

# Planning, Development & Assessment



# Planning, Development & Assessment

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### Planning, Development & Assessment

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## LINES OF SERVICE

|                                 |
|---------------------------------|
| Applications & Policy           |
| Assessment Development Services |
| Building Regulations            |
| Business Operations             |
| Business Services               |
| Business Strategy               |
| Centre City                     |
| City Wide Strategy              |
| Customer & Governance Services  |
| Customer Advisory Services      |
| Growth Management               |
| Valuation                       |

# Planning, Development & Assessment - Overview

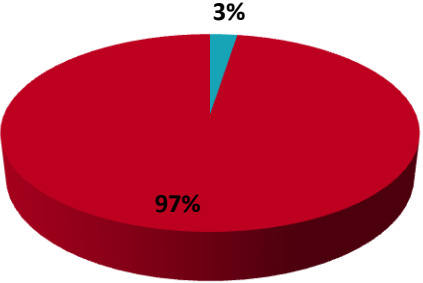
The Planning, Development & Assessment (PDA) department fulfills Calgary's vision for a great city by stewarding the creation, redevelopment and valuation of vibrant, sustainable communities. PDA does this by working collaboratively with citizens and stakeholders to develop land use policies and services that support land use and development, manage population growth, and regional planning. PDA also reviews development and building applications and ensures building safety by performing building inspections, in addition to, assessing all city properties and business to support The City's financial sustainability.

Calgary is a city of tremendous opportunity that finds itself at a critical juncture in its progress. How PDA plans now and the decisions that are made will shape the future of Calgary. This future-focussed work is

branded as nextCITY. With nextCITY, PDA is 'Aiming High' through an expanded and elevated public dialogue and growing smart through the delivery of tangible and valuable processes, products and services. PDA is aligning tactics with values to achieve positive change. NextCITY, including PDA's new planning system, ensures that work is future-focused and outcome-based, which is helping Calgary take the next step in its evolution in achieving the vision of Municipal Development Plan (MDP) and the Calgary Transportation Plan (CTP).

PDA is capitalizing on doing business differently and is in the early stages of implementing a departmental realignment, which will enhance process and improve how services are delivered to citizens and customers. This means delivering the best processes, products and services, while making the most of available resources.

**Planning, Development & Assessment  
Share of Tax Supported Net Operating Budget  
City Wide Total Tax Support: \$1,657 Million**



■ Planning, Development & Assessment ■ Other Tax Supported Operations

(City wide tax support amount is the average common revenues less corporate costs & debt servicing)

## Planning, Development & Assessment - Overview

### Trends

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Calgary's population is projected to increase significantly during this four year business cycle. PDA plans to accommodate this population by continuing to monitor and maintain land supply initiatives of planned and serviced land, developing plans and processing outline plans and applications.

The aging workforce and the competitive environment for talented qualified employees will impact PDA's ability to attract and maintain hard to fill positions. PDA will work with Human Resources (HR) to develop a strategic workforce plan to address this.

As the city evolves, there is more interest in walk-able, mixed use forms of higher density development that integrates the use of public and private spaces. PDA is committed to helping align decisions and effort to maximize investments in these spaces and to helping to influence and implement changes to regulations and policies that enable diverse, safe, and complete communities.

Business trends have been shifting towards more customer self-service options and improved access to information. Information should be available to the audience at the right time and in the manner that the customer expects to be able to receive it. PDA works towards achieving this need through an e-Services program of work and by dedicating significant effort to improving the transparency and consistency of its information and to make that information more available to the customers both on-line and in-person.

### Long-Term Plans

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The Municipal Development Plan (MDP) provides strategic direction that will help realize Council Priorities: A city of inspiring neighbourhoods; A prosperous city and A healthy and green city, by managing growth and

change, prioritizing corporate initiatives and public investment, and creating complete communities. PDA is putting this plan into action by ensuring co-ordination between departments and business units to align directions and work programs to achieve the objectives of the MDP. Other documents that play a significant role in PDA's actions include the Centre City Plan, the Calgary Heritage Strategy, the Growth Management Framework, and the Government of Alberta's South Saskatchewan Regional Plan. Each of these strategies, plans, and frameworks consist of multiple cross-business unit projects and initiatives that address the form, function, and alignment of development and redevelopment activities both now and into the future.

### Citizen Engagement

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During the Action Plan engagement process, several themes emerged that Planning, Development & Assessment have used to help customize and direct the work going forward: Affordable Housing; Community/Urban Planning; Effectiveness; and Service Levels. PDA is responding to the themes by including strategies and actions related to growth management, corridor planning, lobbying for legislative changes for affordable housing and identifying efficiencies in the services provided. PDA is committed to building relationships and more positive experiences for customers, citizens and stakeholders. Through the Customer Relations Management Program, PDA works to develop ongoing relationships, ensuring the department understands customers, citizens and stakeholders needs as they evolve and affirm that continuous improvement efforts are making a difference and meeting those needs.

PDA historically has been and continues to be a leader in citizen engagement holding over 30+ planning open houses each year alone. PDA is 'Aiming high' through an expanded and elevated public dialogue. This includes both discussions on specific planning matters in Calgary,

## Planning, Development & Assessment - Overview

but also on broad-based urban planning themes, which has demonstrated success with such initiatives as Baconfest, YYC neighbourhood, and 1000 Friends of YYC.

### Council Priorities

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Planning, Development & Assessment contribute to many of the Council Priorities in both a leading and supporting role.

#### A prosperous city:

PDA is committed to being an effective business partner, making it easier to do business with The City by facilitating understanding and predictability of planning and building processes and outcomes. This will be achieved by continuing to work with City departments to deliver the Municipal Development Plan objectives related to the goal, Prosperous economy (MDP 2.1). PDA will monitor its progress through a number of internal process measures and a biennial customer and stakeholder satisfaction survey.

#### A city of inspiring neighbourhoods:

PDA is committed to creating great places by encouraging complete and diverse communities. It will achieve this by promoting diversity in housing choice, amenities and services in alignment with the MDP goals Compact city (MDP 2.2), Great communities (MDP 2.3), Good urban design (MDP 2.4) and Managing growth (MDP 5.2). PDA will encourage the right efforts for the right outcomes and provide staff and customers with the tools and information to make effective decisions about growth and development.

#### A healthy green city:

PDA is committed to leveraging land use and building processes to support healthy, environmentally and fiscal sustainable places. This will be achieved by working with regional partners and the Government of

Alberta, while continuing to build public awareness and understanding. PDA will monitor this commitment through the South Saskatchewan Regional Plan and the Alberta Land Stewardship Act.

#### A city that moves:

PDA has not identified specific actions related to this Council priority, however, the ongoing work plan items related to the MDP goals, Connecting the city (MDP 2.5) and Compact city (MDP 2.2) will indirectly support this priority.

#### A well run city:

PDA is committed to achieving a well run city by continuing to build relationships with citizens, customers and stakeholders as well as providing proactive leadership and improving overall customer service. Focus will be put on expanding the network of partners and investing in access that allow for customers to experience a more positive interaction with the services provided by PDA. Progress will be monitored and measured by the performance metrics contained within the Customer Relations Management Program and other internal processes.

**Planning, Development & Assessment Commitment:**  
 PDA is committed to being an effective business partner to citizens, business, and partners. PDA will make it easier to do business with The City by facilitating understanding and predictability of planning and building processes and outcomes.

A prosperous city  
 Calgary continues to grow as a magnet for talent, a place where  
 there is opportunity for all, and the best place in Canada  
 to start and grow a business.

| Strategy Related to Council Outcome  | Accountable BU     |
|--|--------------------|
| P1 Strengthen Calgary’s position as a global energy centre and location of choice for international talent, investment and innovation through enhanced business development, marketing and place-making initiatives. | ASMT, CPI, IP, LPI |
| P2 Advance purposeful economic diversification and growth.   | CPI                |
| P3 Support civic, business and community partners, as well as business revitalization zones, to collaborate and attract local and global investment.   | ASMT, CPI, IP, LPI |
| P4 Cut red tape and continue to foster a competitive tax environment to help small business succeed.   | ASMT, CPI, IP, LPI |
| P6 Increase affordable and accessible housing options.   | CPI, LPI           |
| P8 Respond to the needs of an aging population.  | IP                 |
| P10 Expand our library system and enhance access to technology and information.  | ASMT, CPI, IP, LPI |

| Performance Measures Related to Council Outcome  | 2012 Actual | 2013 Actual | 2014 Estimated | 2015 Target | 2016 Target | 2017 Target | 2018 Target |
|--|-------------|-------------|----------------|-------------|-------------|-------------|-------------|
| P.PM1 Biennial customer satisfaction survey index score  | NA          | 102.7       | NA             | +2          | NA          | +2          | NA          |
| P.PM2 Per cent of Calgarians that agree Centre City is a desirable place to live                                 | 38% (2011)  | 49%         | NA             | 53%         | NA          | 53%         | NA          |
| P.PM3 Per cent of Calgarians who visit Centre City on a monthly or more basis to shop and/or eat lunch or dinner | NA          | 45%         | NA             | >50%        | NA          | >50%        | NA          |



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 there is opportunity for all, and the best place in Canada  
 to start and grow a business.

| Performance Measures Related to Council Outcome   | 2012 Actual | 2013 Actual | 2014 Estimated | 2015 Target | 2016 Target | 2017 Target | 2018 Target |
|---|-------------|-------------|----------------|-------------|-------------|-------------|-------------|
| P.PM4 Per cent of Single Construction Permits issued in less than 21 days   | 87%         | 90%         | 90%            | 80%         | 80%         | 80%         | 80%         |
| P.PM5 Per cent of Residential Improvement Projects Permits issued in less than 7 days   | 81%         | 77%         | 85%            | 80%         | 80%         | 80%         | 80%         |
| P.PM6 Per cent of Commercial /Multi Family Permits for projects under 1 million dollars issued in less than 21 days                     | 92%         | 93%         | 91%            | 80%         | 80%         | 80%         | 80%         |
| P.PM7 Per cent of Commercial /Multi Family Permits for projects over 1 million dollars issued in less than 56 days                      | 96%         | 100%        | 100%           | 80%         | 80%         | 80%         | 80%         |
| P.PM8 Per cent of customers served within 20 minutes of arrival at the permit /licensing counter  | 58.7%       | 50.9%       | 59.5%          | 80%         | 80%         | 80%         | 80%         |
| P.PM9 Per cent of business tax revenue transferred to non-residential property tax as part of the Business Tax Consolidation initiative | NA          | NA          | 10%            | 20%         | 40%         | 60%         | 80%         |

**Alignment of Strategies and Performance Measures to Long-Term Plans**

Many of the actions continue work from PDA's Customer Relationship Management Program and are aligned with work on The City's Digital Strategy and Information Governance Policy.



