities, including the ongoing Red Tape Review process; 2) enlisting FTF and other partner voices in a campaign for change, including public messaging; 3) engaging the Government of Canada in a tri-lateral conversation about municipal finance reform; 4) where opportunities exist for the Mayor and other Members of Council, sharing the aim of fiscal reform with local Members of the Legislative Assembly and Members of Parliament.

<p><b>Implementation Phase:</b> Implementation</p>	<p><b>What has happened over the past 6 months:</b> As directed in the provincial engagement plan approved by the Intergovernmental Affairs Committee in Q2 2021, a City of Calgary Resolution is being brought forward to the 2021 Alberta Urban Municipalities Association (AUMA), November 17-19. If approved by the membership, the resolution will call on the AUMA to join The City in calling on the Government of Alberta for municipal finance reform along the lines outlined in the FTF final report. The Mayor and other Members of Council attending the Convention will be provided with briefing materials enabling them to speak to the resolution and the recommendations of the FTF with municipal counterparts and provincial officials.</p>
<p><b>Expected Implementation Date:</b> March 2022</p>	
<p><b>Current Status:</b> On schedule</p>	<p><b>What’s next:</b> The plan will continue to be implemented following the timeline laid out in IGA2021-0615, returning with a progress update to IGA in Q1 2022. If the AUMA resolution above is approved, Administration will work with that organization to implement its direction.</p>
<p><b>Customers:</b> N/A</p>	<p><b>Partners:</b> Government of Alberta; Government of Canada; Financial Task Force and Economic Resilience Task Force members; AUMA;</p>
<p><b>Overall Risk Rating:</b> Low</p>	<p><b>Strategic Alignment:</b> A well-run city</p>



# Financial Task Force Implementation Report

## Provincially or Federally Mandated Services

**Led By:** Financial Support

**Related Administrative Action:** 14a

**Description:** When new or enhanced services are required by the provincial or federal government, either explicitly through an agreement or implicitly through legislative change (e.g., cannabis legislation), Administration will continue to evaluate the costs associated with the change.

The service / business unit that is primarily responsible for implementing the change would be responsible for evaluating the costs and the budgetary implications would be raised at an appropriate time, with the final budgetary decisions coming in the November budget week. If required advocacy positions would be developed to support The City’s position using this cost information.

<p><b>Implementation Phase:</b> Benefits Realization</p>	<p><b>What has happened over the past 6 months:</b> The current process was verified by the Corporate Budget Office and Intergovernmental and Corporate Strategy.</p>
<p><b>Expected Implementation Date:</b> November 2022</p>	<p><b>What’s next:</b> Administration will continue to evaluate the programs and policies of other levels of government and advise when mandates, or anything equivalent to a mandate, occurs and the recommended actions to address the new mandates.</p>
<p><b>Current Status:</b> Completed</p>	<p><b>Partners:</b> Service Owners</p>
<p><b>Customers:</b> Council, Service Owners</p>	<p><b>Strategic Alignment:</b> Service Plans and Budgets</p>
<p><b>Overall Risk Rating:</b> Slight</p>	



# Financial Task Force Implementation Report

## Regional Economic Development

Led By: City Planning & Policy

**Related Administrative Action:** 15a

**Description:** 15a. Regional Economic Development is a priority for the Calgary Metropolitan Region Board. This is an opportunity for The City of Calgary to participate in a coordinated regional approach to advance the economic competitiveness of the region while supporting the economic and financial health of Calgary.

Implementation depends upon external support and may include activities such as negotiation, advocacy and collaboration with the CMRB and participating municipalities. In general, Calgary has some important regional roles in attracting talent, creating quality of life, and providing employment lands with efficient access to markets.

The Regional Planning team will advocate to the CMRB Administration and support City elected officials in the effort to prioritize a regional economic development strategy.

It is expected that work on regional economic development will start to occur in 2022. This requires an investment in terms of time and relationship building. These actions may take multiple years to start to come to fruition.

<p><b>Implementation Phase:</b> Planning</p>	<p><b>What has happened over the past 6 months:</b> The Calgary Metropolitan Region Board held three Regional Economic Development Workshops with the Board from June through to September 2021. The workshops helped to develop potential regional economic development priorities, which will inform future work taken on by the Board.</p>
<p><b>Expected Implementation Date:</b> December 2025</p>	
<p><b>Current Status:</b> On schedule</p>	<p><b>What's next:</b> It is expected that work on regional economic development will continue to occur in 2022. Through the strategy the new board will have to continue following the learning from the workshops had.</p>

<p><b>Customers:</b> Calgarians</p>	<p><b>Partners:</b> Internal  <ul style="list-style-type: none"> <li>•Mayor's Office &amp; elected officials representing on CMRB Board &amp; Committees</li> <li>•Business units may include Transportation, Transit, Water Resources, Planning &amp; Development (Calgary Growth Strategies, Community Planning, Geodemographics), Recreation, Parks.</li> </ul>                       External partners include Calgary Metropolitan Region Board (CMRB), member municipalities of the CMRB, regional agencies and civic partners, e.g. Calgary Economic Development.</p>
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<p><b>Overall Risk Rating:</b> Medium</p>	<p><b>Strategic Alignment:</b> This project aligns with several Council, corporate, and business unit goals:  <ul style="list-style-type: none"> <li>• Calgary Metropolitan Region Board (CMRB) regulation</li> <li>• A Well-Run City (Council Priority)</li> </ul> </p>
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# Financial Task Force Implementation Report

## Regional Strategies

**Led By:** City Planning & Policy

**Related Administrative Action:** 16a, 17a, 28b, 29b, 30b

**Description:** Implementation of the administrative actions may depend on negotiation, advocacy, and collaboration with neighbouring municipalities. This requires an investment in terms of time and relationship building. These actions may take multiple years to start to come to fruition.

