

Calgary



The City of Calgary

Corporate Facility Planning & Delivery Framework

ISC: Unrestricted

Ralph Klein Park



Acknowledgments

This Corporate Facility Planning & Delivery Framework is the result of collaboration across all departments at The City of Calgary and considerable investment of time and resources from many stakeholders. Particular thanks goes to the members of the Integrated Civic Facility Planning Manager Steering Committee for their unwavering dedication to collaboration and championship of this change. This work will allow The City to take an integrated and coordinated approach to how we plan and deliver facilities to support City services now and into the future.

Framework at a Glance

This Framework is the foundational document for the planning and delivery of facilities at The City of Calgary. It outlines the goals and strategic actions that The City of Calgary will pursue in regard to its facility portfolio in order to support service delivery to citizens. It also provides guidance on how these goals can be achieved through governance, process and strategy.

Facility Planning and Delivery Goals: Page 21

The Framework is anchored by six goals that have been developed through cross-corporate collaboration based on Council and leadership direction.



Facility Planning and Delivery Principles: Page 31

The five guiding principles set the foundation for the Framework and guide the implementation of the goals and strategic actions.

- 1 Value for Citizens
- 2 Outcome-Driven & Evidence Based
- 3 Long Term & Strategic
- 4 Integrated & Collaborative
- 5 Consistent yet Flexible

Facility Planning and Delivery Process: Page 33-35

A consistent approach to planning and delivering to achieve goals and maintain line of sight from initial vision to facility delivery.



Watch for
throughout the document



This symbol indicates an example of a case study from another municipality. These case studies, and many others, were referenced to support the development of the Framework.

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Introduction

There is global recognition that the facility infrastructure a city provides goes beyond bricks and mortar and can play an important role in improving outcomes for citizens¹. Recognizing the social, economic and cultural benefits facilities bring to communities, The City of Calgary is taking a new approach for how it plans and delivers its facilities.

In the past, City facilities were often planned independently according to their specific needs and service lines. In 2015, Council and The City's Administrative Leadership Team (ALT) provided direction to begin planning facilities as a Corporation, demonstrating the culture of One City, One Voice, and a more holistic view of The City's infrastructure needs. To support the coordination of facility planning and delivery, Facility Management created the Integrated Civic Facility Planning (ICFP) Program. The ICFP Program was given the mandate to update the Corporate Workplace Framework and Policy, which was developed in 2003 as the foundational document for how facilities are planned and delivered at The City. Since that time, there have been many shifts in The City's workforce, available technology and the organization itself, which have driven the need to update the Framework.

Developed through a collaborative cross-corporate approach, the updated Corporate Facility Planning & Delivery Framework includes input from City departments that rely on facilities as an integral piece of their service delivery. Participating stakeholders include members of Council and The City's Senior Administration. All stakeholders expressed support for the development of a conceptual framework that would integrate The City's long-term facility planning with Council's long-range priorities, One Calgary, and other strategic initiatives undertaken by City departments.

The Framework is designed to support increased efficiencies, partnerships, innovation and investment considerations into the planning and delivery of City facilities, while providing greater value for Calgarians. It outlines the processes, governance structure and strategies to support the integration of facility planning and delivery across The City, working together as a Corporation and in partnership with other public and private organizations. It is a critical first step in the development of a long-range, strategic portfolio plan that will identify what infrastructure should be invested in, divested or redeveloped. The development of the facility portfolio plan and its ongoing management will be guided by the contents of this Framework. This repeatable, evidence-based approach ensures that objectives established in planning are carried through to delivery and secures the benefits that facilities can provide to citizens.

**WE ARE
ONE CITY
ONE VOICE**

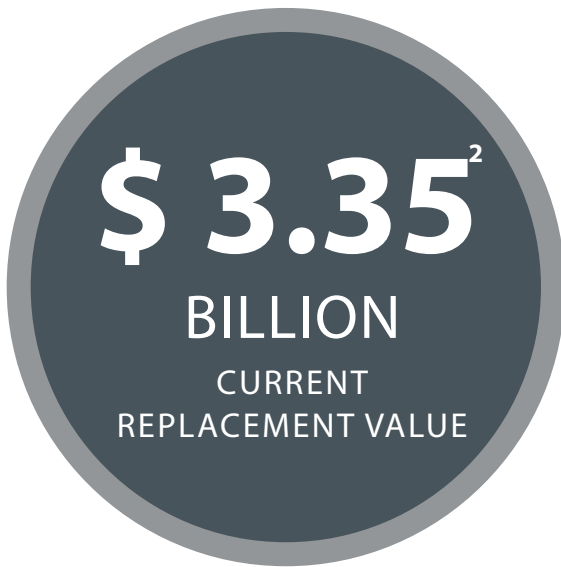
Historic City Hall



The Calgary Context

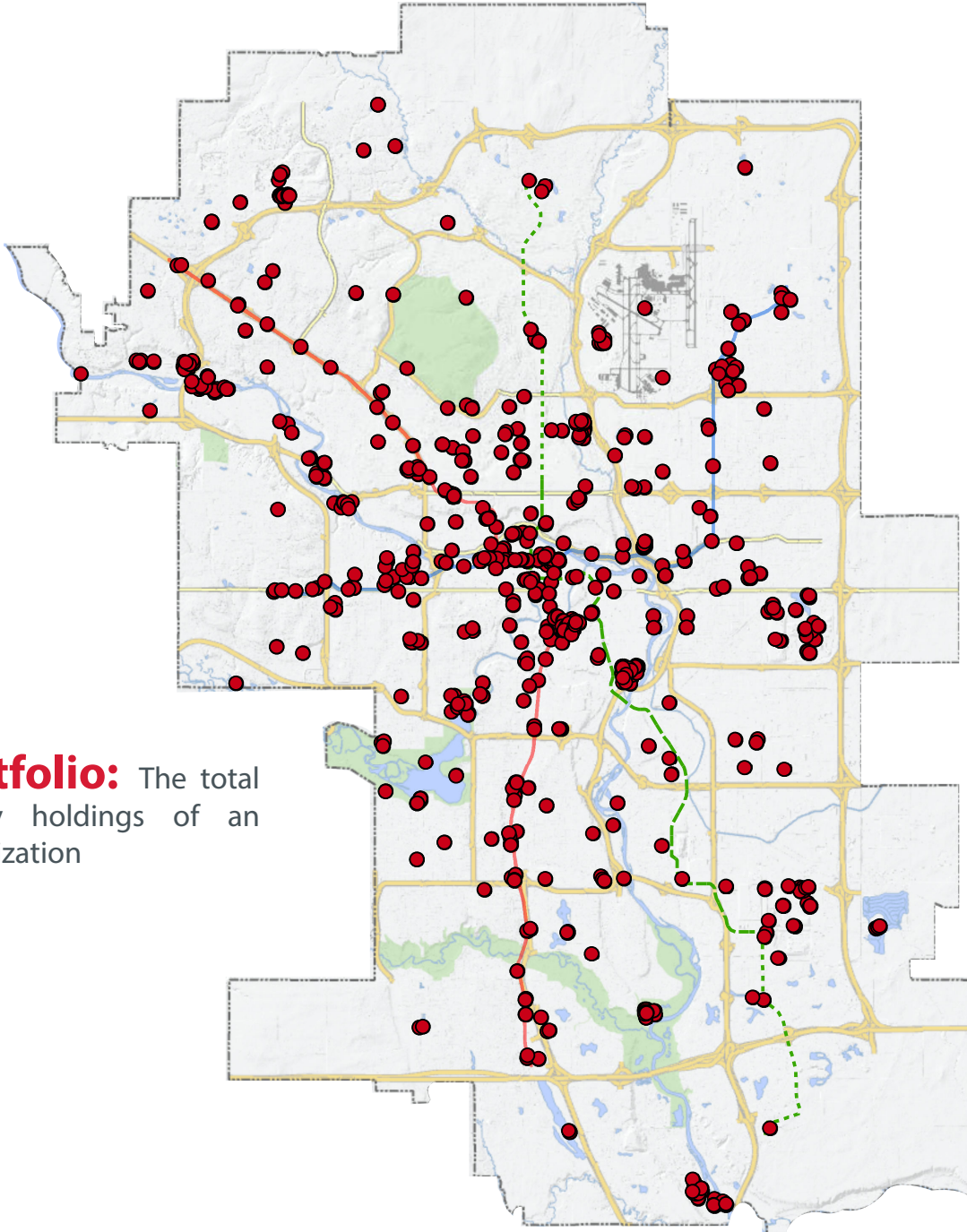
The City of Calgary's Facility Portfolio at a Glance*

Facility: Permanent, temporary or portable building structures



2000⁷
public events held in
City facilities annually





Portfolio: The total facility holdings of an organization

The City's facility portfolio includes hundreds of different facilities with a wide range of spaces that serve distinct functions for service delivery. For the purposes of this Framework, these spaces can be classified into four broad categories:



Workplace Accommodation

Houses administrative functions of The City, including services such as finance, human resources and information technology.



