

**Planning & Development Services Report to
Infrastructure and Planning Committee
2025 May 14**

**ISC: UNRESTRICTED
IP2025-0379**

Joint Use Coordinating Committee and Joint Use Reserve Fund Annual Update

PURPOSE

This report provides an annual update on the Joint Use Coordinating Committee (JUCC) work plan and the status of the Joint Use Reserve Fund (Reserve Fund). Also included is a summary of the Reserve Fund spending during 2024 (Attachment 2) and highlights of future demands on the Reserve Fund (Attachment 3).

PREVIOUS COUNCIL DIRECTION

In 2022 October, Council directed Administration to execute the Joint Use Planning Agreement with the Calgary Board of Education (CBE), Calgary Catholic Separate School District (CCSD) and Southern Francophone Education Region (FrancoSud) (IP2022-0533) (Attachment 1).

RECOMMENDATION:

That the Infrastructure and Planning Committee recommend that Council receive this report and its attachments for the Corporate Record.

GENERAL MANAGER COMMENTS

General Manager Deb Hamilton concurs with this report.

HIGHLIGHTS

- In 2024, \$3.5 million was received by the Reserve Fund from receipts and investment income earned and there were no expenditures.
- The 2024 December 31 Reserve Fund balance is \$63.1 million while the total anticipated future demands are \$237.0 million (\$48.0 million in 2025, and \$189.0 million beyond 2025).
- It is anticipated that the Reserve Fund will have a usable balance at the end of 2025 of \$100 thousand.
- The JUCC is currently working with partners to determine a strategy for the Reserve Fund concerns.
- Bill 51 amendments to the Education Act may have an impact on how The City and the School Boards plan for school sites and purchase land for school sites. City Administration and the School Boards are working to determine next steps.
- This report was prepared collaboratively by all four parties of the Joint Use & Planning Agreement (Agreement): CBE, CCSD, FrancoSud, and The City of Calgary.

DISCUSSION

The Joint Use Coordinating Committee: 2024 Year in Review

The JUCC continues to review and discuss a variety of applications relating to joint use interests such as development applications with cash-in-lieu of reserves – primarily in industrial and commercial areas of the city.

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On 2024 November 06, Administration brought a confidential report, 'Joint Use Reserve Fund Expenditure Request – IP2024-1080' forward to the Infrastructure and Planning.

The JUCC continues to provide awareness and transparency of its activities through two main initiatives:

- Hosting an annual open house (held on 2024 December 02) with partners where a question-and-answer period between the JUCC and all of the interested parties.
- Hosting an annual joint meeting between the JUCC and Site Planning Team (a subcommittee of the JUCC tasked with reviewing application proposals on joint use sites) to make sure all members are aware of new and ongoing issues around school sites and develop strategies to address them together.

In response to questions raised at the Annual Open House held in 2023, the JUCC hosted a School Site Design & Mobility workshop on 2024 March 21 to gather input from interested parties regarding safety issues arising during school drop off and pick up hours and potential mitigation measures. Several potential solutions were identified, including prioritization of student safety and site functionality on future school sites, targeted enforcement, and educating drivers and pedestrians on how to identify and avoid potential hazards on existing sites.

The Reserve Fund for 2024

During 2024, the Reserve Fund received a total of \$3.5 million. During this same period, there were no expenditures on the fund resulting in a fund balance on 2024 December 31 of \$63.1 million.

Below is a summary of the Reserve Fund account in 2024:

- | | |
|-----------------------------------|-----------------|
| • Fund Balance on 2024 January 01 | \$ 59.6 million |
| • Fund Receipts | \$ 1.6 million |
| • Fund Investment Income | \$ 1.9 million |
| • Fund Disbursements | NIL |
| • Fund Balance 2024 December 31 | \$ 63.1 million |

Refer to Attachment 2 of this report for a detailed summary of the 2024 Reserve Fund Receipts and Disbursements.

The Reserve Fund for 2025 and Beyond

Future demands on the Reserve Fund are divided into anticipated spending for the current year of 2025, followed by future demand projections for the next four years of the five-year timeframe (2026-2029) and projections beyond the next five years (2030+). These demands total an estimated \$237 million.

The Reserve Fund will hit a critical balance within the next year. Unprecedented population growth and a resulting demand for new schools in recent years will result in the Reserve Fund having an estimated balance of \$15.1 million at the end of 2025. The Agreement requires the Reserve Fund maintain a minimum balance of at least \$15.0 million. Based on current projections, the Reserve Fund will have an unstable balance of approximately \$100 thousand at the end of 2025.

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Timeframe	Estimated Dollar Cost
2025	48.0 million
2026-2029	154.5 million
2030+	34.5 million

It is important to note that these estimates are dependant on population growth and are applicable at the time of writing this report (Attachment 2). Land estimates are subject to change and do not include other fees or expenses that may arise. Future acquisitions require detailed site-specific market valuations and determination of other costs as part of The City's acquisition process. Yearly demands fluctuate depending on the timing of need for land purchase towards a future high school or recreation site, subject to phasing and development timelines of private industry which can change year to year based on population growth. For a more detailed breakdown and itemization of these demands, see Attachment 3. The JUCC prepares an annual plan for required sites and work together to plan for the future.

Strategy for the Reserve Fund Shortfall

Since February 2025 the JUCC has been working together on exploring different strategies to address the projected Reserve shortfall. The JUCC met with building industry partners on 2025 April 17 and additional strategy meetings with interested parties will continue throughout the spring and early summer. Once an agreed upon strategy is developed by the JUCC partners, Administration will return to Council for direction if necessary.

EXTERNAL ENGAGEMENT AND COMMUNICATION

- | | |
|--|---|
| <input type="checkbox"/> Public engagement was undertaken | <input checked="" type="checkbox"/> Dialogue with interested parties was undertaken |
| <input type="checkbox"/> Public/interested parties were informed | <input checked="" type="checkbox"/> Public communication or engagement was not required |

IMPLICATIONS

Social

The JUCC and the Reserve Fund annual report provides transparency with Calgarians to ensure public trust is maintained and ensure that open spaces and school sites are located within communities and available to Calgarians.

Environmental

The JUCC and the Reserve Fund are critical to ensuring that open spaces and school sites are located within communities and available to Calgarians where they live which decreases travel distance, time and greenhouse gas emissions for many Calgarians.

Economic

The Reserve Fund is used to acquire high school. High school sites provide education and employment opportunities which are integral to the economic health of the city as a whole.

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Service and Financial Implications

No anticipated financial impact

There is no impact to The City's operating budget at this point in time as the Reserve Fund is solely funded through cash-in-lieu of reserves dedication payments and used for land acquisition as per the terms of the Agreement.

RISK

Given that the Reserve Fund balance on 2024 December 31 was \$63.1 million and the future demands are projected at \$237 million, the Reserve Fund is deficient. If we cannot develop an effective strategy on how to deal with this deficiency, it will become and more and more difficult to acquire high school and recreation sites.

ATTACHMENT(S)

1. Background and Previous Council Direction
2. 2024 Joint Use Reserve Fund Receipts and Disbursements
3. 2025 and Beyond Joint Use Coordinating Committee Update and Joint Use Reserve Fund
4. Presentation

Department Circulation

General Manager/Director	Department	Approve/Consult/Inform
Debra Hamilton	Planning and Development Services	Approve
Hannah Oh	Law	Inform
Crystal Cote	Finance	Inform
Keath Parker	Parks and Open Space	Inform
Jennifer Symcox	Recreation	Inform
Carol Lee	Real Estate & Development Services	Inform

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