16a. There are several opportunities to pursue cost sharing with neighbouring municipalities:

- Administration is working with Rocky View County on studies with the aim of establishing cost sharing agreements. The studies include the East Stoney Freeway Study (in collaboration with Transportation), Regional Recreation Study (in collaboration with Recreation). This work is scheduled to be complete by the end of 2022.
- The Regional Planning team is supporting bi-lateral mediated discussions with Rocky View County. Cost sharing will be a discussion topic. This work is anticipated to take one to two years – possibly completing by end of 2023.
- Through the CMRB, The City will participate in two Joint Planning Areas (JPAs) as described in the CMRB Growth Plan. The objective for collaborating on JPAs is for municipalities to jointly plan and coordinate growth and infrastructure. This is with the recognition that intermunicipal planning is complex and will accommodate relatively higher-level densities. Municipalities participating are required to explore cost-sharing as part of intermunicipal planning and servicing. This work is anticipated to take three to four years – possibly completing by end of 2025.

17a. The Regional Planning team is involved in several initiatives to protect The City’s competitiveness. Initiatives include:

- Off-site levies will be discussed as part of the CMRB JPA work. This work is anticipated to take three to four years to complete.
- Annexation in Rocky View County has been initiated to support The City’s Industrial Strategy. This work is anticipated to take two to four years to complete.
- The Regional Planning team will support Corporate discussions on intermunicipal and regional servicing and the creation of supporting policies as a result of servicing requests through the CMRB. This work is anticipated to take three to four years to complete.

28b, 29b & 30b. Incorporate the results of the studies into recommendations around regional discussions and negotiations as well as recommendations for user fee pricing. For example:

- Identify the need for studies to inform the Terms of Reference for JPAs within the CMRB
- Inform bilateral mediated discussions or intermunicipal discussions/studies
- Use information to inform related work where applicable; e.g., annexation analysis.

The timing of these implementation actions depends upon other business providers.

<p><b>Implementation Phase:</b> Planning</p> <p><b>Expected Implementation Date:</b> December 2025</p>	<p><b>What has happened over the past 6 months:</b></p> <ul style="list-style-type: none"> <li>• Cost-sharing with Rocky View: Joint administrative meetings were held to review the analysis from the two studies that were conducted; East Stoney Freeway Study and Regional Recreation Study.</li> <li>• Bilateral mediated discussions with Rocky View County: Letters were exchanged initiating the project which is identified on Calgary’s work plan to start 2022 and is anticipated to be identified on Rocky View County’s work plan.</li> <li>• Two Joint Planning Areas: work on the JPAs is pending approval of the Growth Plan by the Province.</li> <li>• Annexation in Rocky View County: The annexation was initiated through a letter to Rocky View County and the Land and Property Rights Tribunal. The work is identified on Calgary’s work plan</li> <li>• Corporate discussions on intermunicipal and regional servicing: no formal work has begun on this yet.</li> </ul>
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# Financial Task Force Implementation Report

<p><b>Current Status:</b> On schedule</p>	<p><b>What's next:</b></p> <ul style="list-style-type: none"> <li>• Cost-sharing with Rocky View: East Stoney Freeway Study and Regional Recreation Study; agreement on cost-sharing is scheduled to be complete by the end of 2022.</li> <li>• Bilateral mediated discussions with Rocky View County: initiation of bilateral meetings are anticipated to start.</li> <li>• Two Joint Planning Areas: context studies are anticipated to start.</li> <li>• Annexation in Rocky View County.</li> <li>• Corporate discussions on intermunicipal and regional servicing.</li> </ul>
<p><b>Customers:</b> Calgarians</p>	<p><b>Partners:</b></p> <p>Internal</p> <ul style="list-style-type: none"> <li>• Mayor's Office &amp; elected representatives to the CMRB Board &amp; Committees</li> <li>• Business units may include Transportation, Transit, Water Resources, Planning &amp; Development (Calgary Growth Strategies, Community Planning, Geodemographics), Recreation, Parks.</li> </ul> <p>External partners include Calgary Metropolitan Region Board (CMRB), member municipalities of the CMRB, regional agencies and municipal partners (CED).</p>
<p><b>Overall Risk Rating:</b> Medium</p>	<p><b>Strategic Alignment:</b></p> <p>This project aligns with several Council, corporate, and business unit goals:</p> <ul style="list-style-type: none"> <li>• Calgary Metropolitan Region Board (CMRB) regulation</li> <li>• A Well-Run City (Council Priority)</li> </ul>



# Financial Task Force Implementation Report

## Residential property taxes and utility charges survey

**Led By:** Financial Support

**Related Administrative Action:** 18a, 18b, 18c

**Description:** In response to Task Force recommendation 18a, Corporate Economics will continue to ask participants in the City’s Residential Property Tax Survey what the non-residential property taxes per square foot are in their municipality. Additionally, when survey participants, and other municipalities who chose not to participate in the survey, do not provide this information, Corporate Economics will use reasonable best efforts to collect this information from public sources.