Processing

Houses services that have strict environmental or health and safety regulations and involve the processing of materials such as water and waste.



Community-Facing

Houses services that have a direct interaction with citizens such as aquatics and fitness, arts and culture, and emergency response.

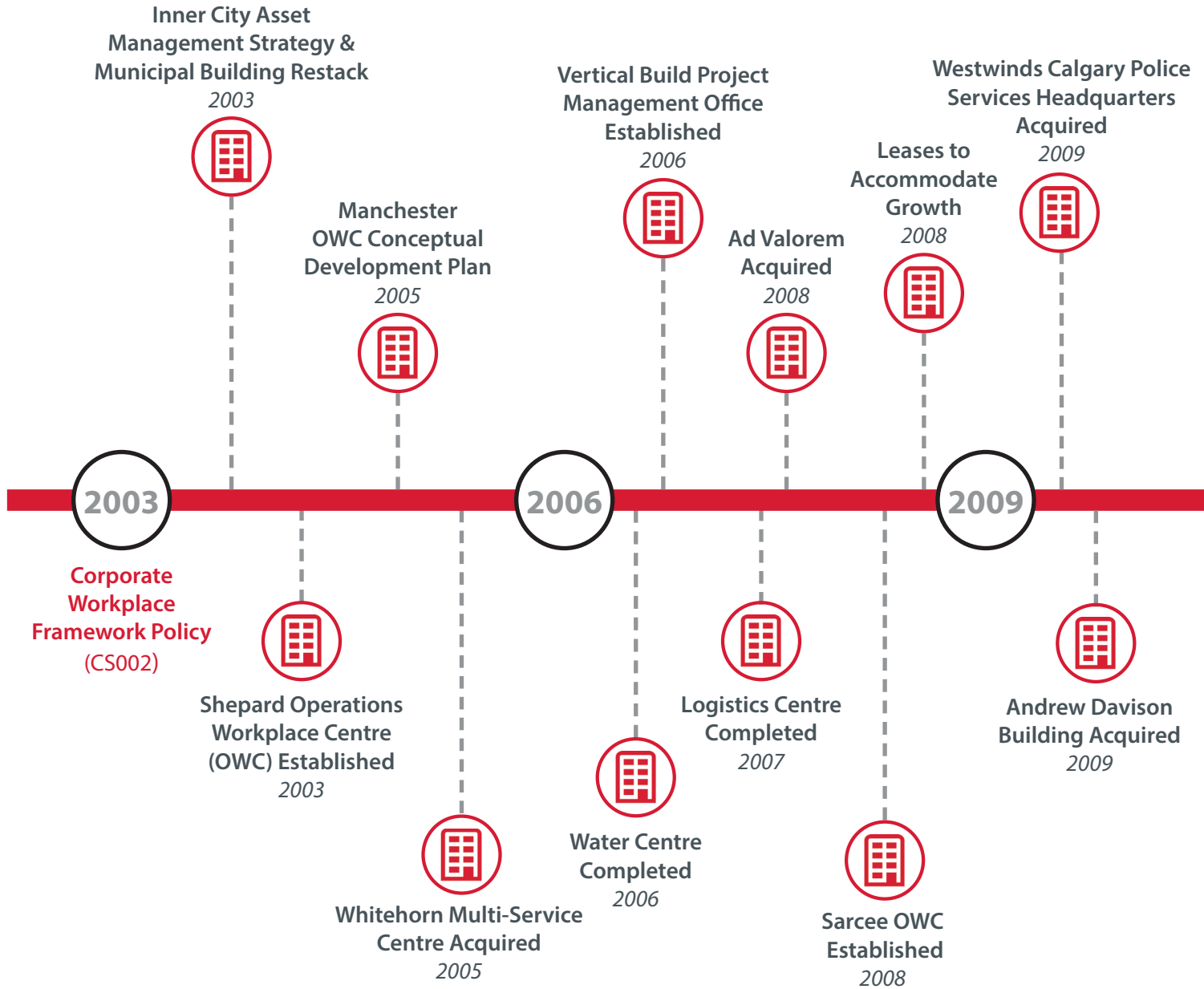


Operations

Houses operational functions of The City including services such as street cleaning, transit, and traffic operations.

Corporate Workplace Framework in Action

The City's Facility Portfolio Since 2003



Technology Milestones

- 2005** Crowfoot Library, Calgary's 1st LEED Building
- 2006** Launch of Facebook
- 2007** Launch of 1st Generation iPhone
- 2011** Rise of the Sharing Economy
- 2013** Creation of WELL Building Standard

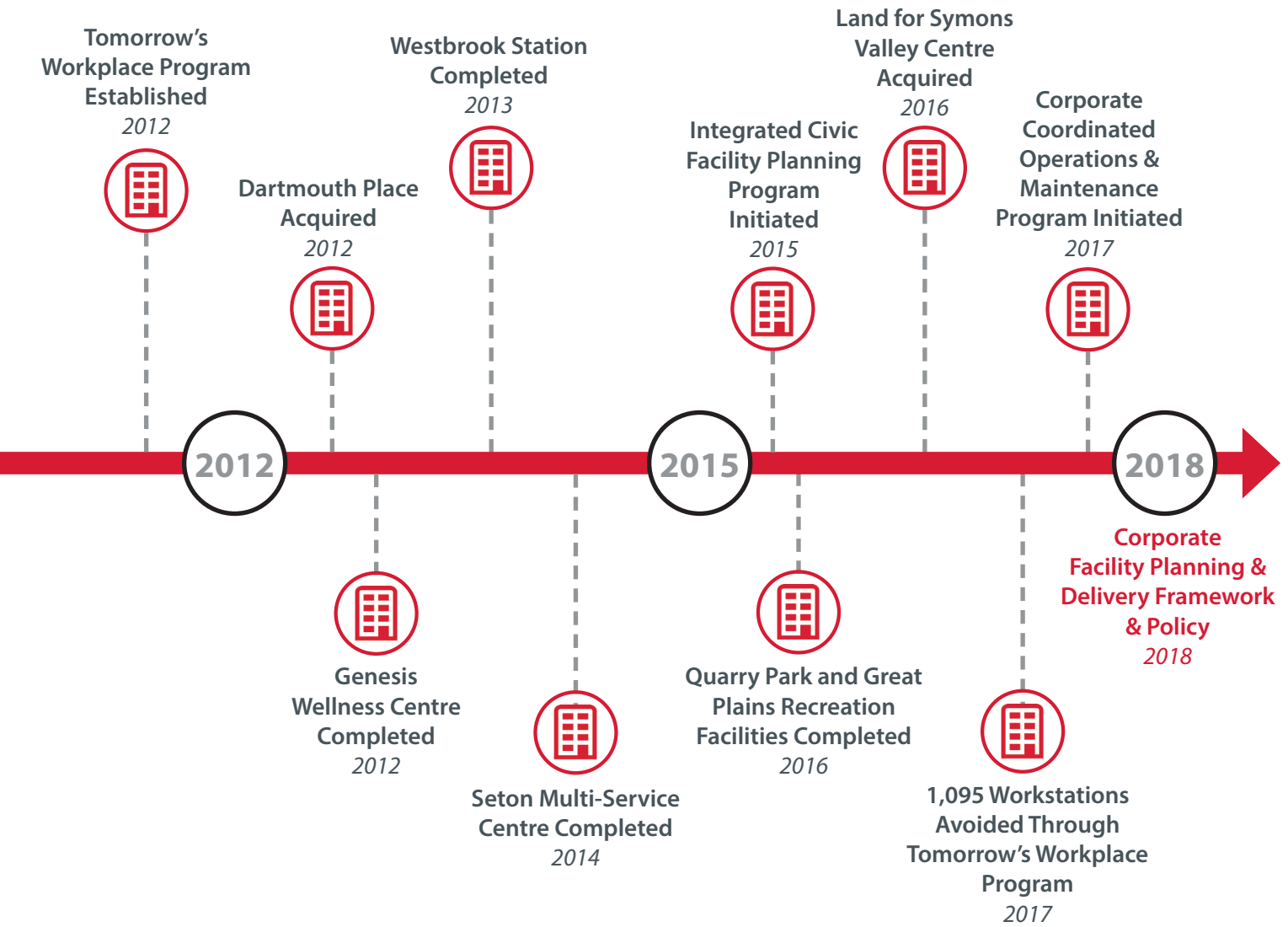


Workforce Milestones

- 2007** Rise of the co-working movement
- 2014** Calgary's lowest office vacancy rate (9.9%)⁹
- 2015** Millennials become largest % of workforce¹⁰
- 2017** Unemployment rate reaches 10.2%¹¹
- 2017** Calgary's highest office vacancy rate (27.7%)⁹



This time line indicates a selection of major activities within The City of Calgary's facility portfolio that were completed under the guidance of the Corporate Workplace Framework Policy that was approved in 2003.