**Planning, Development & Assessment Commitment:**  
 PDA works with all stakeholders to create complete communities, encouraging diversity in amenities, housing types, activities and services to create places where all citizens can make choices about their quality of life.

A city of inspiring neighbourhoods  
 Every Calgarian lives in a safe, mixed and just neighbourhood,  
 and has the opportunity to participate in civic life.

| Strategy Related to Council Outcome   | Accountable BU     |
|---|--------------------|
| N3 Enhance The City's capacity and resiliency to prepare for and respond to pandemics, natural disasters and emergency situations.  | ASMT, CPI, IP, LPI |
| N5 Systematically invest in established neighbourhoods as they evolve to accommodate changing community needs.  | CPI, IP, LPI       |
| N6 Manage and promote growth to achieve the best possible social, environmental and economic outcomes within financial capacities.  | ASMT, CPI          |
| N7 Develop a new funding framework to provide for infrastructure in new and redeveloping neighbourhoods.  | ASMT, CPI, IP, LPI |
| N8 Make it easier to build developments that meet our Municipal Development Plan and Calgary Transportation Plan objectives.  | CPI, LPI           |
| N9 Provide great public spaces and public realm improvements across the city to foster opportunity for well used public spaces and places for citizen connections and urban vitality. | CPI, LPI           |
| N10 Review The City's heritage processes to improve the protection and enhancement of heritage assets.  | CPI                |

| Performance Measures Related to Council Outcome                                 | 2012 Actual | 2013 Actual | 2014 Estimated | 2015 Target | 2016 Target | 2017 Target | 2018 Target |
|---|-------------|-------------|----------------|-------------|-------------|-------------|-------------|
| N.PM1 Per cent of net new dwelling units within the 2005 built up area boundary | 25%         | 25%         | 26%            | 27%         | 27%         | 28%         | 29%         |
| N.PM2 Per cent population growth within the 2005 built up area boundary         | 9%          | 14%         | 10%            | 10%         | 10%         | 10%         | 10%         |
| N.PM3 Residential diversity index in communities                                | 0.20        | NA          | 0.19           | 0.20        | 0.20        | 0.21        | 0.22        |





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and has the opportunity to participate in civic life.

| Performance Measures Related to Council Outcome  | 2012 Actual | 2013 Actual | 2014 Estimated | 2015 Target | 2016 Target | 2017 Target | 2018 Target |
|--|-------------|-------------|----------------|-------------|-------------|-------------|-------------|
| N.PM4 Land use diversity index   | 0.53        | NA          | 0.54           | 0.54        | 0.55        | 0.55        | 0.55        |
| N.PM5 Number of years of planned land supply   | 12 to 14    | 13          | 12 to 13       | 15          | 15          | 15          | 15          |
| N.PM6 Number of years of fully serviced land   | 3 to 5      | 3 to 4      | 3 to 5         | 3 to 5      | 3 to 5      | 3 to 5      | 3 to 5      |
| N.PM7 Number of new Historic Sites protected through Municipal Designation Bylaws per year | NA          | 6           | 14             | 6           | 6           | 6           | 6           |
| N.PM8 Number of heritage incentives used per year  | NA          | NA          | NA             | 1           | 1           | 1           | 1           |

**Alignment of Strategies and Performance Measures to Long-Term Plans**

Documents that play a significant role in PDA's actions include the Centre City Plan Implementation Strategy, the Corridors Program, the Calgary Heritage Strategy, the Growth Management Framework, Calgary Transportation Plan, and the MDP Plan to Action. Each of these strategies, plans, and frameworks consist of multiple cross-business unit projects and initiatives that address the form, function, and alignment of development and redevelopment activities both now and into the future.



**Planning, Development & Assessment Commitment:**

PDA will leverage land use and building processes to support healthy, environmentally and fiscal sustainable places.

| Strategy Related to Council Outcome   | Accountable BU |
|---|----------------|
| H4 Work with our regional partners and the Government of Alberta on an integrated approach to the watershed.                  | CPI            |
| H6 Continue to build public awareness and understanding of our shared responsibility to conserve and protect the environment. | CPI, LPI       |

| Performance Measures Related to Council Outcome   | 2012 Actual | 2013 Actual | 2014 Estimated | 2015 Target | 2016 Target | 2017 Target | 2018 Target |
|---|-------------|-------------|----------------|-------------|-------------|-------------|-------------|
| H.PM1 Per cent voluntary participation rate in the sustainable development inventory survey   | NA          | NA          | NA             | 25%         | 50%         | 75%         | 95%         |
| H.PM2 Per cent of total population within Activity Centres and within 600 m of Corridors, as outlined in the Municipal Development Plan | 18.8%       | NA          | NA             | 19.25%      | 19.40%      | 19.55%      | 19.70%      |

**Alignment of Strategies and Performance Measures to Long-Term Plans**

The Greening the city goal in the Municipal Development Plan, the Government of Alberta's South Saskatchewan Regional Plan and the Alberta Land Stewardship act will guide these actions.

A healthy and green city  
 We steward our air, land, and water while encouraging healthy lifestyles for all Calgarians.



**Planning, Development & Assessment Commitment:**

PDA is pro-active and strategic in mitigating risks and finding opportunities for improvement. PDA will be involved in the community and build relationships with customers to provide services they have confidence in.

A well-run city  
Calgary's government is open, responsive, accountable and transparent, delivering excellent services at a fair price. We work with our government partners to ensure we have the tools we need.

| Strategy Related to Council Outcome  | Accountable BU     |
|--|--------------------|
| W1 Finalize a new City Charter with the province.  | ASMT, CPI, IP, LPI |
| W2 Be as efficient and effective as possible, reducing costs and focusing on value-for-money.  | ASMT, CPI, IP, LPI |
| W3 Examine opportunities for alternative service delivery for competitiveness.   | ASMT, IP, LPI      |
| W4 Balance demand for quality City services with affordable taxes.   | ASMT               |
| W5 Regularly collaborate and engage citizens to encourage participation in City decision-making, and better communicate the reasons for the decisions. | ASMT, CPI, IP, LPI |
| W6 Effectively manage The City's inventory of public assets, optimizing limited resources to balance growth and maintenance requirements.              | ASMT, CPI          |
| W7 Continue to transform the organization to be more citizen-focused in its approach and delivery of service.  | ASMT, CPI, IP, LPI |
| W9 Strive to be an employer of choice with a focus on addressing The City's aging workforce.   | ASMT, CPI, IP, LPI |
| W10 Support the Corporate Safety Strategy  | ASMT, CPI, IP, LPI |

| Performance Measures Related to Council Outcome   | 2012 Actual | 2013 Actual | 2014 Estimated | 2015 Target | 2016 Target | 2017 Target | 2018 Target |
|---|-------------|-------------|----------------|-------------|-------------|-------------|-------------|
| W.PM1 Per cent of customers who feel PDA offers service value for money                               | NA          | NA          | NA             | TBD         | NA          | +2%         | NA          |
| W.PM2 Per cent of stakeholders who feel PDA offer service value for money                             | NA          | NA          | TBD            | NA          | +2%         | NA          | +2%         |
| W.PM3 Per cent of employee that know what is expected of them in providing excellent customer service | 84%         | 80%         | NA             | 84%         | 86%         | 88%         | 90%         |



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| Performance Measures Related to Council Outcome   | 2012 Actual | 2013 Actual | 2014 Estimated | 2015 Target | 2016 Target | 2017 Target | 2018 Target |
|---|-------------|-------------|----------------|-------------|-------------|-------------|-------------|
| W.PM4 Direct inquiry/total account ratio during Assessment's Customer Review Period   | 1.8%        | 1.8%        | 1.2%           | <=3.0%      | <=3.0%      | <=2.5%      | <=2.5%      |
| W.PM5 Per cent of those surveyed who had contact with The City regarding their assessment and were satisfied with the customer service provided | 84%         | 88%         | 81%            | >=80%       | >=80%       | >=80%       | >=80%       |
| W.PM6 Number of assigned departmental workstations decreased  | NA          | NA          | NA             | 0           | 0           | 0           | 109         |
| W.PM7 PDA Employee Satisfaction Score   | NA          | 119         | NA             | 119         | 120         | 121         | 122         |
| W.PM8 Assessed value to Sales value Ratio (ASR) of annual roll, for residential single family dwellings   | 99.9%       | 99.8%       | 100%           | 95% to 105% | 95% to 105% | 96% to 104% | 97% to 103% |
| W.PM9 Coefficient Of Dispersion (COD) of annual roll, for residential single family dwellings   | 6.3%        | 6.2%        | 5.9%           | <=10%       | <=10%       | <=10%       | <=10%       |
| W.PM10 Per cent of the total annual assessment base under formal complaint  | 26.85%      | 27.50%      | 30.4%          | <=35%       | <=35%       | <=35%       | <=35%       |
| W.PM11 Per cent of the total annual assessment base sustained after tribunal  | 99.60%      | 99.54%      | 99.47%         | >=97%       | >=97%       | >=97.5%     | >=97.5%     |
| W.PM12 Operating cost of providing assessment services per 100 total property and business tax dollars  | \$0.98      | \$0.90      | \$0.93         | <=\$1.00    | <=\$1.00    | <=\$0.95    | <=\$0.95    |
| W.PM13 Total Department-wide recordable Injury Frequency  | NA          | 1.3         | NA             | 1.2         | 1.1         | 1.0         | 0.9         |
| W.PM14 Average Department-wide number of days lost per accepted WCB claims  | NA          | 24          | NA             | 21          | 19          | 17          | 16          |



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PDA is pro-active and strategic in mitigating risks and finding opportunities for improvement. PDA will be involved in the community and build relationships with customers to provide services they have confidence in.