<p><b>Implementation Phase:</b> Benefits Realization</p>	<p><b>What has happened over the past 6 months:</b> The 2020 residential property taxes and utility charges survey is finished and published on Oct 25, 2021. It includes two new questions regarding non-residential property classes: non-residential taxes per 1,000 sf per year for two types of commercial properties: 1. Downtown high-rise office space, and 2. big box retail of 50,000 square feet or more. There are 8 cities responded to these questions and the findings are analyzed in our 2020 survey report.</p>
<p><b>Expected Implementation Date:</b> October 2021</p>	
<p><b>Current Status:</b> Completed</p>	<p><b>What’s next:</b> The project is completed. No further actions needed at this time.</p>
<p><b>Customers:</b> City Council, Administration leadership team, taxpayers and potential investors who want to know the competitiveness of Calgary’s property taxes</p>	<p><b>Partners:</b> Participating municipalities</p>
<p><b>Overall Risk Rating:</b> High</p>	<p><b>Strategic Alignment:</b> Recommendations of the Task Force</p>



# Financial Task Force Implementation Report

## Restaurant/Brewery Experience Improvement Program

**Led By: Executive Leadership**

**Related Administrative Action: 5a**

**Description:** The Business Advisory Committee (BAC) working group had identified the restaurant and brewery industry as a key priority for BAC to address in 2020. BAC hosted three confidential meetings with representatives from the restaurant and brewery sector in 2020 July with the objective to collect their feedback on their experiences with The City.

The whiteboarding sessions resulted in BAC advising Administration to make tangible improvements for report back in Q2 2022 on:

- Customer experience: relationship between business customers and The City.
- Education & training: knowledge for a successful journey and a consistent service.
- Business licence: value articulation and modernization.

The progress of the improvement program so far has created an ideal environment to continue executing the solutions to address the issues identified by the restaurant/brewery stakeholders. Even though the focus of the work has been on the restaurant/brewery sector, the solutions being implemented will support the entire business community in Calgary.

<p><b>Implementation Phase:</b> Implementation</p>	<p><b>What has happened over the past 6 months:</b> Business Experience Representative Pilot started on March 1. The Business Experience Representative (BER) acts as a consistent 'One Stop Support' for business customers. They are knowledgeable on the application intricacies of each business type, and they are available to help the customer throughout all of their approvals and inspections steps, and will provide consistent support to customers from beginning to end. The pilot ends December 1, 2021, and so far has improved business licensing timelines for restaurants and breweries by 21%.</p>
<p><b>Expected Implementation Date:</b> March 2022</p>	
<p><b>Current Status:</b> On schedule</p>	<p><b>What's next:</b> We want to have 5 staff permanently hired into the position by the end of 2021. Training and operationalization will occur in early 2022. Performance measures are being finalized which include clear timelines.</p>
<p><b>Customers:</b> -Restaurant/Brewery industry -Impacts hotel and hospitality industry as well as other connected retail businesses.</p>	<p><b>Partners:</b> Planning and Development Community Services Business Advisory Committee City Manager's Office Stakeholders from Restaurant/Brewery Industry</p>
<p><b>Overall Risk Rating:</b> Medium</p>	<p><b>Strategic Alignment:</b> Council Direction – Business Advisory Committee mandate Rethink to Thrive Strategy Calgary in the New Economy (Economic Strategy)</p>
<p><b>Performance Measures</b></p>	<p><b>Performance Story</b></p>
	<p>Business Experience Representative Pilot: launched end of Q1 2021 to gather appropriate customer insights on an ongoing basis.</p>



# Financial Task Force Implementation Report

## SAVE Program Integrated in Budget Adjustments

**Led By: Executive Leadership**

**Related Administrative Action: 31b**

**Description:** On 2019 November 29 (C2019-1052), during the 2020 Adjustments to One Calgary Service Plans and Budgets Strategic Meeting, Council directed SISV to inform the 2020 November budget deliberations by identifying the strategies and tactics to reduce the responsibility of taxpayers for the remainder of the One Calgary cycle, including targeting: a reduction in operating budgets of \$24 million in 2021 and \$50 million in 2022 to deliver modern and affordable municipal lines of service within our City mandate; new or improved revenue streams for the City, and ensure all current initiatives being undertaken related to savings and efficiency be wrapped into the above process going forward.

The Solutions for Achieving Value and Excellence (SAVE) program Wave 1 business cases were integrated in the Mid-Cycle Adjustment process, achieving \$26.4 million in base budget reductions in 2021.

During the Mid-Cycle Adjustments, Council directed an additional \$6M in savings through the SAVE program to replace the projected cost of a one-time 2021 residential property tax rebate with permanent reductions in 2022. This cost was amended to \$1.2M with passage of the property tax bylaw in March 2021. SAVE will bring Wave 2 and 3 business cases to the budget adjustments process in November 2021, targeting an additional \$51.2 million in base budget reductions for 2022 (a \$1.2M increase from the original \$50M).

<b>Implementation Phase:</b> Implementation	<b>What has happened over the past 6 months:</b> SAVE business cases are integrated into budget adjustments for November 2021.
<b>Expected Implementation Date:</b> November 2021	
<b>Current Status:</b> Completed	<b>What's next:</b> Complete implementation for any remaining business cases that had a longer implementation timeframe.
<b>Customers:</b> Council and by extension citizens and businesses.	<b>Partners:</b> Corporate Initiatives Corporate Budget Office Various services impacted by business cases
<b>Overall Risk Rating:</b> Low	<b>Strategic Alignment:</b> SAVE Program Multi-Year Business Planning and Budgeting Policy (CFO004)
<b>Performance Measures</b>	<b>Performance Story</b>
	The SAVE program achieved more than expected for 2021. For 2022 SAVE is striving to achieve \$51.2 = \$50 million + \$1.2 million for the residential rebate. The original target was \$50 million.