Calgary Milestones

- 2006** Calgary population reaches one million
- 2008** Global financial / economic crisis
- 2012** Bow Building opens
- 2012** West LRT opens
- 2013** Major river flood event

- 2015** Calgary named world's 5th most livable city¹²
- 2015** Oil prices drop / energy industry downturn
- 2016** Calgary admits 21,420 permanent residents¹³
- 2017** Total value of building permits \$4.6 billion¹³
- 2017** Green Line LRT approved

Rocky Ridge Recreational Facility



Vision: **A 40-Year Outlook**

Imagining the Future

City services work together more collaboratively than ever before due to the successful adoption of the Corporate Facility Planning & Delivery Framework during the 2019-2022 business cycle. Implementation of the Framework's goals and strategic actions enables these services to exceed the expectations of Calgary's culturally diverse population. The new practices for integrated facility planning and new approaches to delivering City facilities result in the right infrastructure, a sustainable and resilient portfolio and flexible and adaptable working environments to support the highest levels of service possible.

Applying the Framework across The City's portfolio, has enabled City departments to streamline and re-orient their service delivery models to better reflect the needs and desires of citizens. The City has deliberately placed shared facilities throughout the city, used emerging technology and strategically located City departments in close proximity to the services they provide so that citizens have more choice in receiving services where, when, and in the formats they prefer.

Calgary's population reaches 1.715 million by 2041



The Internet of Things has enabled a function-driven, human-centric user experience for citizens and employees as they interact with the facility portfolio

Facility projects and decisions contribute to shaping Calgary communities and the strategic outcomes of The City, including imagineCalgary and the Municipal Development Plan (MDP). The City has proactively identified gaps in service delivery capacity, and made strategic investment in locations that are community and citizen-focused. City facilities are welcoming to the public and contribute to the urban design of the city. By strategically locating and co-locating services, synergies and economies of scale create savings that are passed on to Calgarians, easing the tax burden while maintaining the infrastructure needs of our dynamic city and its changing population.

Learning Projects implemented during the development of the Corporate Facility Planning & Delivery Framework provide benefits to the community and The City. Building on lessons learned from these projects, and by identifying opportunities to work with the private sector, several shovel-ready projects have been lined up with developers, many that align with The City's Transit Oriented Development (TOD) strategy.



The Green Line opens in 2026, further connecting south east communities with the rest of the city



Increased automation of transactional tasks has shifted the workforce to knowledge-based work

Although Calgary’s demographics and The City’s workforce continue to shift, facilities are more flexible and adaptable to accommodate these kinds of changes. The collaborative and flexible workplace environments, combined with the workspaces and technology that enable City employees to stay productive, have further established The City as one of the most desirable places to work in Calgary. The City’s workplace infrastructure is planned to accommodate future growth and employees feel safe, happy and comfortable in their functional and flexible surroundings.



The increased use of renewable energy and the rise of Smart Buildings have made City facilities efficient and sustainable.



70% of the world’s population live in cities by 2050, as people seek compact, convenient, transit-oriented urban living

An understanding of service requirements from across the organization, in context of solid and trustworthy supply information, has enabled the creation and ongoing management of a Portfolio Plan. This planning allows The City to optimize the portfolio, make strategic land purchases and build a long-term view of asset management based on a coordinated corporate direction. Program plans have been developed for multi-service facilities in strategic locations across the city and several mixed-use facilities have been opened that feature service lines including Fire, Affordable Housing, Permit counters, as well as workplace accommodation spaces. In addition, advanced planning has created opportunities for The City to partner with other civic services like the Calgary Public Library, Alberta Health Services and local school boards to create service centres that meet a broad range of citizen needs.



CASE STUDY: SOCIAL HOUSING + MULTI-SERVICE Osdorp Mixed-Use Centre & Housing¹⁴ Amsterdam, Netherlands

Project Overview: Part of a larger urban renewal project, this mixed-use facility redeveloped the existing affordable housing in the area and integrated additional social, educational and health services in a largely lower-income, new immigrant dense community. The primary services offered include:

- Pre-school and elementary school
- Social housing
- Rentable classrooms that serve as community space
- Sports facilities & gym
- Community kitchen
- Child care
- Indoor & outdoor gathering places

Lessons Learned:

Relationships and collaboration between different government functions:

- Early planning and collaboration was essential to project success
- Both internal and external collaboration is key for complete communities

Co-location of affordable housing and other civic services:

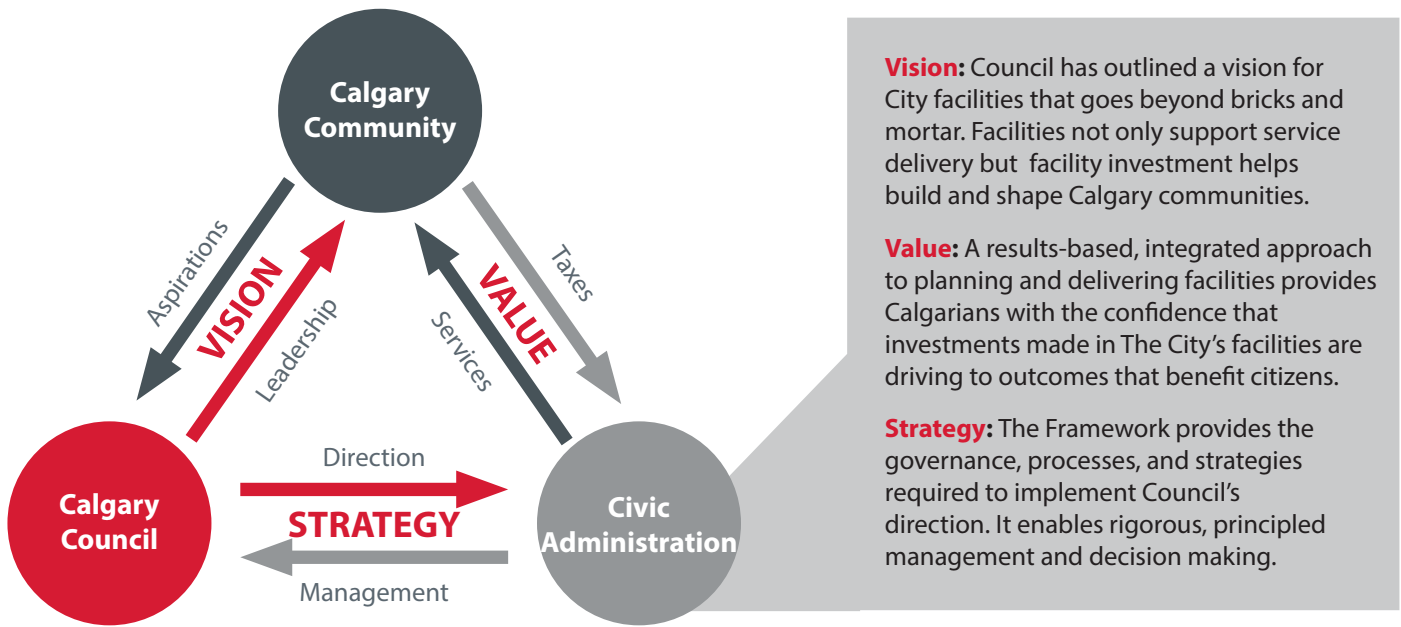
- The community has greater accessibility to services
- Revitalization of the area and transit oriented development is supported
- Efficiencies for ongoing facility and service operations are realized



Supporting the Corporate Vision

For The City of Calgary, facilities support the efficient and effective delivery of services to citizens and the collective vision of Calgary as a great place to make a living, a great place to make a life. The City of Calgary delivers on this vision through a culture of One City, One Voice, and the guidance from The City’s Accountability Model and Council’s Guidelines for Administration. The Corporate Facility Planning & Delivery Framework is aligned with these in the following ways:

City of Calgary’s Accountability Model



Council’s Guidelines for Administration¹⁵

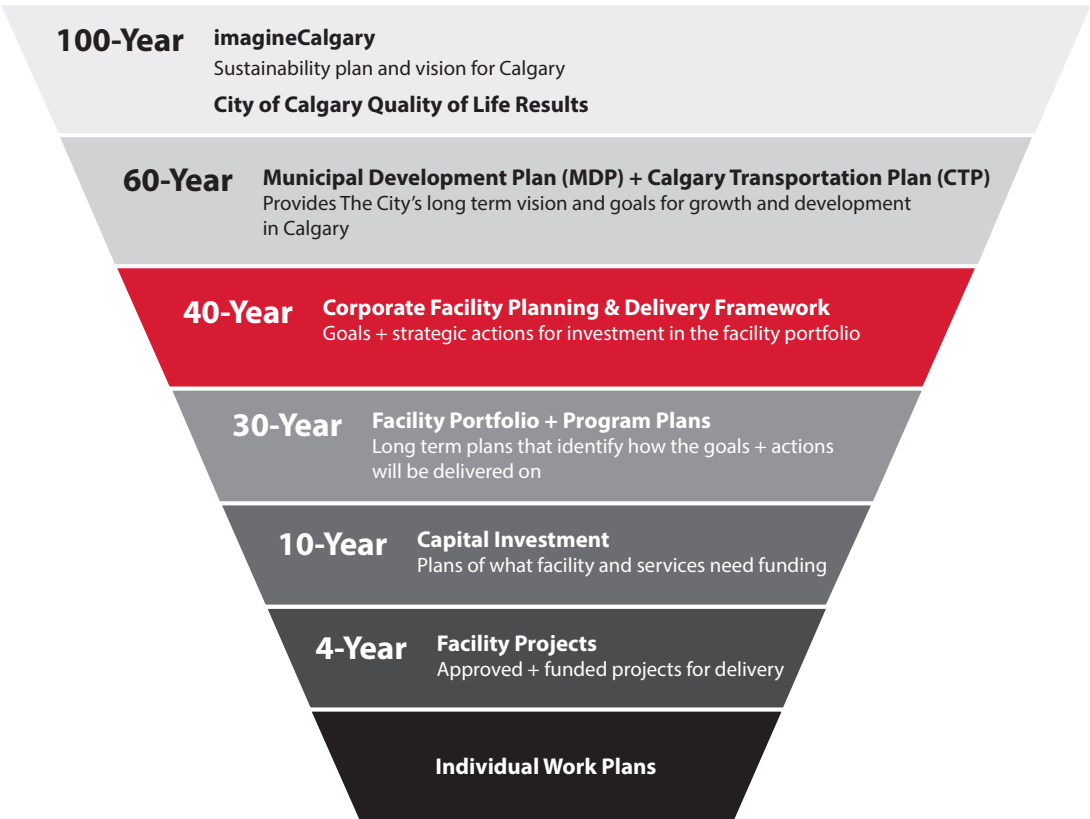
Integrated Service Delivery	Collaborative approaches bring service owners together to plan, enabling the opportunity for multi-service facilities to support integrated service delivery to citizens.
Engaged Leadership	A collaborative governance model brings expertise from across service lines to participate in decision making that supports the needs of the service and the strategic objectives of The City.
Trust and Confidence	A transparent, industry-based, repeatable, and principled approach to facility planning and delivery builds confidence with decision makers and potential partners, both public and private.
Investment and Value	A process is designed to define value early on and establish measures that provide the guideposts for ensuring the best value for capital investment in the facility portfolio.
Cooperative Alliances	A governance model supports the effective stewardship of City assets through internal coordination, while allowing collaboration with external partners, both public and private.

Strategic Alignment

Relevant City plans, policies, and strategies were reviewed to ensure the Framework’s goals, actions and strategies were based on Council-approved policies and aligned with The City’s long-term strategic direction. Primary ones included:

ImagineCalgary	All goals and strategic actions (pg 22) are directly tied to 15+ ImagineCalgary targets.
Municipal Development Plan	Goal to support Complete Communities (pg 26) and efficient and effective service delivery (pg 22).
Calgary Transportation Plan	Strategic actions to provide City services in transit oriented development (TOD) zones (pg 26)
City Shaping Framework	Facility Portfolio Planning (pg 34) plans for providing spaces and programs in alignment with the City Shaping Framework.
Calgary Affordable Housing Strategy	Strategic actions to provide affordable housing in multi-service facilities (pg 26).
10-Year Economic Strategy	Strategies that support collaboration with the private sector, prepares more projects for funding, and leverages investment to make Calgary an attractive place to live.
Cultural Plan for Calgary	Actions that support the outcomes of the Cultural Plan (pg 24, 25).
Engage! Policy	Goal, strategic actions (pg 24) and process (pg 34) identifies public engagement as a core input to facility investment decisions.
Preliminary Resilience Assessment	Goal and actions that support a resilient portfolio (pg 25).

As a long-term directional document, the Corporate Facility Planning & Delivery Framework has been structured to be flexible and functional to support The City for the next 40 years.



Spring Gardens Administration Building



Value: **An Integrated Approach**

Working Together Flexibly

The Framework is based on the premise that all City of Calgary facilities are planned in collaboration across all City services. This enables the organization to avoid redundancy and duplication of efforts, increase economies of scale, and ensure that all facilities are considered under a consistent set of goals, and the same planning and delivery principles.

In addition to collaboration and integration, flexibility is critical. The flexibility of the portfolio means that planning is able to consider a multitude of different combinations of services and space types (Operations, Processing, Workplace Accommodation or Community-Facing) to deliver on service requirements and achieve goals. By working together flexibly, The City can:

1. Take a comprehensive, portfolio view to optimize facility assets
2. Determine what services could co-locate for greatest service and citizen benefit
3. Assess when a single-use or multi-service facility is most appropriate

Integration and collaboration require that all parties agree to the goals and principles by which they will work together. The remainder of the Framework, developed in collaboration with representatives from across The Corporation, outlines this agreement.



CASE STUDY: BUILDING COMMUNITY

Churchill & District Intergenerational Community Hub¹⁶
Churchill, Australia

Project Overview: A multi-service facility on a local scale, comparable to many of Calgary's neighbourhoods. The facility includes the following services:

- Maternal / child care / daycare
- Municipal service counter
- Pre-school
- Municipal library
- Adult education programming
- Indoor / outdoor community meeting space
- "Hot offices" for employees and community members

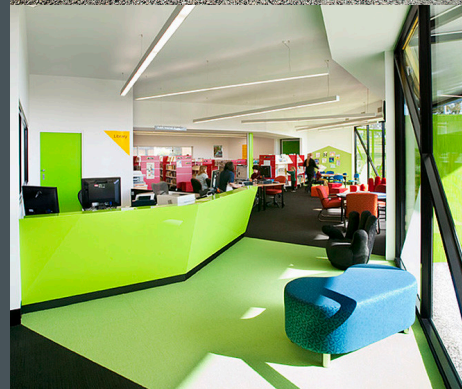
Lessons Learned:

Importance of civic partnerships and anchor tenants:

- A collaborative process with a clear vision was critical to align partners
- Leveraging a strong anchor tenant was key to driving activity to the site
- Community engagement can help guide business cases and partnerships

Attention to design is a factor of success:

- Strong design enabled the integration of services and operations
- The facility is flexible to accommodate future uses and evolving service needs
- The facility is a vibrant focal point of the community



Goals

The goals of the Framework guide all facility decisions made at The City of Calgary. They are linked to each other and centered around the facility portfolio's core role: supporting the efficient and effective delivery of services to citizens.

On the following pages, each goal is listed with corresponding strategic actions. These actions can be leveraged on projects as appropriate in order to achieve their respective goal. These are not exhaustive lists of actions, but rather, respond to specific Council and leadership direction or provide guidance on how best to achieve the goals. By employing the strategic actions and striving to achieve these goals on all facility planning initiatives, The City will realize superior service delivery outcomes and be flexible to changing needs.

Goals of the Corporate Facility Planning & Delivery Framework



Goal 1: Efficient and Effective Service Delivery



City of Calgary facilities are planned to support the efficient and effective delivery of services to citizens. Supporting service delivery is the central goal of the Corporate Facility Planning & Delivery Framework, and all other goals support and enable facilities to deliver services where, when, and how citizens need them.

ACTIONS IN ACTION



Sage Hill Pop-Up Library

45,841

Number of people who have visited the pop-up library since opening in June 2017

69,099

Number of books checked out since opening

Action

The Calgary Public Library leased space for a pop-up library during the development of the Symons Valley Centre.

Community Benefit

Library services were available to the community 48 months in advance of the full development of the Symons Valley Centre.

Strategic Actions

Plan facilities collaboratively across all service lines.

Develop facilities with flexibility to respond to evolving City services.

Co-locate compatible City services to improve integrated service delivery.

Use service targets and factors such as population, transportation infrastructure, and demographic changes as triggers for facility infrastructure development.

Lease spaces from third parties to meet short term service needs when greater outcomes can be achieved through long-term facility and site development.

Develop an evaluation model to illustrate progress towards administrative and legislative service targets and continuously improve the ability for facilities to respond to service delivery needs.

Goal 2: Reduced and Avoided Costs


The City of Calgary plans its facility portfolio with the objective of achieving the best value for money while demonstrating value to citizens.