A well-run city  
 Calgary's government is open, responsive, accountable and transparent, delivering excellent services at a fair price. We work with our government partners to ensure we have the tools we need.

| Performance Measures Related to Council Outcome   | 2012 Actual | 2013 Actual | 2014 Estimated | 2015 Target | 2016 Target | 2017 Target | 2018 Target |
|---|-------------|-------------|----------------|-------------|-------------|-------------|-------------|
| W.PM15 Department-wide Lost Time Claims Frequency | NA          | NA          | NA             | 0.9         | 0.8         | 0.5         | 0.3         |

**Alignment of Strategies and Performance Measures to Long-Term Plans**

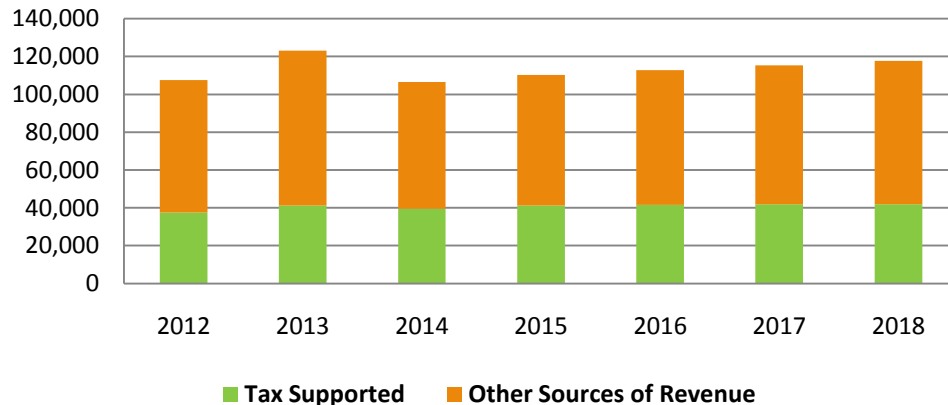
PDA's actions are consistent with Tomorrow's Workplace, corporate customer service framework, corporate safety and corporate workforce direction.



## Planning, Development & Assessment - Operating Budget Overview

| Planning, Development & Assessment                                   |                |                |   |                         |                         |                         |                         |
|--|----------------|----------------|---|-------------------------|-------------------------|-------------------------|-------------------------|
| Total Operating Budget (\$000s) (Totals may not add due to rounding) |                |                |   |                         |                         |                         |                         |
|  | 2012<br>Actual | 2013<br>Actual | 2014<br>Total<br>Budget<br>(as of<br>June 30) | 2015<br>Budget<br>Total | 2016<br>Budget<br>Total | 2017<br>Budget<br>Total | 2018<br>Budget<br>Total |
| Expenditures   | 115,344        | 131,402        | 110,906                                       | 146,135                 | 149,510                 | 153,194                 | 156,604                 |
| Recoveries   | (7,747)        | (8,371)        | (4,336)                                       | (35,837)                | (36,780)                | (37,893)                | (38,832)                |
| Revenue  | (70,129)       | (81,735)       | (67,024)                                      | (69,038)                | (71,221)                | (73,476)                | (75,805)                |
| Net  | 37,468         | 41,295         | 39,546  | 41,259                  | 41,509                  | 41,824                  | 41,966                  |
| FTEs   | 754.2          | 764.2          | 719.2   | 721.2                   | 722.2                   | 723.2                   | 724.2                   |

**Planning, Development & Assessment  
Funding of Operating Expenditures (Net of Recoveries)  
(\$000s)**



### Operating Budget Highlights

In the 2012-2014 Business Plan, Council directed PDA to re-engineer and simplify the planning process. PDA responded with a departmental realignment approved by the Priorities and Finance Committee in January 2014. One of the key features of this new structure is the amalgamation of like-functions to support integrated decision making, create a workplace for personal and professional success and, to ensure a consistent approach to customer-focused service. Land Use Policy & Planning (LUPP) and Development & Building Approvals (DBA) were officially disbanded as of May 1, 2014, and are now represented by three new business units.

PDA is a mix of tax supported and self-supported functions: with tax supported funding being the smaller portion of PDA's total funding. As a result of the reorganization, operational funding has been re-aligned to reflect the new structure. However, as this structure and supporting process stabilizes, further analysis will be required to ensure the accuracy and efficiency of these allocations going forward.

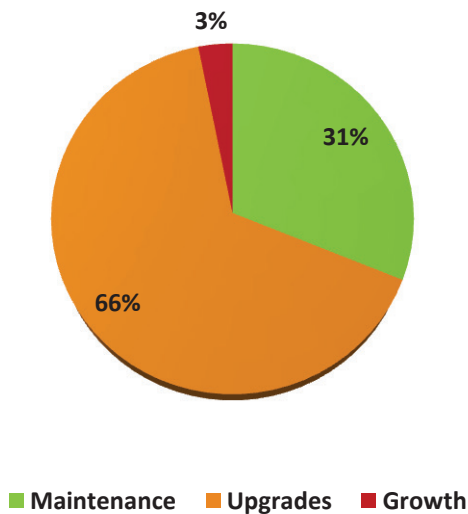
PDA has been allocated limited increases to its operating budget, even though Calgary's growing and changing population directly correlates to an increasing and more complex workload. Efficiency gains for services will be pursued through the continued execution of the departmental realignment, on-going process improvements and IT system enhancements. Progress will be reported in future budget revisions and adjustments.

## Planning, Development & Assessment - Capital Budget Overview

| Planning, Development & Assessment                                 |               |               |               |               |               |          |                     |
|--|---------------|---------------|---------------|---------------|---------------|----------|---------------------|
| Total Capital Budget (\$000s) (Totals may not add due to rounding) |               |               |               |               |               |          |                     |
|  | 2014          | 2015          | 2016          | 2017          | 2018          | *2019+   | Total (2015-*2019+) |
| Previously-Approved Budget<br>(as at 2014 June 30)                 | 15,732        | 1,000         | 0             | 0             | 0             |          | 1,000               |
| <b>Breakdown of New Budget Requests</b>                            |               |               |               |               |               |          |                     |
| Maintenance/Replacement  |               | 3,050         | 4,150         | 5,050         | 3,200         | 0        | 15,450              |
| Upgrades   |               | 8,300         | 7,700         | 8,400         | 8,200         | 0        | 32,600              |
| Growth   |               | 700           | 500           | 200           | 150           | 0        | 1,550               |
| Service Change   |               | 0             | 0             | 0             | 0             | 0        | 0                   |
| Total New Budget Requests  |               | 12,050        | 12,350        | 13,650        | 11,550        | 0        | 49,600              |
| <b>Total Capital Budget</b>  | <b>15,732</b> | <b>13,050</b> | <b>12,350</b> | <b>13,650</b> | <b>11,550</b> | <b>0</b> | <b>50,600</b>       |

\*2019+ represents projects which start within the 2015 - 2018 cycle and which are completed in years beyond 2018.

**Planning, Development & Assessment**  
**New Capital Budget Requests by Project Type**  
**(2015-\*2019+)**  
**Total \$50 Million**



**Maintenance/Replacement** - This capital supports permit and development processes. Most of the investment is directed to the internal supporting systems such as work management and payment processing software. Replacement of logistical assets such as vehicles and equipment used by inspections and permitting staff are also reflected in PDA's maintenance budget.

**Upgrades** - Capital investments are being made into replacing critical supporting technology infrastructure. The largest capital project is replacement of Assessment's Calgary Integrated Assessment Office (CIAO) system. This system enables Assessment to prepare, communicate, and defend over 500,000 annual property and business assessments. The current system will not be supported by the vendor by 2019 and must be upgraded or replaced. This program also supports development and conversion of systems that support external customer-facing services. This work enables transition of planning and building products on-line.

**Growth** - Budget investment in this category supports investment in infrastructure that leverages growth and place making activities and looks at entirely new technologies such as 3D visualization tools.

# Assessment

Tab8

**Assessment**  
Tab7

Tab6

Tab5

Tab4

Tab3

Tab2

Tab1



## PDA: Assessment - Overview

Assessment's role is to annually prepare, communicate and defend property and business assessments for The City of Calgary. Over 500,000 of these assessments were produced in 2014 which provided the basis for over \$2.23 billion of property and business taxes. This represented approximately 50 per cent of The City's total municipally generated revenues. The City uses this stable revenue base to provide important services demanded by customers.

### Assessment Development Services (ADS)

This service provides co-ordination, oversight and functional expertise on a range of Assessment's core operations.

### Business Services (BUS)

This service supports Assessment in the business functions that an organization needs to be successful and in order to continuously improve.

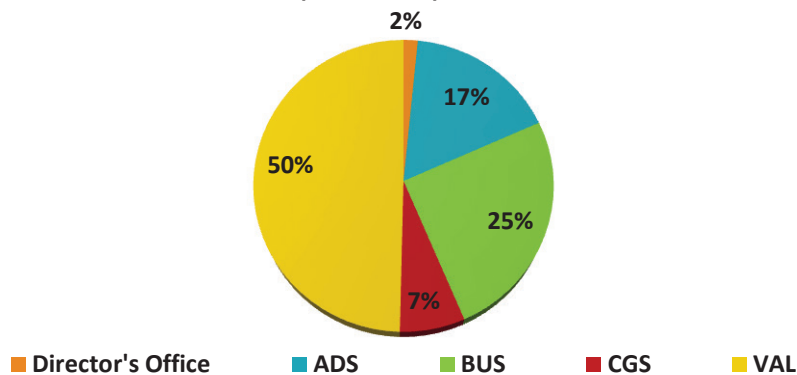
### Customer & Governance Services (CGS)

This service supports Assessment through the co-ordination of internal and external communications and governance. These efforts include, but are not limited to, exemptions, policy and advocacy work. This work targets Council, citizens, internal staff, other municipalities, the Province and other business units within The City.

### Valuation (VAL)

This service is the largest provided by the business unit and it focuses on Assessment's core operations: the preparation, communication and defence of assessments.