# Financial Task Force Implementation Report

## Service Plans and Budgets 2023-2026 Program Plan

**Led By: Executive Leadership**

**Related Administrative Action:** 4a, 10a, 1a, 1b, 1c, 2a, 2b, 3a, 3b, 4b, 5a, 7a, 7b, 8a, 9a, 11a, 18a, 18b, 19a, 20a, 20b, 20c, 21b, 23a, 24b, 25a, 27a, 27b

**Description:** Service plans and budgets serve as the foundation for understanding our service delivery, the value it provides, and how this contributes to the quality of life in our community.

The One Calgary program team has started drafting the program plan for 2023-2026 Service Plans and Budgets (SPB). The program team will focus on program coordination as a key requirement of the project plan. Coordination will create a line of sight between different segments of work, completed over several years by different groups, supporting Council and citizens to use that information to provide feedback and enable evidence-based decisions.

Key links for coordination include, but are not limited to:

- Long-Range Financial Plan
- Economic Outlook
- Revenue Review
- Assessment processes

The program team proposes to develop templates (Attachment, PowerPoint slide and 'visual cue') for use by all stakeholders bringing information to citizens, business and Council in order to link to 2023-2026 SBP. Strategic alignment between each individual report supports Council decision-making.

Both the One Calgary program team and the Financial Task Force Implementation Team will support the rollout and use templates by stakeholders.

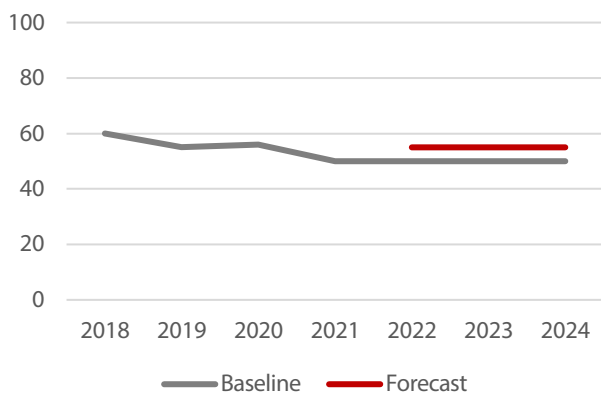
Success of this proposal entails a program plan which contains related work being completed across the corporation (financial or service) to ensure that line of sight is achieved through focused coordination, shared understanding and alignment of financial decisions.

<p><b>Implementation Phase:</b> Installation</p>	<p><b>What has happened over the past 6 months:</b> Program plan has been approved, resources established, and plan has been initiated. Design of 'visual cue' is complete.</p>
<p><b>Expected Implementation Date:</b> April 2023</p>	<p><b>What's next:</b> Visual cue will begin to appear on reports to Council. Program plan will be kicked off with services.</p>
<p><b>Current Status:</b> On schedule</p>	<p><b>Customers:</b> Citizens, businesses and Council</p> <p><b>Partners:</b> Corporate Initiatives Corporate Budget Office Infrastructure Calgary Calgary Growth Strategies Intergovernmental and Corporate Strategies Assessment Finance CFOD (Including Communications) Financial Task Force Implementation Team Corporate Economics Long-Range Financial Plan Team</p>
<p><b>Overall Risk Rating:</b> Medium</p>	<p><b>Strategic Alignment:</b> Multi-Year Business Planning and Budgeting Policy Rethink to Thrive</p>
<p><b>Performance Measures</b></p>	<p><b>Performance Story</b></p>



# Financial Task Force Implementation Report

The City does a good job of providing citizens with information about how their property tax dollars are invested in various City services. (Fall Survey only) (Per cent agree)



With these additional tools to support citizen engagement and understanding, maintaining the historical levels of satisfaction should be achievable.

This would be a new question to include in the Lessons Learned sessions with Council. There is no previous data to use as a baseline.



# Financial Task Force Implementation Report

## ShopHERE powered by Google

**Led By: Executive Leadership**

**Related Administrative Action: 5a**

**Description:** The City of Calgary joined the ShopHERE powered by Google program to help independent business and artists build a digital presence and minimize the economic impact of the COVID-19 pandemic.

In May 2020, Google Canada announced a one-million-dollar investment to enable Digital Main Street to expand the program to municipalities across the country, offering more businesses the opportunity to build their own online store. Because the opportunities afforded by the digital economy are still limited if people don't have the right skills, the program also helped small businesses receive the digital skills training needed to participate in the digital economy.

The City allocated funds for a pilot in September 2020 and recently launched a second phase in February 2021 utilizing funding from Western Diversification Canada. The program utilized local MBA students hired by Digital Main Street to support the digitalization of these small businesses, creating jobs for students in the process.