Strategic Actions

- Manage the facility portfolio on an ongoing basis to identify opportunities to optimize facilities and reduce the total cost of ownership.
- Plan for the timely disposition of assets that no longer meet service needs or are at end of life.
- Increase utilization of facilities through planning and design to maximize value of the asset.
- Plan and build facilities in partnership with the private sector when appropriate to share both risks and benefits.
- Co-locate compatible City services to reduce costs by standardizing and sharing spaces and building systems.
- Lease spaces in City facilities to generate revenue and offset costs where there is a public benefit or where a future need for space is planned.
- Plan projects in advance of capital budget requests to capitalize on grant and funding opportunities from other levels of government or the private sector.
- Evaluate options such as leasing, building, renovating, and purchasing to make the best use of public funds.

ACTIONS IN ACTION



Operations Workplace Centres Portfolio Plan

10 OWC sites that support the service needs of Roads, Parks, Supply, Fleet, and Transit, among others

60% OWC buildings in poor condition in 2018

Action
To support sustainable funding for OWCs, a 10 year plan is in development that will focus on optimization.

Service Benefit
Advanced planning leads to reduced risk and more funding options. Critical services are supported by facilities over the long term.

Goal 3: Citizen Focused Facilities

City of Calgary facilities are planned and designed with the citizen front of mind to support how they receive services, how they interact with facilities in their communities and how facilities contribute to quality of life.



ACTIONS IN ACTION



New Recreation Facilities Project:
Rocky Ridge, Great Plains, Quarry Park, Seton

11

Number of engagement opportunities provided for the community

4

Number of new facilities developed

Action

Each of the facilities are distinctly designed to reflect the needs of the surrounding community.

Community Benefit

The facilities provide great spaces to play, learn, grow and connect and are critical for developing active, cultural, vibrant and complete communities.

Strategic Actions

Engage citizens to create spaces and places that work for their communities.

Plan facilities by collaborating across The Corporation to understand how citizens want to access services.

Consider demographic changes in the long-range planning of the portfolio to meet future needs of citizens.

Evaluate proposed changes to the portfolio based on impact to citizens.

Develop facilities with flexibility to respond to changing needs of citizens.

Locate and co-locate City services with other services to provide better access and convenience for citizens.

Design City of Calgary facilities so they are easily recognizable to citizens.

Include publicly accessible outdoor spaces such as parks and plazas on City sites.

Create publicly accessible indoor spaces and multi-purpose rooms for use by community groups where needed.

Partner with other levels of government and community groups to enhance the usability of facilities for citizens.

Goal 4: A Resilient Facility Portfolio

Future planning for the facility portfolio will contribute to the economic, environmental, social, and cultural resiliency of Calgary.



Strategic Actions

Evaluate the operational impact of increasing portfolio size on service delivery, facility operations and operating budgets.

Generate revenue from leased spaces to fund the operations of community amenities such as plazas, community rooms, etc.

Plan in advance so shovel-ready projects are ready when funding becomes available.

Develop facilities with flexibility to respond and adapt to changes in City services and maintain service continuity.

Locate and co-locate City services so that business continuity is supported during planned and unplanned events.

Work with the Calgary Emergency Management Agency to plan facilities in locations that minimize impacts from natural and human-initiated disasters.

Plan and deliver facilities and sites that contribute to the environmental well-being of Calgary.

Use facilities to reflect the culture of the community and address issues directly impacting the community.

ACTIONS IN ACTION



Emergency Operations Centre

40

Approx. number of times the Emergency Operations Centre has opened since 2012

4824

Square metres

Action

The City of Calgary co-located multiple services and critical infrastructure to a new, highly effective EOC.

Service Benefit

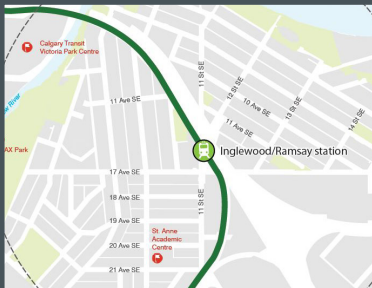
This award-winning facility is resilient to environmental impacts and protects critical infrastructure to support business continuity and citizen safety.

Goal 5: Complete Communities¹⁷

City of Calgary facilities contribute to the Municipal Development Plan (MDP) objective of Complete Communities by aligning facility planning and delivery with city growth and community planning objectives in new and established communities.



ACTIONS IN ACTION



Inglewood-Ramsay Green Line City Shaping

28

Planned units of affordable housing above a Fire Station adjacent to a Green Line station

Exploring opportunities of working with private sector on other development

Action

Integrated planning is underway for a multi-use facility at a TOD site that will support Complete Communities.

Community Benefit

City Shaping initiatives are achieving long-term goals of equity and improving social well-being.

Strategic Actions

Plan facility sites within the context of the surrounding community to support the aspirations of updated City of Calgary planning and cultural documents, both statutory and visionary, including the MDP and imagineCalgary.

Plan, develop or redevelop City facilities in major community activity centres.

Improve vibrancy of city streets by designing City facilities that contribute to dynamic and activated street fronts.

Plan facilities along the primary transit network to support increased ridership, transit use, and the growth of Transit Oriented Development.

Enhance communities through good design and consideration of environmental, cultural, and community context.

Locate and co-locate City services with other services to diversify the amenities available in communities.

Consider opportunities to create space for other private or non-profit businesses and services that are required in the community (e.g. child care, retail space, etc.).

Where possible, include affordable housing in multi-service facilities.

Develop partnerships with school boards and other public entities to share services and spaces.

Goal 6: Enhanced Employee Experience



Facilities developed by The City contribute to the well-being and performance of City of Calgary employees by focusing on health and safety and proactive planning for the evolution of work practices, technology, and the changing demographics of the workforce.

Strategic Actions

Locate and design facilities to support an employee's ability to provide service to their customers.

Ensure health and safety of citizens and employees is a primary factor in facility decision making.

Provide options for how and where employees work, considering work location and workstyles.

Provide spaces to support a collaborative and dynamic workforce.

Increase the indoor environmental quality of City facilities to improve employee well-being.

Consider adjacency of services and functions to allow for efficiencies.

Locate facilities to provide employees with multiple modes of transportation to work and between work sites.

Develop facilities that represent and support The City of Calgary's corporate culture.

Collaborate with Information Technology to provide spaces and technology that support employee productivity.

ACTIONS IN ACTION



Flexible Work at The City
(Tomorrow's Workplace)

530

Number of shared mobile workstations in City facilities (as of 2018)

15,000

Number of visits to the Flexwork Hub in the opening year

Action

The City's workplace strategy is focused on providing choice and flexibility for employees.

Service Benefit

Employee satisfaction increases as they have the ability to choose where they work. The City can grow without growing by creating flexible work environments.

Water Centre



Strategy: **Managing the Portfolio**

Components of Effective Management

The shift to coordinated planning and delivery of all City of Calgary facilities requires more than vision. In order to successfully navigate the complexity of the organization and the diversity of service lines within it, a set of guiding principles and three supporting components have been developed: Governance, Process and Strategies. These component parts provide the “how” of the Framework and support Administration in the ongoing and effective management of the facility portfolio.

GOVERNANCE

When and how are decisions made?
 What information is required?
 Who is accountable?



PROCESS

How do stakeholders work together? What is the consistent method that is flexible to changing strategy and outcomes?



STRATEGIES

What levers are available to achieve the Framework goals?



CASE STUDY: WORKING WITH DEVELOPERS King & Victoria Multi-Modal Transit Hub¹⁸ Kitchener, Ontario, Canada

Project Overview: As a large-scale transformational project, this combination of public infrastructure and private development features:

- VIA and GO rail station
- Local and regional transit terminal
- LRT station
- Market residential
- Public and private office space
- Restored historical building
- Retail and public parking
- Outdoor public spaces

Lessons Learned:

Importance of long-term planning and vision:

- Time allowed internal stakeholders and needs to be discussed fully
- External stakeholders were clear on the vision and municipal needs from the onset

Requirements of working with a developer:

- Understanding of profit and market potential helped define desirability for partners
- Clarity of scope, vision and government funding created certainty
- Long-term leases and government funding secured a return on investment



Guiding Principles

The guiding principles set the foundation for this Framework and guide the implementation of the goals and strategic actions.

Principle 1: Value for Citizens

Planning for the facility portfolio will focus on value for citizens through the ongoing optimization of the portfolio. This will ensure The City is delivering the right assets at the right time to meet service needs, maximizing the utilization of asset holdings, and disposing of surplus assets in a timely manner to reduce operational and maintenance costs.

Principle 2: Outcome Driven & Evidence-based

Facility decisions will be driven by outcomes that directly relate to the goals outlined in the Framework. Evidence-based decisions should be made to support the best and highest use of City facilities through appropriate benchmarking and data collection based on professional facility management industry measures and an evaluation model that supports ongoing management and continuous improvement.

Principle 3: Long-term & Strategic

Planning will be proactive, long-term and strategic to establish a vision for the facility portfolio and ensure projects are aligned with that vision over time. This simplifies decision making, allows The City to estimate budgets more effectively, and creates certainty when working with private sector partners and other levels of government. Long-term planning will be coupled with short- and mid-range plans that respond to the changing needs of The City and citizens.

