



Non-Profit Affordable Housing Land Survey – July 2018

In May and June 2018, The City of Calgary conducted an online survey of non-profit affordable housing organizations relating to their future land needs. There were three purposes of the survey. The first was to elicit feedback on The City's 2017 non-profit land transfer program. The second was to inform a future strategy for land dispositions to non-profits for affordable housing. Lastly, the third purpose was to gain a general understanding of the affordable housing development pipeline in Calgary.

The survey was live from May 23rd to June 8th, 2018. Efforts were made to maximize participation. **28 eligible organizations completed the survey** out of a total of 78, a participation rate of 35%. **Participating organizations represent 6,255 non-market units or 63% of units that** are not managed by Calgary Housing Company and **were captured through The 2015 Survey of Non-Market Housing**.

Key findings from the survey include:

The City's 2017 Land Transfer Program:

- **84% of respondents were aware of The City's non-profit land transfer program**
- 15% of respondents that were aware of the program applied
- Top areas of satisfaction for applicants include: availability of staff to answer questions, application submission period, program alignment with Canada Mortgage and Housing Corporation's Seed Funding Program and The City's Housing Incentive Program (HIP), and method/ease of submission
- Areas of lower satisfaction include: minimum evaluation criteria, proposed sales terms and The City's response time to award land to successful applicants

Future Plans:

- **86% of organizations reported a desire to increase their supply of units by 2028** through development or re-development
- Respondents identified **72 future projects across 25 organizations** that they would like to undertake from now until 2028
- Respondents identified **a total of 5,251 units** that they would like to create by 2028 (note that units were only estimated for 62/72 future projects)
- Respondents indicated that they have **organizational capacity to execute at least 75% of future projects**
- Respondents estimated **a total cost of \$1.04B** for 60 future projects (no estimate for 12 projects)
- Of the \$1.04B total project costs, **\$172M are confirmed / secured funding**
- **Land is not acquired or identified for over half (58%) of future projects**

- Locational criteria include: proximity to amenities, quadrant/zone, developability, distance from other non-market housing properties, specific sites, and site size
- Target populations include: families, seniors, indigenous, homeless, disabilities, singles, youth/students, newcomers, mental health, sexually exploited women and domestic violence victims
- Development permit submission years were estimated for 51 future projects. The following are the number of projects for which development permits are expected over the next 10 years:
 - 2018-2019: 23 projects
 - 2020-2023: 22 projects
 - 2024-2028: 6 projects

The biggest challenges that organizations identified in increasing their supply include: funding, obtaining funding commitments, land, managing a volunteer board, and navigating the development approval process.

Partnering:

- **86% of organizations are looking to partner with another agency** (private or non-profit) to execute their development/operational goals
- The top qualities sought in a partner are: funding/financing, land and development expertise
- The top qualities that respondents can offer a partner are experience operating or with a target client group and development expertise

Future Engagement:

- **61% of respondents think that this survey is the best way for The City to collect this information annually**, followed by 36% who favored direct one-to-one communication
- 22 individuals provided their email address for follow-up interviews or focus groups

Overall, the findings from the survey indicate that The City's Land Transfer Program is highly valued by the non-profit community. The survey provides a more complete picture of the affordable housing development pipeline in Calgary and identifies some of the key barriers. It shows an interest from the non-profit affordable housing community in partnerships and in continued engagement.

The City of Calgary has a significant shortfall of affordable housing units, with only 3.6% of all housing considered affordable compared to the national average of 6% in other major urban centres. To meet the demand within our City and provide much needed housing to our citizens in need, our inventory must be expanded by an additional 15,000 new affordable units.

The survey results show the requirement of 15,000 new affordable units will not be easily met within the current development plans of Calgary's non-profit sector. It will require the combined development efforts of all non-profit organizations in Calgary as well as significant investments from all levels of government, as well as creative non-traditional solutions. The City is working collaboratively with our entire sector of non-market housing providers to support their development projects. We hope to demonstrate how we are all working together to provide an additional 15,000 new affordable homes to low- and moderate-income Calgarians.