<p><b>Implementation Phase:</b> Benefits Realization</p>	<p><b>What has happened over the past 6 months:</b> The Province-wide program is up and running through BusinessLink. It is part of the Digital Economy Program (<a href="https://businesslink.ca/digital-economy-program/">https://businesslink.ca/digital-economy-program/</a>) The DEP consists of ShopHERE and Digital Service Squad. As Calgary has already implemented ShopHERE, we are focusing on the Digital Service Squad. Grants are available through BusinessLink and The City has applied for one to support a program that will be staffed by students and run out of BLE.</p>
<p><b>Expected Implementation Date:</b> March 2021</p>	

<p><b>Current Status:</b> On schedule</p>	<p><b>What's next:</b> The Business and Local Economy (BLE) team received a grant through BusinessLink's Digital Economy Program to implement a Digital Service Squad (DSS) program. Under this program, BLE will hire up to 15 post-secondary students to help small businesses increase their digital presence and capabilities. Members of the DSS will provide individualized service to businesses, helping identify digital needs and providing recommendations on the best ways to address them. Recruiting for these students will run from December 6 – 17 in preparation for a full program launch in Q1 2022. (The Digital Economy Program is a partnership between BusinessLink and Digital Main Streets made possible through funding from the Government of Alberta.)</p>
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<p><b>Customers:</b> Small businesses and artists</p>	<p><b>Partners:</b> -Digital Main Street (City of Toronto/Toronto Association of Business Improvement Areas) in partnership with Google Canada -Mayor's Office -Western Diversification Canada -Information Technology, Smart Cities Lead -Intergovernmental and Corporate Strategies Lead</p>
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<p><b>Overall Risk Rating:</b> Medium</p>	<p><b>Strategic Alignment:</b> Calgary in the New Economy (Economic Strategy) Rethink to Thrive Strategy Business Sector Task Force TOR + Business Advisory TOR</p>
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# Financial Task Force Implementation Report

## Subclass Investigation

**Led By: Property Assessment**

**Related Administrative Action: 26b**

**Description:** Arising from FTF Recommendation #26, Administration will review the use of non-residential subclasses to mitigate the distributional impacts of changes in assessments.

The proposed plan is as follows:

- 1) Research and discuss how subclasses may be used to mitigate tax distribution changes, including to support targeted, temporary tax relief;
- 2) Explore existing legislative subclasses;
- 3) Explore potential subclasses, including an overview of any required legislative changes;
- 4) Draft a report making recommendations as to which subclasses Administration ought to make use of and how, including an overview of required legislative changes as applicable;
- 5) Report findings to Council, requesting that they direct Administration to pursue (or not pursue) subclass implementation based on findings;
- 6) If approval received under #5, pass off report findings to ICS to advocate to the province as necessary;
- 7) If approval received under #5, draft a project scoping report including requirements and timelines for implementation.

<p><b>Implementation Phase:</b> Installation</p>	<p><b>What has happened over the past 6 months:</b> A project team was established. Preliminary research is complete. Background and historical subclass information has been compiled. The legislative analysis and literature review are nearing completion. A high-level environmental scan of assessment jurisdictions across Canada has been carried out. Past legal opinions on various subclass matters have also been reviewed. Assessments' "CIAO+ Team" has been engaged to determine the costs to incorporate additional subclass functionality into the new assessment system that's currently being developed.</p>
<p><b>Expected Implementation Date:</b> January 2022</p>	
<p><b>Current Status:</b> Delayed</p>	<p><b>What's next:</b> Research will be completed. The goal is to identify potential NR subclass types that would meet the intent of this recommendation and to begin drafting the final report in 2022 Q1.</p>
<p><b>Customers:</b> The City of Calgary Property Owners</p>	<p><b>Partners:</b> Assessment; Finance - Tax &amp; Receivables; Finance - Corporate Budget Office; Special Projects (Downtown Plan, Strategy).</p>
<p><b>Overall Risk Rating:</b> Low</p>	<p><b>Strategic Alignment:</b> A well-run city</p>





# Financial Task Force Implementation Report

## Support Local YYC campaign

**Led By:** Executive Leadership

**Related Administrative Action:** 5a

**Description:** A city-led campaign to support local businesses maintain support throughout a pandemic and into recovery.

Our campaign centred around storytelling. We featured prominent business owners and community members; letting them weave the business-friendly and support local narrative, rather than only telling the story ourselves.

Throughout the campaign, we had to balance with COVID-19 safety messaging, telling Calgarians how to support local in a safe way.

<b>Implementation Phase:</b> Benefits Realization	<b>What has happened over the past 6 months:</b> The Support Local program itself was not active over Q2 2021. Local businesses continued to use our collateral and there was some usage of the hashtag, but there were no specific campaigns or events.
<b>Expected Implementation Date:</b> July 2021	
<b>Current Status:</b> On schedule	<b>What's next:</b> Business & Local Economy is leading a Support Local campaign for the 2021 holiday season. It will launch in November using a variety of mediums. We will be engaging Business Improvement Areas and other community partners to promote shopping at local businesses.

<b>Customers:</b> Citizens Businesses	<b>Partners:</b> Calgary Economic Development Calgary Chamber of Commerce Tourism Calgary Calgary Arts Development Association Business Improvement Areas (BIAs) Mayor's Office
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<b>Overall Risk Rating:</b> Medium	<b>Strategic Alignment:</b> Calgary in the New Economy (Economic Strategy) Rethink to Thrive Strategy Business Sector Task Force TOR
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### Performance Story

Outside of our channels, Calgarians embraced the message. We were the top city in Canada for the #SupportLocal hashtag on Twitter in April, according to Twitter Canada, and saw over 55,000 uses of #SupportLocalYYC over the course of the campaign. Business stakeholders have noted to us the difference it made to their sales.