Principle 4: Integrated & Collaborative

Facility planning and delivery will be coordinated with internal and external stakeholders to leverage resources, capitalize on the range of expertise available, and meet corporate objectives. An integrated approach to facility planning and delivery means City of Calgary services will coordinate budgets and resources to create efficiencies in the provision of services to citizens.

Principle 5: Consistent yet Flexible

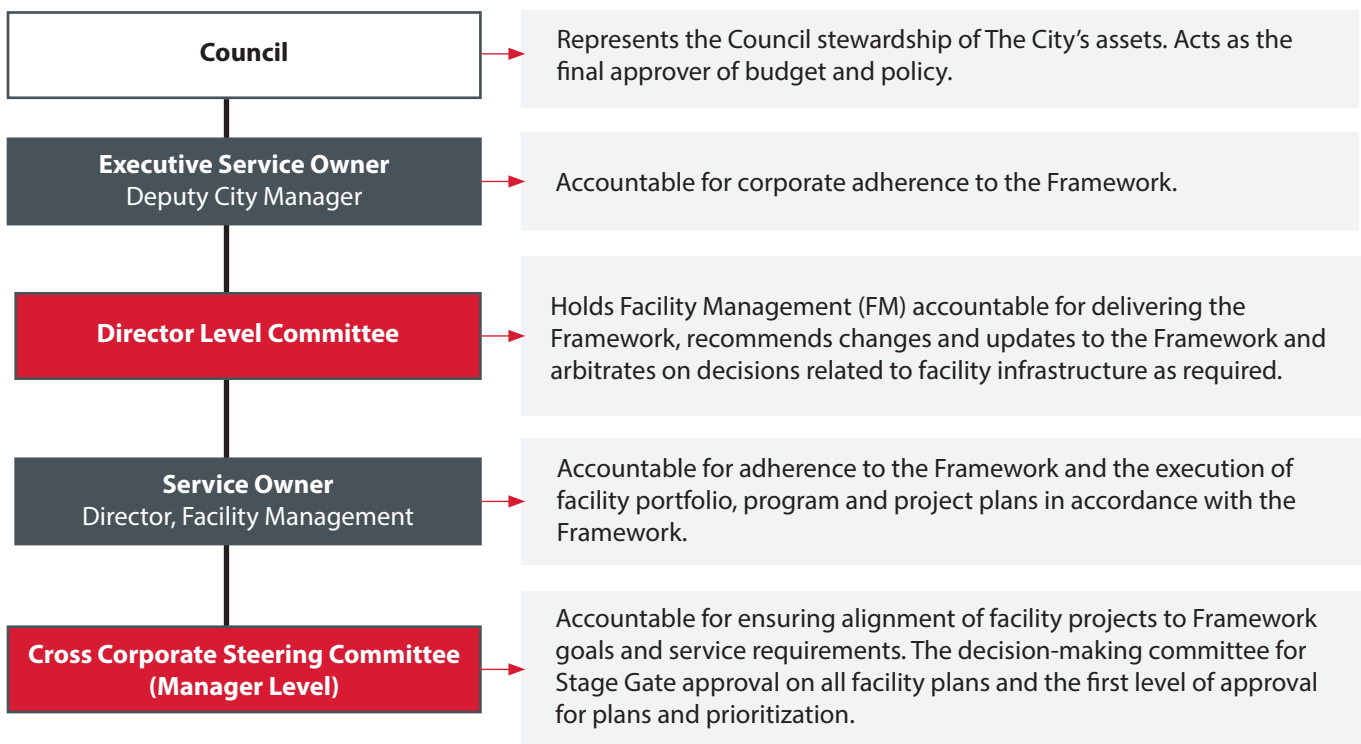
The City of Calgary will follow a consistent and repeatable process for how analysis is done and decisions are made. Systematic processes allow The City to better manage risk, make better investment decisions, create clarity around roles and responsibilities to reduce redundancies, and make The City a better partner for the private sector. Processes will also allow for flexibility to respond to rapid technological, societal and organizational changes.

Governance

Governance is a critical factor in the success of integrated facility planning and delivery. Governance bodies make strategic facility portfolio, program and project decisions to ensure opportunities and risks are well managed and aligned The City's vision and priorities as well as service plans and budgets. Having clear accountability and transparency around who, how and why decisions are made creates efficiencies and speeds up the decision making process.

The governance structure that has been developed as part of this Framework is cross-corporate, enabling all City of Calgary service lines to have representation and be involved in a collaborative planning process. The objective of this model is to manage the balance between corporate strategy and outcomes, and the effective and efficient delivery of services to citizens.

Corporate Facility Planning & Delivery Governance Model



This model enables

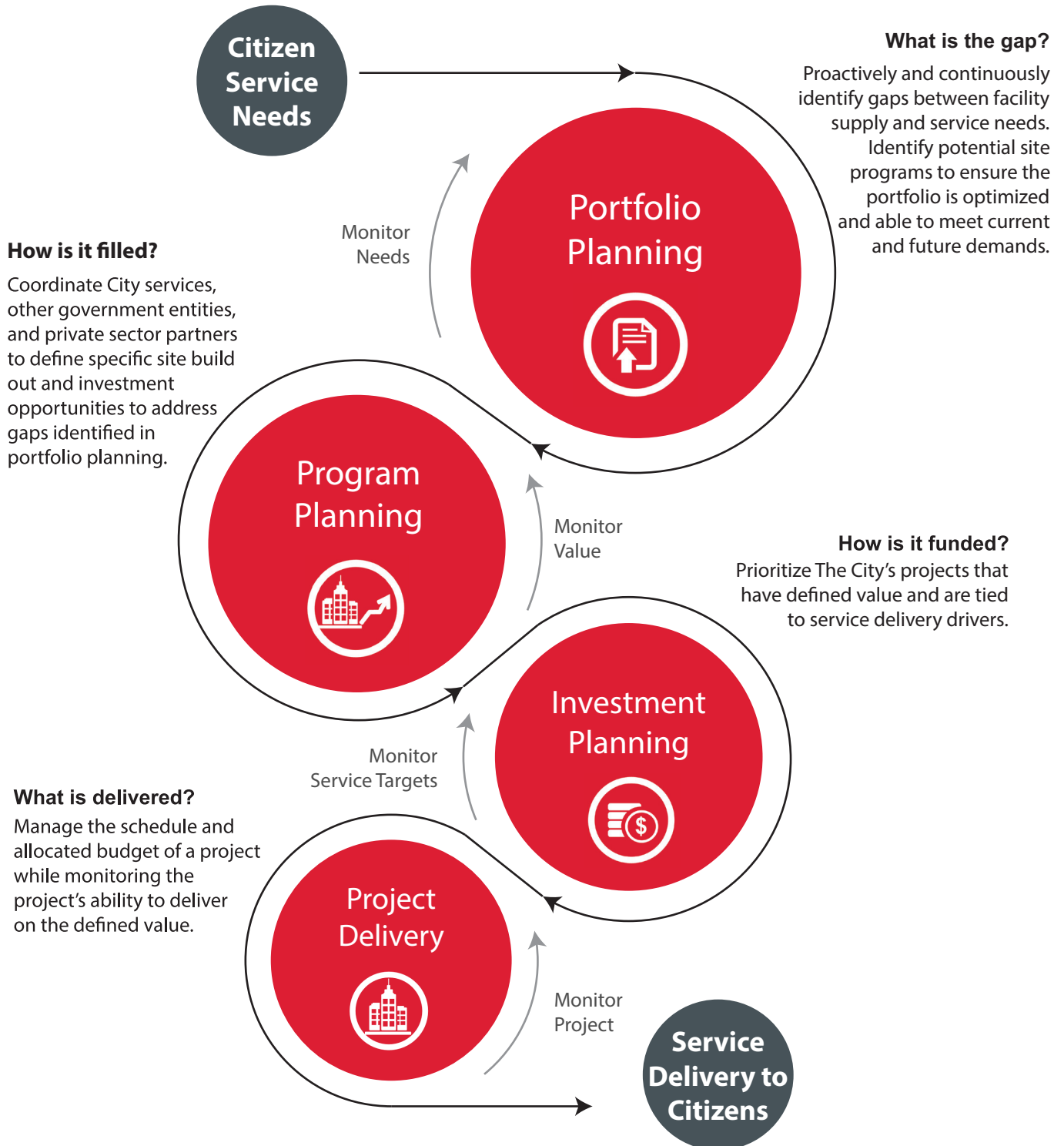
- A portfolio view of The City's facility assets
- A forum for discussions across the organization
- More transparency with approved performance measures
- Clear accountability and delegation for faster decisions
- Flexibility to respond to changing direction
- Interdisciplinary teams to deliver on goals
- The inclusion of external stakeholders (e.g. regional planning, other levels of government, civic partners)






Process

A consistent approach to planning and delivering facilities is necessary to achieve the goals and principles within this Framework and maintain line of sight from initial vision to when the facility is delivered. The process is not always linear and it refines City objectives and service requirements through planning at various scales: city wide (portfolio), site specific (program) and the investment required to deliver (project).