**Assessment**  
**Gross Operating Expenditure by Line of Service**  
**(2015-2018)**



Values may not sum to 100%, due to rounding.

## PDA: Assessment - Overview

### Trends

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Assessment identified the following as the main trends that will affect service needs and priorities for the business unit over the long-term:

- Attraction and retention of qualified staff with the necessary skill set is becoming more difficult, due to changes in the labour market. Efforts will be made to expand the hiring pool, develop talent from within and increase staff engagement.
- IT systems are being increasingly relied upon to provide services in an efficient and effective manner. Assessment's core IT system is coming to the end of its lifecycle. This system is vital to Assessment operations and work to replace this system will be a central focus of the next four years.
- A growing population and the corresponding growth rate in property and business accounts is proportionally larger than growth rate in staffing levels. Efficiency gains to meet this increasing demand for services will be pursued through process improvement and IT system enhancements.
- Increased scrutiny by tax payers and their agents requires complete/accurate data and constantly improving valuation methodologies so that tribunal risk is effectively managed. Data reviews and process improvement initiatives will be implemented to address this trend.
- Expected changes to the Municipal Government Act within the 2015-2018 timeframe may require Assessment to adapt to a new or changed legislative environment. Continued engagement as a major stakeholder in this process should provide the advance notice required to effectively react to any of these changes.
- In response to the 2013 flood, there will be continued efforts to ensure affected properties are assessed fairly and equitably. There will also be a renewed focus on business continuity planning to ensure the appropriate response to any future service disruptions.

### Long-Term Plans

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Assessment's contribution to long-term plans is primarily through supporting the business units who are leading these plans. For example, Assessment supports the Municipal Development Plan (MDP) and Sustainability Direction (2020 SD) through the provision of property and business related data. It is expected that these contributions will remain consistent through the course of 2015-2018.

### Citizen Engagement

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The one theme that was particularly applicable to Assessment from the Action Plan 2015-2018 engagement results was "Efficiency / Effectiveness". Citizens were looking for an improved demonstration of spending efficiencies in municipal service delivery. This requirement will help guide the direction of the Assessment business unit throughout 2015-2018. Assessment annually engages with property and business owners through the Advance Consultation Period (ACP) and the Customer Review Period (CRP). This allows Assessment to develop a dialogue with customers and establish strong customer relationships.

### Council Priorities

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The Assessment business unit doesn't lead any of Council's strategic actions but contributes to the Council Priorities through supporting the business units that do. Assessment operates under the rules established under Part 9 of the Municipal Government Act. This legislation is quite prescriptive which means that some of Council's strategic actions are more applicable to Assessment than others.

The highest priority of Council's strategic actions for Assessment, is to balance demand for quality City services with affordable taxes. This speaks directly to Assessment's core business particularly, the preparation and defence of property and business assessments. These assessments provide the basis for approximately 50 per cent of The

## **PDA: Assessment - Overview**

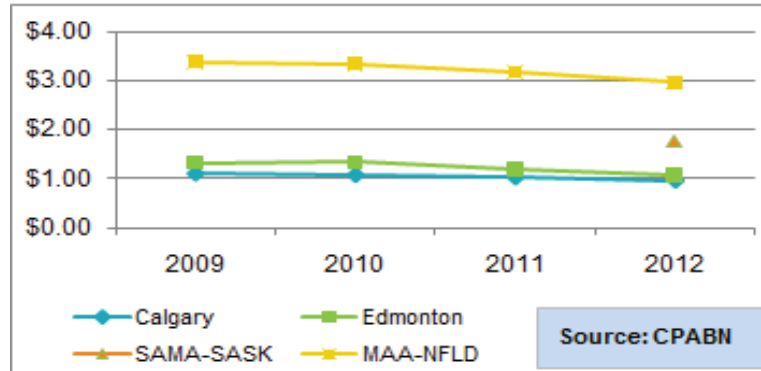
City's total municipally generated revenues.

Another important Council strategic action for Assessment, is to continue to transform the organization to be more citizen-focused in its approach and delivery of service. Here, Assessment will concentrate on improving the customer experience through clear communication, staff training and increased accountability.

The last Council strategic action that Assessment contributes to is to strive to be an employer of choice with a focus on addressing The City's aging workforce. While previously identified as an emerging issue, there will be renewed efforts throughout 2015-2018 to manage this area of concern. Specific business unit actions will involve efforts to improve attraction/retention of qualified staff, workload management, learning/development and staff engagement.

## PDA: Assessment - Benchmarking

### Operating cost of providing assessment services per 100 total property and business tax dollars



Benchmarking across Canadian assessment jurisdictions is difficult as each can differ significantly in their size, length of the assessment cycle, level of regulation and whether assessment services are supplied municipally or regionally. Despite this, benchmarking still occurs through the Canadian Property Assessment Benchmarking Network (CPABN). Edmonton, SAMA and MAA were the only participants in this network that provided data for use in this document. SAMA is the assessment jurisdiction for all of Saskatchewan except Regina and Saskatoon. MAA is the assessment jurisdiction for all of Newfoundland.

### Learning and Best Practices

A review of the above graph shows that Calgary provides the most cost-effective assessment services per 100 total property and business tax dollars of these comparables.

### Improvement Initiatives & Action Plan 2015-2018

Comparables seem to be trending downward so the efficiency improvements The City of Calgary Assessment business unit is undertaking within Action Plan 2015-2018 will be needed just to maintain this position.

**PDA: Assessment - Actions for Council Approval**

For Council Approval

**Planning, Development & Assessment Commitment:**

PDA is committed to being an effective business partner to citizens, business, and partners. PDA will make it easier to do business with The City by facilitating understanding and predictability of planning and building processes and outcomes.

A prosperous city  
Calgary continues to grow as a magnet for talent, a place where  
there is opportunity for all, and the best place in Canada  
to start and grow a business.

| Strategy Related to Council Outcome  | Business Unit Action Related to Strategy  | Accountable Service |
|--|---|---------------------|
| P1 Strengthen Calgary’s position as a global energy centre and location of choice for international talent, investment and innovation through enhanced business development, marketing and place-making initiatives. | P1.1 Increase PDA participation in industry groups.   | ADS, VAL            |
| P3 Support civic, business and community partners, as well as business revitalization zones, to collaborate and attract local and global investment.   | P3.1 Build a reputation for being knowledgeable in our field of expertise and helpful in achieving deadlines.     | ADS, CGS, VAL       |
| P4 Cut red tape and continue to foster a competitive tax environment to help small business succeed.   | P4.1 Implement the business tax consolidation initiative.   | CGS, VAL            |
|  | P4.2 Improve citizen/business outreach by making information more useful/useable and available in more languages. | CGS                 |



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P4 Cut red tape and continue to foster a competitive tax environment to help small business succeed.

P4.3 Facilitate self-service by increasing the availability of on-line tools.

BUS, CGS

P10 Expand our library system and enhance access to technology and information.

P10.1 Improve public access to PDA stewarded information.

ADS, CGS

P10.2 Improve PDA information management practices.

ADS, BUS



For Council Approval

**Planning, Development & Assessment Commitment:**  
 PDA works with all stakeholders to create complete communities, encouraging diversity in amenities, housing types, activities and services to create places where all citizens can make choices about their quality of life.

A city of inspiring neighbourhoods  
 Every Calgarian lives in a safe, mixed and just neighbourhood,  
 and has the opportunity to participate in civic life.

| Strategy Related to Council Outcome  | Business Unit Action Related to Strategy   | Accountable Service |
|--|--|---------------------|
| N3 Enhance The City's capacity and resiliency to prepare for and respond to pandemics, natural disasters and emergency situations. | N3.1 Further develop and implement a business continuity plan and risk management strategy.                | ADS                 |
| N6 Manage and promote growth to achieve the best possible social, environmental and economic outcomes within financial capacities. | N6.1 Utilize property assessment information to assist in growth planning that is financially sustainable. | ADS                 |
| N7 Develop a new funding framework to provide for infrastructure in new and redeveloping neighbourhoods.                           | N7.1 Optimize and leverage existing funding resources to support City development objectives.              | ADS, CGS            |



**PDA: Assessment - Actions for Council Approval**

For Council Approval

**Planning, Development & Assessment Commitment:**  
 PDA is pro-active and strategic in mitigating risks and finding opportunities for improvement. PDA will be involved in the community and build relationships with customers to provide services they have confidence in.

A well-run city  
 Calgary's government is open, responsive, accountable and transparent, delivering excellent services at a fair price. We work with our government partners to ensure we have the tools we need.

| Strategy Related to Council Outcome   | Business Unit Action Related to Strategy  | Accountable Service |
|---|---|---------------------|
| W1 Finalize a new City Charter with the province.   | W1.1 Lobby for governing legislation changes that allow services to be provided as efficiently and effectively as possible. | CGS                 |
| W2 Be as efficient and effective as possible, reducing costs and focusing on value-for-money. | W2.1 Employ business intelligence tools and data analytics to monitor business risks and business performance.              | ADS                 |
|   | W2.2 Improve performance standards and targets and establish benchmarks that justify funding requirements and processes.    | ADS                 |
|   | W2.3 Complete and implement a long term workspace strategy.   | BUS                 |
|   | W2.4 Continue to improve and implement business process management practices.   | BUS                 |
| W3 Examine opportunities for alternative service delivery for competitiveness.                | W3.1 Investigate alternative revenue sources to support service delivery.   | CGS                 |





For Council Approval

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 PDA is pro-active and strategic in mitigating risks and finding opportunities for improvement. PDA will be involved in the community and build relationships with customers to provide services they have confidence in.

|  |  |               |
|--|--|---------------|
| W4 Balance demand for quality City services with affordable taxes.   | W4.1 Protect the City of Calgary through application of risk management practices to the assessment process.                     | ADS           |
|  | W4.2 Produce property and business assessments to provide The City of Calgary and Provincial government with stable tax revenue. | VAL           |
| W5 Regularly collaborate and engage citizens to encourage participation in City decision-making, and better communicate the reasons for the decisions. | W5.1 Continue to develop stakeholder relationships to achieve positive outcomes.   | ADS, CGS, VAL |
| W6 Effectively manage The City's inventory of public assets, optimizing limited resources to balance growth and maintenance requirements.              | W6.1 Enhance long term planning for PDA technologies and assets.   | BUS           |
|  | W6.2 Explore opportunities to use new technologies.  | BUS           |
|  | W6.3 Keep up with new versions of critical supporting technology and optimize use of existing technologies to increase capacity. | BUS           |



For Council Approval

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**Planning, Development & Assessment Commitment:**  
 PDA is pro-active and strategic in mitigating risks and finding opportunities for improvement. PDA will be involved in the community and build relationships with customers to provide services they have confidence in.