The campaign (to date) has been the most successful social media awareness campaign in The City of Calgary's history. With hundreds of posts, our campaign generated over 17.2 million impressions with over 133,000 positive reactions from citizens.



# Financial Task Force Implementation Report

## Tax Responsibility Study

**Led By:** Financial Support

**Related Administrative Action:** 19a, 19b

**Description:** The purpose of this plan is to examine how to proceed with a study about the tax share between residential and non-residential taxpayers and potential solutions to tax volatility. The plan is to provide a scoping report and then proceed with the study with results available to inform tax levy discussions as part of the 2023-2026 service plan and budget cycle. The scoping report will examine whether to contract with an independent expert to conduct the study.

<p><b>Implementation Phase:</b> Installation</p>	<p><b>What has happened over the past 6 months:</b> A scoping report on the issue of the distribution of the property tax levy between residential and non-residential properties is part of this report. The three main approaches are presented along with their implications.</p>
<p><b>Expected Implementation Date:</b> December 2021</p>	
<p><b>Current Status:</b> On schedule</p>	<p><b>What's next:</b> Administration will gather stakeholder feedback on the approaches and a potential target. Results will be presented along with the Taxation Policy for Council's consideration before 2022 Q2.</p>
<p><b>Customers:</b> The City of Calgary Residential and Non-Residential Property Owners</p>	<p><b>Partners:</b> Finance – Corporate Budget Office Corporate Initiatives Assessment Customer Service and Communications (CSC)</p>
<p><b>Overall Risk Rating:</b> High</p>	<p><b>Strategic Alignment:</b> A well-run city</p>



# Financial Task Force Implementation Report

## Taxation Policy

**Led By:** Financial Support

**Related Administrative Action:** 19c, 20c, 34b, 34c, 26b, 31a

**Description:** This implementation will draft of a formal Council policy on taxation based on the current Council decisions and Administration processes. The draft will be used as a basis for discussion with Council and Senior Management to determine any changes that are required for Council approval.

<p><b>Implementation Phase:</b> Installation</p>	<p><b>What has happened over the past 6 months:</b> Work has begun on drafting the current state and the implicit policies for inclusion in a current-state policy.</p>
<p><b>Expected Implementation Date:</b> January 2023</p>	
<p><b>Current Status:</b> On schedule</p>	<p><b>What's next:</b> The Taxation Policy will be presented to Council prior to the end of 2022 Q2.</p>
<p><b>Customers:</b> Tax payers Council Citizens</p>	<p><b>Partners:</b> Finance Assessment Corporate Initiatives</p>
<p><b>Overall Risk Rating:</b></p>	<p><b>Strategic Alignment:</b> Multi-Year Business Planning and Budgeting Policy for The City of Calgary CFO004 Long Range Financial Plan</p>



# Financial Task Force Implementation Report

## TIPP – Modernization

**Led By:** Taxation

**Related Administrative Action:** 25a, 25b

**Description:** Review Tax Instalment Payment Plan (TIPP) program. Evaluate and identify actions that could improve customer satisfaction along with increase the uptake of enrolment into the program.

Attain ways to broaden access points and simplify enrolment process. By enhancing customer interaction points, making it easier for property owners to enroll, will encourage enrolment into the program. Review potential productivity gains to redirect focus on enhanced customer service activities.

Review financial motivational incentives tied directly to the program to evaluate effectiveness of promoting enrolment within the TIPP program.

Investigate ways to effectively communicate and correspond the value and benefits of TIPP to help shape and design the program in a way that will promote the value of the program.

<b>Implementation Phase:</b> Installation	<p><b>What has happened over the past 6-months:</b></p> <ol style="list-style-type: none"> <li>Administration contracted a survey of approximately 500 property owners' experiences with and perceptions of TIPP.</li> <li>The Taxation Service has started scoping an online intake to facilitate quicker and more efficient processing of TIPP applications.</li> <li>The Taxation Service is working with Law to revise the TIPP Bylaw to reduce barriers to program entry.</li> </ol> <p>The Taxation Service has identified communication opportunities to promote TIPP and potentially increase participation.</p>
<b>Expected Implementation Date:</b> May 2022	

<b>Current Status:</b> On schedule	<p><b>What's next:</b></p> <ol style="list-style-type: none"> <li>Administration will present the results of the property owner TIPP survey to Council with recommendations to further promote awareness of the program and increase participation.</li> <li>Administration will present a revised TIPP Bylaw, proposing changes to reduce barriers to participation, to Council for approval.</li> <li>The Taxation Service will continue development of an online TIPP application with an anticipated go-live date of 2022 May.</li> <li>The Taxation Service will continue to evaluate and implement options to promote TIPP and increase program participation.</li> </ol>
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<b>Customers:</b> Residential and non-residential property owners	<b>Partners:</b> Taxation Law City Clerks (TBD) IT Customer Service Finance Communications support FTF Implementation Team
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<b>Overall Risk Rating:</b> Low	<b>Strategic Alignment:</b> Financial Task Force Recommendation
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<b>Performance Measures</b>	<b>Performance Story</b>
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# Financial Task Force Implementation Report