The diagram below shows the cyclical nature of the process with the following pages providing more detail on each component part.



How the Process Works

Process	Portfolio Planning	Program Planning	Investment Planning
			
Output	Facility Portfolio Plan	Facility Program Plan	Facility Investment Plan
What is it?	A city-wide view of the facilities The City has and needs. Identifies and recommends how to fill the gap by building, renovating, demolishing, selling, and/or leasing over the long-term. The portfolio is continuously monitored and adjusted to obtain value and meet service needs.	A site-specific master plan that outlines The City's long-term vision for a site, how and when it will be built, what and when services will be provided and how the site will be operated.	A comprehensive list of projects that are required to support service delivery along with service triggers that identify when it is best to provide funding.
Planning Horizon	1-30 Years	1-20 Years	1-10 Years
What is being done?	<ul style="list-style-type: none"> • Setting the long-term vision for the facility portfolio and sites • Identifying gap between supply and demand • Identifying appropriate locations for service delivery • Identifying what facilities should be multi-service or single-use • Identifying City requirements before funding is requested 	<ul style="list-style-type: none"> • Developing a site masterplan • Developing a phased implementation plan • Establishing partnerships with levels of government and the private sector for construction, funding, and operations • Setting out terms of partnership and agreements for the delivery and operations of a site 	<ul style="list-style-type: none"> • Corporately prioritizing facility investment • Advocating to other levels of government and private sector for funding • Efficiently and effectively managing capital funds
What is the result? Why does it matter?	<ul style="list-style-type: none"> • Capital cost efficiencies through shared land and space • Economies of scale by planning for multi-service facilities • Harder working facility infrastructure that supports multiple City outcomes • Maximized land value and ability to work with the private sector early in the process • Council has opportunity to provide input into vision 	<ul style="list-style-type: none"> • Shovel-ready projects planned in advance of funding • More accurate cost estimates • Site phasing to achieve larger vision, support service delivery and respond to funding availability • Ability to work with regional partners and other levels of government • Council and community have the opportunity to provide input 	<ul style="list-style-type: none"> • Right projects funded at the right time based on service need and service triggers • Ability to respond to federal and provincial funding when available. • Ability to advocate for new public and private funding sources • Reduction in risks to partnerships with private sector

Project Planning



Facility Project Charter & Plan

A project charter and detailed plan that outlines the best approach to delivering the project on time and on budget.

Project Design



Drawings & Specifications

Facility designs that meet the functional requirements of City services, align with the Municipal Development Plan, and support The City's urban design objectives.

Project Delivery



A Completed Facility

The construction of a facility that supports the delivery of City services and contributes to the goals outlined in the Framework.

1-5 Years

- Setting up the project manager and team to successfully manage the scope, budget and schedule of the project
- Determining delivery options: internal or private sector
- Establishing project governance

1-5 Years

- Defining a facility's functional program in collaboration with all stakeholders
- Designing to support site vision, service delivery and operations
- Adhering to design standards and specifications

1-5 Years

- Delivering quality facility projects on time and on budget
- Establishing quality controls

- Agreement and alignment with stakeholders to streamline decisions
- Well-managed procurement to deliver the project
- Identification of other mechanisms for project delivery other than construction (i.e. real estate transactions)

- Effective space to deliver efficient services
- Standards and specifications to streamline partnerships and allow developers to deliver City facilities
- More efficient operations of facilities through standardized design

- Expectations are managed through transparent project management processes and standards
- Budgets and time are well managed through project monitoring and controls

Strategies

A series of strategies have been developed that tie to the Framework goals and illustrate how The City will deliver on the strategic actions. Each strategy has been developed with a set of principles, decision making criteria, strategy governance and dependencies to support implementation. The strategies are intended to provide a principled approach for which to analyse, recommend and govern actions on a given project. The appropriate strategy or combination of strategies will be employed to achieve the Framework goals on individual facility projects.

As technology, the environment, Council direction, and the needs of citizens change over time, strategies will be adjusted or new ones developed. The Framework allows governance and process to respond in a consistent way even as strategies shift. Below are a selection of strategies and their intended objectives:

Location	<ul style="list-style-type: none">• Identify the optimal locations to support service delivery• Determine long-term strategic locations for The City
Co-Location	<ul style="list-style-type: none">• Identify co-location clusters• Identify what services need to and can go together• Determine whether multi-service or single-use is most appropriate
Renewal and Disposition	<ul style="list-style-type: none">• Identify facilities that no longer meet service needs• Reduce overall total cost of ownership• Determine whether to replace, renew or dispose of facilities
Developer Funded and Delivered Facilities	<ul style="list-style-type: none">• Identify facilities that could include private uses• Identify when developer involvement could enhance an opportunity• Identify where The City can contribute to investment in a location
Strategic Acquisitions and Holdings	<ul style="list-style-type: none">• Identify when a strategic acquisition for a facility is appropriate• Determine the feasibility of strategic acquisitions
Leasing Versus Owning	<ul style="list-style-type: none">• Determine when to lease and when to build facilities• Determine when leasing contributes to a larger outcome
Generating Revenue Through Leasing	<ul style="list-style-type: none">• Identify where it is appropriate to have spaces for lease in facilities• Identify where public benefit can be created
Urban Design	<ul style="list-style-type: none">• Outline the importance of design in City facilities• Define how The City supports good urban design
Workplace	<ul style="list-style-type: none">• Define how The City plans its workplace and supports employee productivity• Determine how office space will be managed

Proof of Concept: Thornhill Civic Centre

Vision: The existing facilities were no longer meeting the needs of the growing community. This vibrant, mixed-use community hub will enhance citizen quality of life, expand service delivery, contribute to avoided operating and capital expenditures, and compliment the vision of the upcoming Green Line TOD. Community collaboration provided input into proposed services including Recreation and outdoor spaces, retail, child care, health services, library, etc.

Value: Critical information gathering and planning has been completed in advance of the TOD time line. Exploring the opportunity and project phasing avoids risk to capital spending as full capital funding is not required up-front. Cost estimation and budgeting will be more robust, keeping costs known and delivering the best value to citizens.



Strategy: Both internal and external stakeholders were involved in exploring needs, analyzing social, economic and environmental influences, visioning and developing a conceptual design. Early collaboration and collective understanding ensures operational efficiency and ongoing integration of services well after construction is complete. Detailed operational requirements will be discussed during the planning phase as they will be critical to design.

Strategic Actions Used:

- ✓ Plan facilities collaboratively across all service lines
- ✓ Develop facilities with flexibility to respond to evolving City services
- ✓ Plan projects in advance of capital budget requests to capitalize on grant and funding opportunities
- ✓ Partner with other levels of government and community groups to enhance the usability of facilities for citizens
- ✓ Locate and co-locate City services with other services to diversify the amenities available in communities



Fire Station No. 35

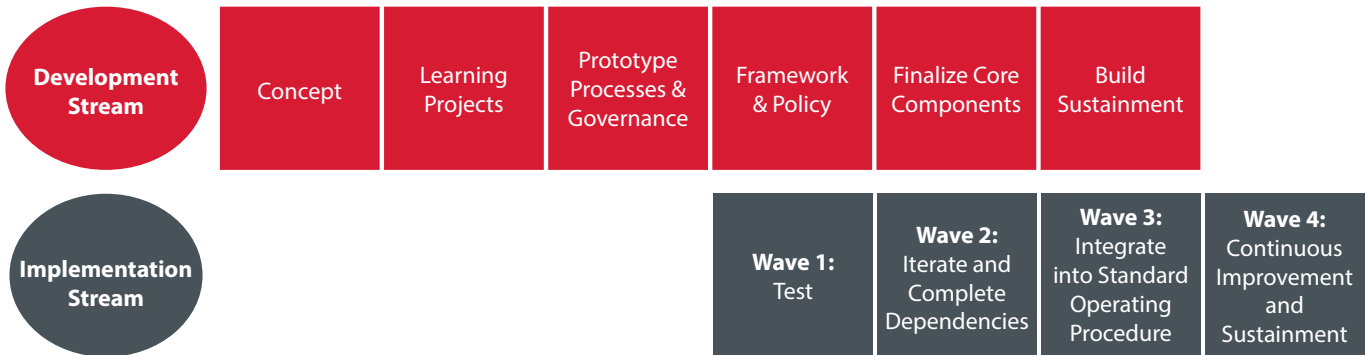


The Framework in Action: Development and Evaluation

Development of the Framework

The Corporate Facility Planning & Delivery Framework is based on industry practices adapted to work with The City’s policies, structure and business planning, and capital budgeting process. The Framework was developed through a collaborative cross-corporate approach that embedded learning and continuous improvement into the process.