W7 Continue to transform the organization to be more citizen-focused in its approach and delivery of service.

W7.1 Integrate customer service commitments and standards into Department and Business Unit programs and services by 2018 to drive program and service improvements.

CGS

W7.2 Set clear expectations for staff and reinforce those through learning and development and recognition programs to empower staff to deliver excellent customer service.

BUS, CGS

W7.3 Establish service standards, metrics and targets incorporating customer feedback to provide responsive and quality service.

CGS

W7.4 Use customer metrics to drive service improvements, process efficiencies and value for money.

CGS

W9 Strive to be an employer of choice with a focus on addressing The City's aging workforce.

W9.1 Build an inclusive workplace that is reflective of the greater community.

ADS, BUS, CGS, VAL

W9.2 Develop a PDA strategic workforce plan that responds to and forecasts workforce trends.

ADS, BUS, CGS, VAL



For Council Approval

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 Calgary's government is open, responsive, accountable and transparent, delivering excellent services at a fair price. We work with our government partners to ensure we have the tools we need.

**Planning, Development & Assessment Commitment:**  
 PDA is pro-active and strategic in mitigating risks and finding opportunities for improvement. PDA will be involved in the community and build relationships with customers to provide services they have confidence in.

W9 Strive to be an employer of choice with a focus on addressing The City's aging workforce.

W9.3 Develop and implement strategic workforce learning and development plans that foster a high performing culture.

ADS, BUS, CGS, VAL

W10 Support the Corporate Safety Strategy

W10.1 Foster a risk-based health and safety focused culture.

BUS

W10.2 Improve reporting and follow-up procedures for specific leading safety indicators, near misses and hazardous conditions.

BUS



## PDA: Assessment - Lines of Service

| Breakdown of Operating Budget by Service (\$000) (Totals may not add due to rounding) |        |        |       |        |        |       |        |        |       |        |        |       |        |        |       |
|---|--------|--------|-------|--------|--------|-------|--------|--------|-------|--------|--------|-------|--------|--------|-------|
|   | 2014   |        |       | 2015   |        |       | 2016   |        |       | 2017   |        |       | 2018   |        |       |
|   | \$ Exp | \$ Net | FTEs  | \$ Exp | \$ Net | FTEs  | \$ Exp | \$ Net | FTEs  | \$ Exp | \$ Net | FTEs  | \$ Exp | \$ Net | FTEs  |
| Director's Office   | 341    | 341    | 2.0   | 343    | 343    | 2.0   | 347    | 347    | 2.0   | 351    | 351    | 2.0   | 351    | 351    | 2.0   |
| Assessment Development Services   | 3,462  | 3,460  | 35.2  | 3,547  | 3,545  | 35.2  | 3,644  | 3,642  | 35.2  | 3,753  | 3,751  | 35.2  | 3,895  | 3,893  | 36.2  |
| Business Services   | 5,397  | 5,397  | 29.0  | 5,475  | 5,475  | 29.0  | 5,548  | 5,548  | 29.0  | 5,632  | 5,632  | 29.0  | 5,632  | 5,632  | 29.0  |
| Customer & Governance Services  | 1,439  | 1,439  | 7.0   | 1,463  | 1,463  | 7.0   | 1,491  | 1,491  | 7.0   | 1,522  | 1,522  | 7.0   | 1,522  | 1,522  | 7.0   |
| Valuation   | 10,027 | 10,027 | 91.0  | 10,541 | 10,415 | 93.0  | 10,863 | 10,737 | 93.0  | 11,229 | 11,103 | 93.0  | 11,229 | 11,103 | 93.0  |
| Total Business Unit   | 20,665 | 20,663 | 164.2 | 21,369 | 21,241 | 166.2 | 21,894 | 21,766 | 166.2 | 22,486 | 22,358 | 166.2 | 22,628 | 22,500 | 167.2 |

Over the 2015-2018 timeframe, the operating budget for the Assessment business unit is almost 100 per cent tax-supported with approximately 90 per cent of that budget being used for salaries, wages and benefits. This means that tax dollars provided to Assessment go principally to employing staff members who provide services to customers. At a high level these services can be summarized as the preparation, communication and defence of property and business assessments.

In 2014, property and business assessments provided the basis for \$2.23 billion in tax revenues. Of that revenue, \$667 million was paid to the Province of Alberta through the Alberta School Foundation Fund requisition. The remainder represented approximately 50 per cent of the total municipally generated revenues for The City of Calgary and was used to pay for many of the services provided to City of Calgary customers.

Assessment has forecasted a 2.0-2.7 per cent increase in property and business assessment accounts annually in Calgary throughout 2015-2018. While Assessment's operating budget accommodates some of this growth it is not enough to keep up with this increasing workload. Assessment will therefore be pursuing opportunities to become increasingly efficient with the resources available in order to manage that gap. At a high level, these efficiency related changes will be primarily tied to process improvements and IT systems enhancements. This aligns well with both long-term plans and citizen engagement results, which call for business units to employ a continual effort to become more efficient.

**PDA: Assessment - Lines of Service**

*All \$ values are in Thousands (\$000)*

| Assessment Development Services | 2014   |        |      | 2015   |        |      | 2016   |        |      | 2017   |        |      | 2018   |        |      |
|---------------------------------|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|
|                                 | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs |
|                                 | 3,462  | 3,460  | 35.2 | 3,547  | 3,545  | 35.2 | 3,644  | 3,642  | 35.2 | 3,753  | 3,751  | 35.2 | 3,895  | 3,893  | 36.2 |

A product development based service that uses its operating budget to co-ordinate, oversee and provide functional expertise to core Assessment operations. The operating budget is adding an FTE in 2018 in order to deal with the growth in data processing requirements that stem from a growing city. Primary responsibilities include assisting Valuation in the preparation of property and business assessments through mass appraisal, statistical modelling, quality and audit functions. High level and detailed business planning and reporting are

also coordinated by this service to ensure effective operations that align with Council Priorities. Accurate data is the basis for fair and equitable assessments and this line of service is responsible for the coordination of this vital input, along with customer inquiry support, requests for information and liaising with tax agents. Lastly, this line of service oversees the defence of assessments and coordinates the assessment complaint process administered by the Assessment Review Board (ARB).

| Business Services | 2014   |        |      | 2015   |        |      | 2016   |        |      | 2017   |        |      | 2018   |        |      |
|-------------------|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|
|                   | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs |
|                   | 5,397  | 5,397  | 29.0 | 5,475  | 5,475  | 29.0 | 5,548  | 5,548  | 29.0 | 5,632  | 5,632  | 29.0 | 5,632  | 5,632  | 29.0 |

A product support based service that uses its operating budget to administer, manage and improve Assessment's business functions. The largest of these business functions is information technology. Other important business functions include human resource administration, project management, process capture and improvements. Additionally, this line of service is responsible for the coordination of finance/budget, safety administration, records management and administrative support. Business Services is not scheduled to receive any additional FTE growth during 2015-2018 and will be able to maintain service levels due to recent structural realignments.

Assessment's growth in staffing is not keeping pace with its workload growth so efficiency gains are essential in the upcoming years. Citizens are also asking for efficiency gains to be made by The City as noted within the Action Plan 2015-2018 engagement results. Listening to these two inputs, Business Services will lead Assessment's effort to become more efficient through process improvements and IT enhancements. Primary examples include streamlining Valuation processes, improving online services and the complete replacement of Assessment's core software system.

All \$ values are in Thousands (\$000)

| Customer & Governance Services | 2014   |        |      | 2015   |        |      | 2016   |        |      | 2017   |        |      | 2018   |        |      |
|--------------------------------|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|
|                                | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs |
|                                | 1,439  | 1,439  | 7.0  | 1,463  | 1,463  | 7.0  | 1,491  | 1,491  | 7.0  | 1,522  | 1,522  | 7.0  | 1,522  | 1,522  | 7.0  |

A product support based service that uses its operating budget to co-ordinate internal and external communications and governance. The most visible of these activities revolve around communications such as the annual mailing of Assessment Notices and the Customer Review Period. Other key activities include exemptions, policy and advocacy work. This work targets and responds to inquiries made by Council,

citizens, internal staff, other municipalities, the Province and other business units within The City. Customer and Governance Services is not scheduled to receive any additional FTE growth during 2015-2018 and will be able to maintain service levels due to internal process improvements.

| Valuation | 2014   |        |      | 2015   |        |      | 2016   |        |      | 2017   |        |      | 2018   |        |      |
|-----------|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|
|           | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs |
|           | 10,027 | 10,027 | 91.0 | 10,541 | 10,415 | 93.0 | 10,863 | 10,737 | 93.0 | 11,229 | 11,103 | 93.0 | 11,229 | 11,103 | 93.0 |

A product ownership based service that conducts Assessment's core operations and is the largest service within the business unit. Valuation uses its operating budget to annually prepare over 500,000 market value property and business assessments. This is done by applying mass appraisal methodologies to a large quantity of property and business data collected throughout the year. In 2014, these assessments provided the basis for the collection of \$2.23 billion property and business tax dollars.