<p>TIPP Participation Enrolment (#)</p> <table border="1"> <thead> <tr> <th>Year</th> <th>Enrolment (#)</th> <th>Type</th> </tr> </thead> <tbody> <tr><td>2018</td><td>250,000</td><td>Baseline</td></tr> <tr><td>2019</td><td>260,000</td><td>Baseline</td></tr> <tr><td>2020</td><td>270,000</td><td>Baseline</td></tr> <tr><td>2021</td><td>280,000</td><td>Forecast</td></tr> <tr><td>2022</td><td>290,000</td><td>Forecast</td></tr> <tr><td>2023</td><td>295,000</td><td>Forecast</td></tr> <tr><td>2024</td><td>300,000</td><td>Forecast</td></tr> </tbody> </table>	Year	Enrolment (#)	Type	2018	250,000	Baseline	2019	260,000	Baseline	2020	270,000	Baseline	2021	280,000	Forecast	2022	290,000	Forecast	2023	295,000	Forecast	2024	300,000	Forecast	<p>Providing broader access point to enroll within the TIPP program, focus on financial benefits of the program, remove barriers to entry into the program, along with improving the customer service experience. Tracking number or properties enrolled within the TIPP program.</p>
Year	Enrolment (#)	Type																							
2018	250,000	Baseline																							
2019	260,000	Baseline																							
2020	270,000	Baseline																							
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2023	295,000	Forecast																							
2024	300,000	Forecast																							
<p>Property Tax Revenue collected through TIPP (\$M)</p> <table border="1"> <thead> <tr> <th>Year</th> <th>Revenue (\$M)</th> <th>Type</th> </tr> </thead> <tbody> <tr><td>2018</td><td>1.45</td><td>Baseline</td></tr> <tr><td>2019</td><td>1.45</td><td>Baseline</td></tr> <tr><td>2020</td><td>1.45</td><td>Baseline</td></tr> <tr><td>2021</td><td>1.45</td><td>Forecast</td></tr> <tr><td>2022</td><td>1.48</td><td>Forecast</td></tr> <tr><td>2023</td><td>1.48</td><td>Forecast</td></tr> <tr><td>2024</td><td>1.5</td><td>Forecast</td></tr> </tbody> </table>	Year	Revenue (\$M)	Type	2018	1.45	Baseline	2019	1.45	Baseline	2020	1.45	Baseline	2021	1.45	Forecast	2022	1.48	Forecast	2023	1.48	Forecast	2024	1.5	Forecast	<p>Monitoring the property tax levy collected through TIPP. This identifies the amount of revenue collected throughout the year for The City for those property tax accounts enrolled in the TIPP program. The higher the annual amount collected from TIPP will assist with smoother cash flow and provide more revenue stability.</p>
Year	Revenue (\$M)	Type																							
2018	1.45	Baseline																							
2019	1.45	Baseline																							
2020	1.45	Baseline																							
2021	1.45	Forecast																							
2022	1.48	Forecast																							
2023	1.48	Forecast																							
2024	1.5	Forecast																							



# Financial Task Force Implementation Report

## User Fees and Subsidies Policy Review

**Led By: Executive Leadership**

**Related Administrative Action: 4c**

**Description:** The User Fee and Subsidy Policy will be reviewed based on CC046 Council Policy Program by 2024. The review will have two phases: an Update of the Policy itself; and implementation of the policy through Service Plan and Budget processes.

The project plan is currently under development and the following opportunities relate to Financial Task Force and will be considered in the scope of work:

- the societal costs for services to non-residents without discouraging non- Calgaryans from increasing economic activity through their spending;
- user fee reliability which may contribute to reduced reliance on property taxes;
- clear understanding of the legal restrictions for user fees and levies;
- cost of service guidance in the implementation process; and
- link to the outcomes of the Revenue Review to determine any policy implications.

<b>Implementation Phase:</b> Installation	<b>What has happened over the past 6-months:</b> * Literature and Jurisdictional Review Complete.
<b>Expected Implementation Date:</b> December 2024	* Review of past public engagement and market research complete. * Current State assessment and opportunity identification underway.
<b>Current Status:</b> On schedule	<b>What's next:</b> * Future State identification * Opportunity identification and selection.

<b>Customers:</b> Citizens and businesses, visitors (non-residents) Council, Services with User Fees	<b>Partners:</b> Corporate Initiatives (One Calgary/Risk/PM/Reporting) FTF Implementation Team Corporate Budget Office CFO Departmental Strategist Economic Resilience Task Force Social Wellbeing Advisory Committee Intergovernmental & Corporate Strategies (Calgary Metropolitan Regional Board (CMRB)) City Clerks (Policy Review Program) Law Service Owners Departmental Planners & User Fee teams Subject Matter Experts (Social Well-Being, Environmental, Smart Growth, Economics, costing, etc.). Communications and Engagement
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<b>Overall Risk Rating:</b> Medium	<b>Strategic Alignment:</b> 1. Council and Admin Policies: Triple Bottom Line; Transparency and Accountability; Social Wellbeing; and Multi-Year Business Planning and Budgeting. 2. Long-Range Financial Plan and Economic Outlooks. 3. Policy Review Program.
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## Annual Assessment Cycle Continuation

**Led By: Property Assessment**

**Related Administrative Action: 26a**

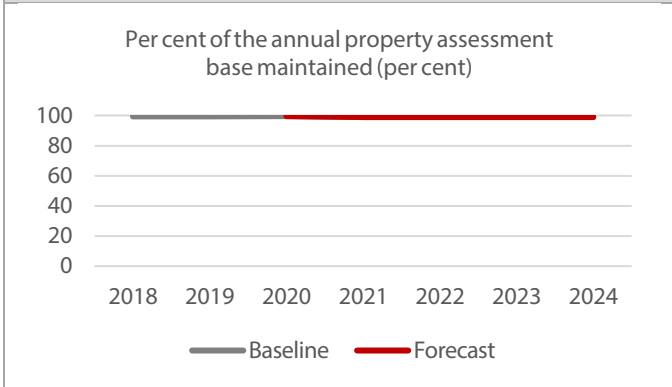
**Description:** Recommendation 26 was “do not sacrifice high-quality information available through annual property assessments that improve the ability to monitor and respond to underlying changes in the economy and real estate markets. The administrative action was "administration will continue the annual assessment cycle.”