The following diagram outlines the development and implementation streams of the Framework.



The use of Learning Projects to understand the nuances of complex projects that involve multiple stakeholders, both internal and external, has been critical to developing this Framework. Below is a selection of the Learning Projects undertaken during the development of the Framework.

- Corporate Lessons Learned** A review of past projects’ successes and areas for improvement including New Recreation Facilities program, Louise Station, Genesis Centre, Country Hills Multi-service Centre, and Operations Workplace Centre program.
- Varsity Multi-service Centre** The redevelopment of an existing City site to enhance Fire operations and include other internal and external partners to support a complete community. This project also looks to optimize the land for future uses.
- Public Access at Royal Vista Fire Station** A review of the public use of spaces in facilities not traditionally open for community use to assess operational impacts.
- Revitalize Established Community Facilities Study** An assessment of existing facilities in established Calgary communities to understand their potential for redevelopment into multi-service sites.
- Symons Valley Centre** The development of a multi-service greenfield site in conjunction with multiple internal and external stakeholders. A phased program that responds to service needs while maintaining the larger vision for the site.
- Thornhill Civic Centre** A large scale, multi-stakeholder redevelopment project on a major future Green Line TOD.
- Portfolio Planning for One Calgary** Portfolio planning to demonstrate the collaboration necessary to coordinate capital budget requests on multi-service projects.

Evaluation

The Corporate Facility Planning & Delivery Framework lays the groundwork not only for what The City will do but the evaluation of the system and the facilities delivered.

Evaluation will be in alignment with Results Based Accountability and focus on the broader impact of the investment made by The City in facilities, enabling greater alignment among the many services provided by The City. Having a focused and manageable set of measures and indicators establishes a common language that supports the Framework goals, promotes collaboration, and allows the measurement of progress.

Impacts from facility programs and projects will be projected before and measured after implementation to demonstrate the benefits of investment. Critical to the evaluation model is acknowledging that, because of the complexity of service requirements and the diversity of the facility portfolio, not every facility will achieve every goal. Progress towards the goals should be a cumulative effort, demonstrated across The City's facility portfolio as a whole. In addition, lessons learned throughout facility planning and delivery will be incorporated to support the long term continuous improvement of the Framework and the processes and governance within it.

To complete the evaluation model, the following actions will take place:

1. Develop a method for reporting on performance to different governing bodies
2. Establish indicators and measures based on the Framework goals and actions and the RBA methodology
3. Establish baseline data as a benchmark for progress
4. Commence measurement
5. Report progress towards goals

There are a number of dependencies that need to be addressed before a comprehensive evaluation program can be implemented. These dependencies are closely tied with the operations and asset management functions for the facility portfolio. They include complete, consistent, and reliable data for all City facilities, processes and stewards to manage the ongoing maintenance and collection of data, performance measures for services, and the implementation of the strategies.

Accountability

Facility Management (FM) has the corporate mandate to plan, build and operate The City of Calgary's facility portfolio. As the representative service owner, Facility Management is accountable for managing the collaborative, integrated processes as outlined in the Framework, and ensuring the right representation is involved in decision making. Governance has been structured to hold the Facility Management Service Sponsor responsible and the Deputy City Manager accountable for the execution of the Framework.

**Manchester Building A
Logistics Centre**



Appendix

Appendix A: Glossary of Terms

Accountable: The party that owns the ultimate result. Accountability can not be delegated.

Administrative functions: A set of tasks or activities that support the management of the business or organization.

Asset: Machinery, property, buildings, information technology hardware and software code, and other items and related systems that have a distinct and quantifiable business function or service, and a financial value and economic life greater than one year.¹⁹

Building systems: The network of mechanical structures that contribute to the operation of a facility, such as HVAC, plumbing, electrical, etc.

Business continuity: An ongoing process supported by senior management and adequately funded to ensure that the necessary steps are taken to identify the impact of potential losses and maintain viable recovery strategies and recovery plans for the continuity of services and operations, or continuity of government, following a disruptive event.²⁰

Collaboration: A process that involves a mutually beneficial relationship between parties that builds on shared outcomes.

Co-locate: The placement of two or more items, services or buildings in a singular or adjacent area to compliment or benefit all.

Complete Communities: Complete communities are vibrant, green and safe places, where people of varying ages, incomes, interests and lifestyles feel comfortable and can choose between a variety of building types and locations in which to live and where daily needs can be met. Complete communities include a range of housing and community services, schools and recreation facilities. The diversity within complete communities provides more choices, so that residents have the opportunity to live and remain in their own neighbourhood as their housing needs change over their lifetime.¹⁶

Corporate facility portfolio plan: A long-range (one to 30 years) facility plan encompassing the entire City portfolio of owned and/or leased space and outlines

what facilities The City will build, renovate, demolish, sell, and/or lease over the long-term. It aligns to the goals outlined in the Corporate Facility Planning and Delivery Framework and responds to Council's priorities and the organization's service requirements. The portfolio plan informs short-term (four year) tactical plans including the prioritization of, and funding for, facility related programs and projects.

Developers: Private sector, real estate developers and real estate builders who purchase raw land or existing buildings, provide vision, and bring capital to delivering residential, retail, office, industrial, etc. projects for sale or lease to the market.

Economies of scale: The advantages of implementing a plan with a wider scope versus a narrow scope. For example, co-locating several services in one facility will lower the operational costs each service is required to pay because it is split among more partners.

End of life: The optimal point in a facility's lifespan where the operational systems and physical structure are expected to fail and are no longer providing value or function for the cost to maintain it.

Evaluation model: A focused and manageable set of measures and indicators that establish a common language to support goals, promote collaboration and allow the measurement of progress.

Evidence-based decision making: Decisions are made based upon clear and concrete evidence developed through sound research and information gathering practices.

Facility or Facility infrastructure: Permanent, temporary or portable building structures, such as offices, garages, parkades, warehouses and recreational facilities intended to shelter persons and/or goods, machinery, equipment and working space. Includes heritage buildings that are used for administrative or operational purposes and leasehold improvement. Also referred to as a building.²¹

Facility Disposition: The strategic disposal of facility assets to avoid increasing maintenance costs, manage

investment or to relocate services to a preferred location.

Facility investment: The strategic allocation of funding for the planning, build, design and/or maintenance of City facilities in key areas that optimize service delivery to citizens.

Facility portfolio: The total facility holdings of The City of Calgary.

Facility program: A site-specific plan that outlines The City's long-term vision for a site, how and when it will be built, what and when services will be provided, and how the site will be operated.

Flexible: A quality of an entity/idea/process that allows it to change and adapt to meet both anticipated and unanticipated needs. Flexibility and adaptability aid in resiliency.

Framework: Basic structure and system for the planning and delivery of facilities made up of vision, goals, governance, processes, and strategies.

Governance: Authority levels and accountability to enable the achievement of stated goals in alignment with corporate objectives.

Guiding principles: The norms or ethics that guide the way The City plans and delivers facilities.

Integrate: The act of coordinating resources, services and programs to address common goals, to reduce duplication of efforts and improve efficiency and effectiveness.

Multi-service facility: A facility with two or more different uses or services provided within, such as a recreation facility with a library, Alberta Health clinic and a coffee shop.

Optimization: Making the best or most effective use of a resource. In context of this Framework, it refers to delivering the appropriate facility assets at the right time according to service needs, maximizing the utilization of asset holdings, and disposing surplus assets in a timely manner to reduce operational and maintenance costs.

Resiliency: The capacity of individuals, communities, institutions, businesses, and systems within a city to survive, adapt, and grow no matter what kind of chronic stresses and acute shocks they experience.

Responsible: The party that delivers the result. Responsibilities can be delegated for execution.

Service owners: The individual responsible for planning and monitoring a service, and for collaborating across organizational lines to represent and continually improve the service.

Single-use facility: A facility with only one use or service provided. In some instances, single-use facilities are the most appropriate option for certain services in a given location.

Stage gate: A process to manage risk and add value through structured decision-making, allowing the review of a project or initiative by the right people, asking the right questions at the right time.

Strategies: A defined approach, plan of action or policy designed to achieve overall aims or objectives. It includes a clearly defined objective, principles by which decisions are made, and the governance required to support decision making.

Transit-Oriented Development (TOD): A compact, mixed-use community within walking distance of a transit stop, that mixes residential, retail, office, open space and public uses in a way that makes it convenient to travel on foot or by public transportation instead of by car.¹⁶

* Some terms in this glossary were adapted from The City of Calgary's *Recreation Master Plan 2010-2020* and the *Glossary of Project Management Terms* from The City of Calgary's Project Management Hub.

Appendix B: Endnotes

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- Names of all facilities referenced throughout document are from the Corporate Structures List

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