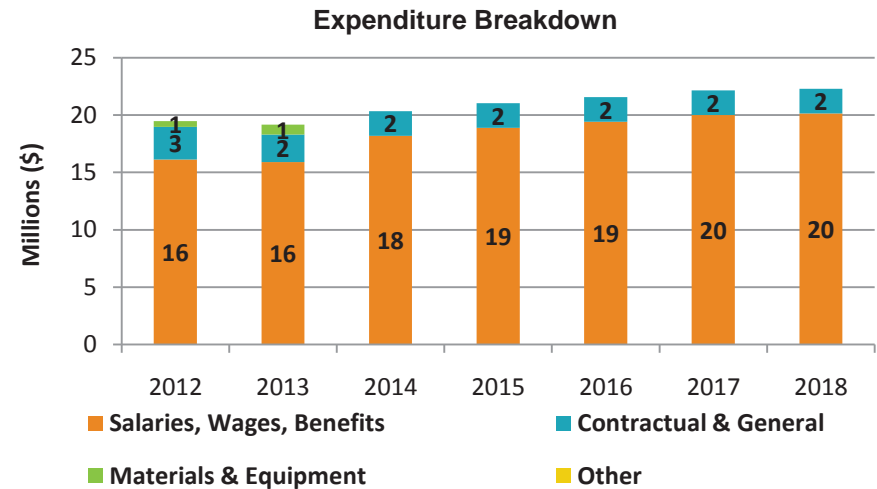
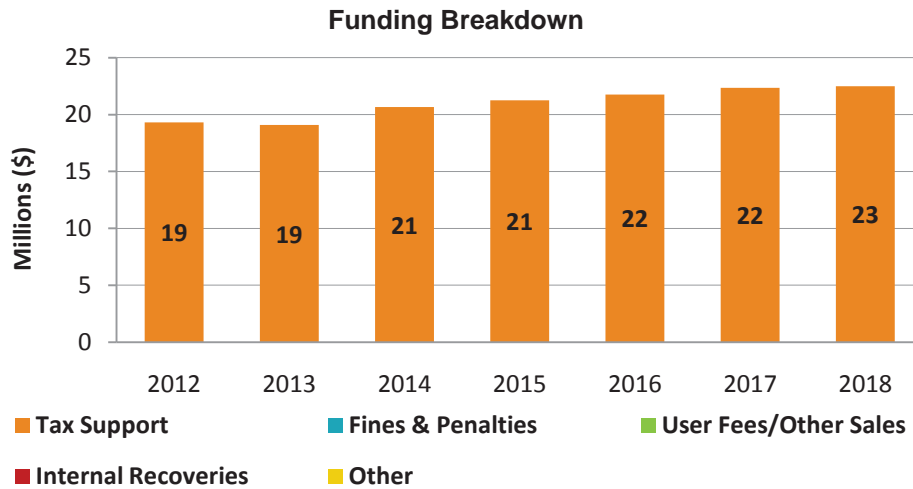
the property and business tax base for all customers – taxpayers, The City of Calgary, and the Province of Alberta.

Valuation also uses its operating budget to communicate those assessments to property and business owners and provide a high level of customer service. The defence of those assessments is also paid for by Valuation's operating budget should property and business owners not agree with their assessment and decide to complain to the Assessment Review Board (ARB). This maintains equity and stability of

Long standing Valuation performance measure targets are being changed to express Assessment's intent to continue improving the preparation, communication and defence of assessments. This is necessary to reflect the high standard that is expected of Assessment by its customers. These service improvements will be assisted by the addition of two FTEs in 2015. However, these two FTEs will not be enough to improve services to match targets. Therefore, service improvements will be achieved through streamlining processes and enhancing information technology which will be coordinated by Business Services. This is consistent with the Council Priority to have A well run city, specifically to be efficient and effective as possible, reducing costs and focusing on value for money.

## PDA: Assessment - Breakdown of the Operating Budget

Totals may not match due to rounding



**Funding Breakdown** - Almost 100 per cent of funding for the Assessment business unit is tax-supported. The level of funding coming from tax-support has been at a comparable level for many years now and there is no expectation that this will change in the future. The remainder of Assessment's funding is minimal and comes from user fee revenue.

**Expenditures** - Approximately 90 per cent of expenditures for the Assessment business unit go to salaries, wages and benefits. The level of expenditures going to salaries, wages and benefits has been at a similar level for many years now and there is no expectation that this will

change in the future. The remainder of Assessment's expenditures can mainly be characterized as contractual and general.

**User Fees / Charges / Utility Rates** - In 2015-2018, the Assessment business unit will be increasing their user fees for paper based assessment information requests. This change will result in full cost recovery, as well as encourage utilization of on-line services that are provided free to customers. Fees for 2015-2018 are detailed in Attachment 2 and have been drafted in accordance with User Fees and Subsidies Policy (CFO010).

**PDA: Assessment - Breakdown of the Net Operating Budget**

*Totals may not add due to rounding*

| <b>Breakdown of Net Operating Budget Changes (\$000s)</b> | <b>2015</b>   | <b>2016</b>   | <b>2017</b>   | <b>2018</b>   |
|---|---------------|---------------|---------------|---------------|
| Previous Year's Budget                                    | 20,663        | 21,241        | 21,766        | 22,358        |
| Less: Previous Year One Time                              | 0             | 0             | 0             | 0             |
| Base  | 20,663        | 21,241        | 21,766        | 22,358        |
| Efficiency Gains  | 0             | 0             | 0             | 0             |
| Inflation   | 472           | 525           | 592           | 0             |
| Service and Budget Increase                               | 106           | 0             | 0             | 142           |
| Operating Impact of Previously Approved Capital           | 0             | 0             | 0             | 0             |
| Operating Impact of New Capital (Incremental)             | 0             | 0             | 0             | 0             |
| Re-alignments   | 0             | 0             | 0             | 0             |
| One Time  | 0             | 0             | 0             | 0             |
| <b>Total Budget Change</b>                                | <b>578</b>    | <b>525</b>    | <b>592</b>    | <b>142</b>    |
| <b>Total Budget</b>                                       | <b>21,241</b> | <b>21,766</b> | <b>22,358</b> | <b>22,500</b> |

PDA was allocated limited increases to its overall operating allocation. Consequently, year over year changes to Assessment's operating budget are minimal, restricted to general salary and wage increases for tax-supported staff as well as salary and wages for 3 additional FTEs - 2 in 2015 and 1 in 2018.

The Assessment business unit's operating budget will receive salary and wage inflation increases from 2015-2017 due to established labour contracts. Salary and wage inflation for Management Exempt are not reflected in Assessment's operating budget.

The proposed increase of FTEs is intended to help Assessment address annual workload growth. This is currently estimated to be in the range of

a 2.0-2.7 per cent annual increase in property and business accounts and this increases will accommodate some, but not all of this growth.

In order to manage that gap, Assessment will be pursuing opportunities to become increasingly efficient with the resources available. These efficiencies will allow workload growth to be absorbed within Assessment's current staff compliment. Efficiency Gains are consequently being expressed as zero throughout 2015-2018 as they will be reinvested to address this workload growth. This approach aligns well with both long-term plans and citizen engagement results, which call for business units to employ a continual effort to do more with less. These efficiency-related advances will be tied primarily to process improvements and IT systems enhancements.

| <b>TCA Depreciation (\$000s) - Assessment</b> |             |             |             |
|---|-------------|-------------|-------------|
| <b>2015</b>                                   | <b>2016</b> | <b>2017</b> | <b>2018</b> |
| 122   | 129         | 133         | 122         |

*TCA Depreciation content is presented for information only.*



**PDA: Assessment - Operating Budget for Council Approval**

|                      |
|----------------------|
| For Council Approval |
|----------------------|

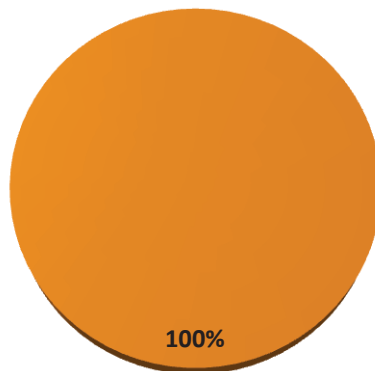
| <b>Assessment</b>  |                |                |  |             |              |        |             |              |        |             |              |        |             |              |        |
|--|----------------|----------------|--|-------------|--------------|--------|-------------|--------------|--------|-------------|--------------|--------|-------------|--------------|--------|
| <b>Total Operating Budget (\$000s) for Approval (Totals may not match due to rounding)</b> |                |                |  |             |              |        |             |              |        |             |              |        |             |              |        |
|  | 2012<br>Actual | 2013<br>Actual | 2014<br>Total<br>Budget<br>(as of<br>June<br>30) | 2015 Budget |              |        | 2016 Budget |              |        | 2017 Budget |              |        | 2018 Budget |              |        |
|  |                |                |  | Base        | One-<br>Time | Total  | Base        | One-<br>Time | Total  | Base        | One-<br>Time | Total  | Base        | One-<br>Time | Total  |
| Expenditures   | 19,480         | 19,161         | 20,665   | 21,369      | 0            | 21,369 | 21,894      | 0            | 21,894 | 22,486      | 0            | 22,486 | 22,628      | 0            | 22,628 |
| Recoveries   | 0              | 0              | 0  | 0           | 0            | 0      | 0           | 0            | 0      | 0           | 0            | 0      | 0           | 0            | 0      |
| Revenue  | (155)          | (85)           | (2)  | (128)       | 0            | (128)  | (128)       | 0            | (128)  | (128)       | 0            | (128)  | (128)       | 0            | (128)  |
| Net  | 19,325         | 19,075         | 20,663   | 21,241      | 0            | 21,241 | 21,766      | 0            | 21,766 | 22,358      | 0            | 22,358 | 22,500      | 0            | 22,500 |
| FTEs   | 159.2          | 163.2          | 164.2  | 166.2       | 0.0          | 166.2  | 166.2       | 0.0          | 166.2  | 166.2       | 0.0          | 166.2  | 167.2       | 0.0          | 167.2  |

## PDA: Assessment - Capital Budget Overview

| Assessment  |       |       |       |       |        |        |
|---|-------|-------|-------|-------|--------|--------|
| Capital Budget (\$000s) Overview (Totals may not match due to rounding) |       |       |       |       |        |        |
|   | 2015  | 2016  | 2017  | 2018  | *2019+ | Total  |
| Previously-Approved Budget (as at 2014 June 30)                         |       |       |       |       | 0      | 0      |
| Total New Capital Budget Requests                                       | 4,800 | 2,700 | 3,400 | 4,700 | 0      | 15,600 |
| Total Business Unit Capital Budget                                      | 4,800 | 2,700 | 3,400 | 4,700 | 0      | 15,600 |

\*2019+ represents projects which start within the 2015-2018 cycle and which are completed in years beyond 2018.