<b>Implementation Phase:</b> Benefits Realization	<b>What has happened over the past 6 months:</b> N/A
<b>Expected Implementation Date:</b> December 2020	
<b>Current Status:</b> Completed	<b>What's next:</b> N/A

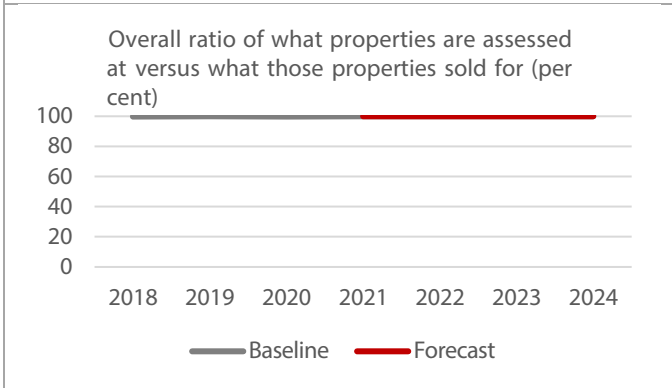
<b>Customers:</b> Property owners, City of Calgary, and Government of Alberta	<b>Partners:</b> NA
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<b>Overall Risk Rating:</b> Slight	<b>Strategic Alignment:</b> A well-run city
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Performance Measures	Performance Story
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“Per cent of the annual property assessment base maintained” is Assessment’s flagship performance measure and is at the core of everything Assessment does. Recent results have been historically strong and have been drastically outperforming set targets. Since this administrative action is maintaining the status quo there are no changes from originally set forecasts.



“Overall ratio of what properties are assessed at versus what those properties sold for” is Assessment’s preferred performance measure regarding the quality/accuracy of the assessment roll. There are a number of other performance measures that supplement this performance measure and provide additional context. Since this administrative action is maintaining the status quo there are no changes from originally set forecasts.

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1c	Service Plans and Budgets 2023-2026 Program Plan	37		Installation
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4a	Service Plans and Budgets 2023-2026 Program Plan	37		Installation
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5a	Business Perspectives Panel Research	8		Benefits
5a	Patio Program 2020/2021	24		Benefits
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9a	Municipal Finance White Paper	23		Installation
9b	Provincial Engagement Plan	29		Implementation

Status indicators:  Completed  On schedule  Delayed  Cancelled



Act.	Implementation Report Name	Page	Status	Phase
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11a	Service Plans and Budgets 2023-2026 Program Plan	37		Installation
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16a	Regional Strategies	32		Planning
17a	Regional Strategies	32		Planning
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21a	Economic Resilience Task Force (ERTF) Liaison	18		Planning
21b	Fabrication Workshop	19		Installation
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21b	Municipal Finance White Paper	23		Installation
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22a	Economic Resilience Task Force (ERTF) Liaison	18		Planning
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23a	Financial Narrative	20		Implementation
23a	Service Plans and Budgets 2023-2026 Program Plan	37		Installation

Status indicators: Completed On schedule Delayed Cancelled

Act.	Implementation Report Name	Page	Status	Phase
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24a	Economic Resilience Task Force (ERTF) Liaison	18		Planning
24b	Long Range Financial Plan Update	21		Installation
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24b	Municipal Finance White Paper	23		Installation
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26b	Taxation Policy	43		Installation
26b	Subclass Investigation	40		Installation
27a	Service Plans and Budgets 2023-2026 Program Plan	37		Installation
27a	Assessment Timeline	5		Planning
27b	Service Plans and Budgets 2023-2026 Program Plan	37		Installation
27b	Assessment Timeline	5		Planning
* 28a	Business Licensing Cost and Value	7		Planning
28b	Business Licensing Cost and Value	7		Planning
28b	Regional Strategies	32		Planning
* 29a	Business Licensing Cost and Value	7		Planning
29b	Business Licensing Cost and Value	7		Planning
29b	Regional Strategies	32		Planning
* 30a	Business Licensing Cost and Value	7		Planning
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32a	Countercyclical Fiscal Policy Report	14		Planning
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33a	Promoting Calgary - Downtown Strategy	26		Implementation
33a	Promoting Calgary - Economic Strategy	27		Implementation
33b	Downtown Survey	17		Planning
34a	Financial Narrative	20		Implementation
34b	Taxation Policy	43		Installation
34c	Taxation Policy	43		Installation
35a	Assessment Smoothing Investigation	4		Planning

\*Progress has been made on actions 28/29/30a within specific services (e.g. Business Licensing), but work on a unified approach to enterprise costing for this purpose has not yet begun, as reflected in the overview on page 2.

Status indicators: Completed On schedule Delayed Cancelled