**Assessment**  
**New Capital Budget Requests by Project Type**  
**(2015-\*2019+)**  
**Total \$16 Million**



■ Upgrades

**Upgrades** - The Assessment business unit is dependent on the Calgary Integrated Assessment Office (CIAO) software system to annually prepare, communicate and defend over 500,000 annual property and business assessments. CIAO in its current state will not be supported by the vendor by 2019. A detailed impact analysis and market scan has been undertaken, which has led to an approved approach for dealing with this issue. The resultant Assessment Systems Improvement program will be rolled out over 2015-2019. Its main intent will be to have a new assessment specific software system in place for 2020.

This new software will maintain all of the data-sharing relationships required by numerous other business units across The City. It will also result in an improved and more stable assessment specific software system that can be used for years to come. The property and business assessments prepared, communicated and defended by Assessment provides the basis for the collection of over \$2.23 billion of property and business tax dollars in 2014. The Assessment Systems Improvement program will ensure that any risk to this important revenue source, which comprises approximately 50 per cent of the total operating budget for The City, is appropriately managed. It will also enable Assessment to pursue efficiency gains as directed via the Council Priorities and a major theme identified through citizen engagement. Lastly, the Assessment Systems Improvement program is critical for Assessment to continue to provide quality services despite workload growth which exceeds staffing growth.

## PDA: Assessment - Capital Budget Overview

| Funding for Capital Projects (Totals may not match due to rounding) | 2015         | 2016         | 2017         | 2018         | *2019+   | Total 2015-*2019+ |
|---|--------------|--------------|--------------|--------------|----------|-------------------|
| <i>Lifecycle Maintenance &amp; Upgrade Reserve</i>                  | 4,800        | 2,700        | 3,400        | 4,700        | 0        | 15,600            |
| <b>Total Funding</b>  | <b>4,800</b> | <b>2,700</b> | <b>3,400</b> | <b>4,700</b> | <b>0</b> | <b>15,600</b>     |

\*2019+ represents projects which start within the 2015-2018 cycle and are completed in years beyond 2018.

### Capital Budget Listing (by Program - Project) (\$000s)

| Program-<br>Project                                       | Project Description            | Type | Cat | Prev.<br>Approved<br>Budget up<br>to 2014 | Prev.<br>Approved<br>Budget<br>for future<br>years | New<br>Budget<br>Request | 2015  | 2016  | 2017  | 2018  | *2019+ | 2015-<br>*2019+ | Growth<br>Area |
|---|--------------------------------|------|-----|---|--|--------------------------|-------|-------|-------|-------|--------|-----------------|----------------|
| 153-001   | Assessment Systems Improvement | U    | C   |   |  | 15,600                   | 4,800 | 2,700 | 3,400 | 4,700 |        | 15,600          |                |
| <b>Total Program 153 : Assessment Systems Improvement</b> |                                |      |     | -   | -  | 15,600                   | 4,800 | 2,700 | 3,400 | 4,700 | -      | 15,600          |                |
|   |                                |      |     | -   | -  | 15,600                   | 4,800 | 2,700 | 3,400 | 4,700 | -      | 15,600          |                |

Note:

Type: M=Maintenance/Replacement, U=Upgrade, G=Growth, S=Service Change

Category: A=Project in Progress, C=New Project, O1=2015-2018 Operating Cost, O2=2019 and beyond Operating Cost

## Explanation of Budget Requests

### **Program 153 : Assessment Systems Improvement**

#### **153-001 Assessment Systems Improvement**

The Assessment Systems Improvement program will result in the CIAO software system being replaced by the end of 2019. This is needed as 2019 is the last year that CIAO will be supported by the vendor. Assessment is dependent on this software system to prepare, communicate and defend over 500,000 annual property and business assessments so it must be supported. No additional operating resources are expected to be required and the program is funded through the Lifecycle Maintenance and Upgrade Reserve.

**PDA: Assessment** - Capital Budget for Council Approval

For Council Approval

| <b>Assessment</b>  |             |              |              |              |              |               |                                |
|--|-------------|--------------|--------------|--------------|--------------|---------------|--------------------------------|
| <b>Capital Budget (\$000s) for Approval</b> (Totals may not match due to rounding) |             |              |              |              |              |               |                                |
|  | <b>2014</b> | <b>2015</b>  | <b>2016</b>  | <b>2017</b>  | <b>2018</b>  | <b>*2019+</b> | <b>Total<br/>(2015-*2019+)</b> |
| Previously-Approved Budget (as at 2014 June 30)                                    | 0           | 0            | 0            | 0            | 0            | 0             | 0                              |
| <b>Projects Requiring Approval</b>   |             |              |              |              |              |               |                                |
| <i>Program 153 : Assessment Systems Improvement</i>                                |             | 4,800        | 2,700        | 3,400        | 4,700        | 0             | 15,600                         |
| <b>Total Projects Requiring Approval</b>   |             | <b>4,800</b> | <b>2,700</b> | <b>3,400</b> | <b>4,700</b> | <b>0</b>      | <b>15,600</b>                  |
| Total Capital Budget   | 0           | 4,800        | 2,700        | 3,400        | 4,700        | 0             | 15,600                         |

*\*2019+ represents projects which start within the 2015-2018 cycle and are completed in years beyond 2018.*

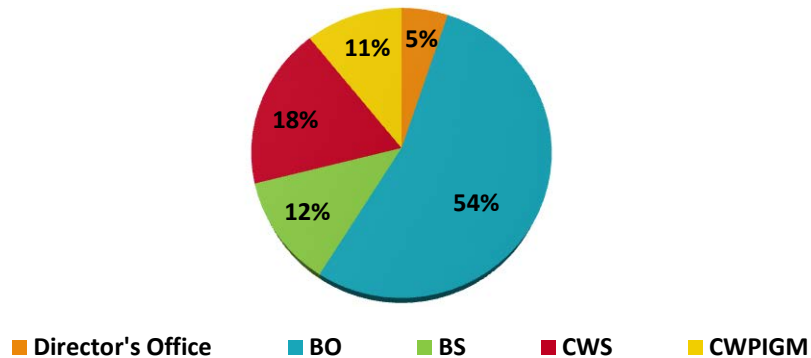
# City Wide Policy & Integration

## PDA: City Wide Policy & Integration - Overview

City Wide Policy & Integration (CPI) oversees departmental strategy, both for planning and for the business of planning and development. CPI helps to set, implement, and monitor land use plans and regulations at the regional and city wide level, while providing expertise in heritage planning and urban design. Land use and demographic forecasting is prepared, maintained and monitored by this business unit. CPI also leads the corporation's growth management framework.

CPI designs and delivers the tools and electronic services that help the Local Area Planning & Implementation and Inspection & Permit Services business units deliver efficient, helpful service to their customers. CPI connects with clients to measure and monitor performance, and supports the department in aiming high and growing smart by continually balancing long term goals with the needs of customers.

**City Wide Policy & Integration**  
**Gross Operating Expenditure by Line of Service**  
**(2015-2018)**



Values may not sum to 100%, due to rounding.

### **Business Operations (BO)**

Business Operations supports and enables the business of planning and development by provisioning services and tangible benefits that create business value and deliver innovative results for our clients.

### **Business Strategy (BS)**

Business Strategy leads in the coordination of departmental business planning and budget preparation, reporting and performance measurement. Business Strategy leads the departmental Customer Relationship Management Program.

### **City Wide Strategy (CWS)**

City Wide Strategy contributes to creating a great city by delivering a broad range of policy, regulation, specialized planning expertise and services to support decision making.

### **Growth Management (CWPIGM)**

Growth Management supports the coordination of policy and infrastructure to ensure that growth is aligned to meet the objectives of the Municipal Development Plan and the Calgary Transportation Plan.

## PDA: City Wide Policy & Integration - Overview

### Trends

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The flood event of 2013 highlighted the imperative of resiliency in the city – not just related to the flood, but in the ability to recover from other environment and disaster related impacts. CPI plays an important role in this: both strategically, in stewarding the Municipal Development Plan (MDP); and operationally, by ensuring the land use bylaw contains the rules necessary to help protect the safety of citizens.

Over the next 50-60 years, Calgary is expected to grow by another 1.3 million people. Since 2005, 94 per cent of population growth has occurred in the newly developed areas of the city. Recent trends do show an increasing proportion of growth in existing communities, and CPI plays a role in building on that. Redevelopment in existing communities supports population growth, and in making better use of existing infrastructure it makes good financial sense for The City and citizens.

In both new and existing communities, citizens want to live, work and grow old in places that offer a wide range of services and amenities. To support quality of life for citizens, development and redevelopment must occur in ways that support transit, cycling and walking; and provision of local amenities. Plans for both developing and developed communities must balance these wants and costs to maintain a financially viable and a resilient City, while striving to meet the needs of citizens.

Personalizing service and increasing the use of technology are key pieces of providing quality customer service. CPI meets these needs on two fronts. Delivering a robust customer relationship management program, supports the department in connecting and working with customers in a variety of ways to assess service delivery and identify improvements. Then, once improvements are identified, CPI develops the web and technology solutions to deliver them, and train our employees

on service standards.

As Baby Boomer retirements continue to quickly rise, PDA must remain an employer that can attract new talent and resources. Incentives such as work/life balance and interesting work must be marketed to attract new talent. Knowledge management and transfer of that knowledge to new employees are critical to meet demands in a rapidly evolving workforce.

### Long-Term Plans

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The 2020 Sustainability Direction and imagineCalgary strongly influence the Municipal Development Plan, which is the long-term statutory plan stewarded by CPI. Corporate Growth Management and City Wide Strategy seek to align City actions and investments with the goals of the MDP and its 'partner' document, the Calgary Transportation Plan (CTP).

CPI is accountable for and to a number of other long term plans. The Calgary Heritage Strategy describes a strategic, long-term approach to support the preservation of Calgary's historic resources with the goal of creating a visionary, credible and corporately aligned strategy which positions Calgary as a Canadian leader in historic preservation. The South Saskatchewan Regional Plan, developed by the province under the provincial Land Use Framework, is a regional land-use plan for Southern Alberta that addresses economic development, environmental management and social concerns. And The Land Use Bylaw outlines all land use districts and is an important tool for implementing the policies of the MDP and local area plans.

City Wide Policy & Integration leads the creation and implementation of a city-wide strategy to meet the growth targets of the MDP/CTP. This includes identifying issues and land use planning requirements, determining infrastructure capacity, and identifying opportunities,



## **PDA: City Wide Policy & Integration - Overview**

constraints and service levels in our existing communities. This is complemented by monitoring growth and change through tracking land supply, population and job forecast distributions, and analysis of City infrastructure needs. It is also linked to the growth management portfolio which leads implementation of the growth management framework. The Growth Management Framework coordinates planning approvals with capital and operating budgets and ensures that resources available to support growth are deployed as efficiently as possible.

### **Citizen Engagement**

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Affordable housing was a priority voiced by citizens during Action Plan engagement. The work of CPI attempts to address affordability through provision of diversity in housing choice; efficient growth patterns; and development that supports transit, cycling and walking, and provision of local amenities (mobility and local amenities are important for all citizens of Calgary, and this was another theme in the Action Plan engagement). Affordable housing is also supported by CPI through the staffing of a position intended to support affordable housing applicants work through the planning application process. Lastly, CPI's work on investigating new or revised policies, rules and guidelines for secondary suites supports the affordable housing priority.

A desire for less urban sprawl and a more integrated approach to planning was another theme from Action Plan engagement. CPI is addressing this theme through leading on a redevelopment strategy that will meet the objectives of the MDP; and through our growth management framework which is intended to ensure logical sequencing of growth, in new and existing communities, in a manner that is financially viable for The City.

Citizens also said that more collaboration among City departments and business units, and less red tape, is important. CPI continues to work

on both these fronts through close partnerships within PDA and across The City, developing and implementing one-window solutions and electronic solutions for customers. We also work closely with Corporate Planning Applications Group (CPAG) partners to refine and rebuild outcome-focused workflows for CPAG applications. The new 'research and development' function for CPAG allows for continual testing and piloting of new ideas toward the creation of a more nimble, responsive applications process.

Feedback gathered from customer focus groups led to the development of a biennial customer satisfaction survey and a customer service index to identify the opportunities for improvement and the key drivers of customer satisfaction in planning and development. The index is used as a tool to prioritize initiatives to increase customer satisfaction. Ongoing engagement with customers and stakeholders is also used to prioritize online services and ensure a focus on efficient service delivery that meet the needs of customers and stakeholders.

A customer-centric web strategy was developed as an outcome of customer and employee feedback and is applied to all planning and development initiatives; identifying opportunities to increase shared value for citizens and staff, and improve the online customer experience.

### **Council Priorities**

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CPI contributes to the Council Priority areas of a prosperous city; a city of inspiring neighbourhoods; a healthy and green city; and a well-run city. Growth Management and City Wide Strategy efforts are integral to achieving the best possible development outcomes within financial capacities, and advancing MDP and CTP targets. CPI actions are intended to align industry, council, and business unit growth decisions and provide the tools and information to make effective decisions.

## **PDA: City Wide Policy & Integration - Overview**

Regarding A prosperous city, CPI works with industry on opportunities to innovate, improve customer service and cut red tape. CPI strives to make it easier to do business with PDA by making PDA processes and outcomes more predictable.

For A city of inspiring neighbourhoods, CPI plays a leading role in the development of new funding frameworks to provide infrastructure in new and redeveloping neighbourhoods. Central to this effort will be facilitation of updates to the Standard Development Agreement and Subdivision Agreement. CPI also has a significant role to play in protection of heritage resources and development of great communities, buildings and public spaces critical components of inspiring neighbourhoods. Work will continue implementing recommendations and building on successes originating from the Calgary Heritage Strategy. CPI, in coordination with Office of Land Servicing and Housing (OLSH), supports the increase of affordable housing by exploring and implementing new mechanisms to support affordable housing options and through implementation of decisions related to secondary suites.

CPI leads The City's actions to comply with the South Saskatchewan Regional Plan in relation to A healthy and green city.

CPI plays a critical supporting role for all planning and development functions in achieving A well run city. Business Operations and Business Strategy services lead the way in involving performance measurement and financial information, implementing work space efficiencies, and managing planning and development assets. Business Strategy coordinates initiatives related to customer service improvements and learning and knowledge management, giving staff the tools, training, and feedback needed to provide exceptional results.

For Council Approval

**Planning, Development & Assessment Commitment:**

PDA is committed to being an effective business partner to citizens, business, and partners. PDA will make it easier to do business with The City by facilitating understanding and predictability of planning and building processes and outcomes.

A prosperous city  
Calgary continues to grow as a magnet for talent, a place where  
there is opportunity for all, and the best place in Canada  
to start and grow a business.

| Strategy Related to Council Outcome  | Business Unit Action Related to Strategy   | Accountable Service |
|--|--|---------------------|
| P1 Strengthen Calgary's position as a global energy centre and location of choice for international talent, investment and innovation through enhanced business development, marketing and place-making initiatives. | P1.1 Develop and implement a targeted communication strategy to improve The City's reputation as a great place to do business                            | BS                  |
|  | P1.2 Increase PDA participation in industry groups   | BS, CWS             |
| P2 Advance purposeful economic diversification and growth.   | P2.1 Implement recommendations from the Central Industrial Areas Land Review   | CWS                 |
|  | P2.2 Engage industry, working closely with Calgary Economic Development to better coordinate efforts to advance purposeful economic diversity and growth | BS                  |



For Council Approval

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**Planning, Development & Assessment Commitment:**

PDA is committed to being an effective business partner to citizens, business, and partners. PDA will make it easier to do business with The City by facilitating understanding and predictability of planning and building processes and outcomes.

|   |  |                            |
|---|--|----------------------------|
| <p>P3 Support civic, business and community partners, as well as business revitalization zones, to collaborate and attract local and global investment.</p> | <p>P3.1 Continue to research and develop opportunities for planning and development innovation</p>   | <p>BO, BS, CWPIGM, CWS</p> |
| <p>P4 Cut red tape and continue to foster a competitive tax environment to help small business succeed.</p>   | <p>P3.2 Build a reputation for being knowledgeable in our field of expertise and helpful in achieving deadlines</p>                                | <p>BO, BS, CWPIGM, CWS</p> |
| <p>P4 Cut red tape and continue to foster a competitive tax environment to help small business succeed.</p>   | <p>P4.1 Improve transparency and understanding of the planning system by standardizing and optimizing internal business practices and policies</p> | <p>BO, BS, CWPIGM, CWS</p> |
| <p>P6 Increase affordable and accessible housing options.</p>   | <p>P4.2 Improve citizen/business outreach by making information more useful/useable and available in more languages</p>                            | <p>BO</p>                  |
| <p>P6 Increase affordable and accessible housing options.</p>   | <p>P4.3 Facilitate self-service by increasing the availability of on-line tools.</p>   | <p>BO</p>                  |
| <p>P6 Increase affordable and accessible housing options.</p>   | <p>P6.1 Support corporate direction and implementation actions related to secondary suites</p>   | <p>BO, BS, CWS</p>         |
| <p></p>   | <p>P6.2 Monitor related land supply initiatives and provide policy support</p>   | <p>CWS</p>                 |



**PDA: City Wide Policy & Integration - Actions for Council Approval**

For Council Approval

A prosperous city  
 Calgary continues to grow as a magnet for talent, a place where  
 there is opportunity for all, and the best place in Canada  
 to start and grow a business.

**Planning, Development & Assessment Commitment:**  
 PDA is committed to being an effective business partner to citizens, business, and partners. PDA will make it easier to do business with The City by facilitating understanding and predictability of planning and building processes and outcomes.

P6 Increase affordable and accessible housing options.

P6.3 Explore and implement new mechanisms to support affordable housing options

CWS

P10 Expand our library system and enhance access to technology and information.

P10.1 Improve public access to PDA stewarded information

BO, BS, CWPIGM, CWS

P10.2 Improve PDA information management practices

BO, BS, CWPIGM, CWS



For Council Approval

**Planning, Development & Assessment Commitment:**

PDA works with all stakeholders to create complete communities, encouraging diversity in amenities, housing types, activities and services to create places where all citizens can make choices about their quality of life.

A city of inspiring neighbourhoods  
Every Calgarian lives in a safe, mixed and just neighbourhood,  
and has the opportunity to participate in civic life.

| Strategy Related to Council Outcome  | Business Unit Action Related to Strategy   | Accountable Service |
|--|--|---------------------|
| N3 Enhance The City's capacity and resiliency to prepare for and respond to pandemics, natural disasters and emergency situations. | N3.1 Further develop and implement a business continuity plan and risk management strategy   | BO                  |
| N5 Systematically invest in established neighbourhoods as they evolve to accommodate changing community needs.                     | N3.2 Amend land use policy and regulation as necessary to support and implement resiliency initiatives   | CWS                 |
|  | N5.1 Implement coordinated redevelopment strategies that promote increased population and employment in activity centres and along urban and neighbourhood corridors identified in the MDP | CWPIGM, CWS         |
|  | N5.2 Identify and support investments in capital infrastructure that supports the evolution and growth of inner city and established communities   | CWPIGM, CWS         |



For Council Approval

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and has the opportunity to participate in civic life.

**Planning, Development & Assessment Commitment:**

PDA works with all stakeholders to create complete communities, encouraging diversity in amenities, housing types, activities and services to create places where all citizens can make choices about their quality of life.

|   |   |                    |
|---|---|--------------------|
| <p>N6 Manage and promote growth to achieve the best possible social, environmental and economic outcomes within financial capacities.</p> | <p>N6.1 Develop and implement growth management strategies to enable development of complete communities</p>  | <p>CWPIGM</p>      |
|   | <p>N6.2 Work with stakeholders to enhance the development sequencing process</p>  | <p>CWPIGM</p>      |
| <p>N7 Develop a new funding framework to provide for infrastructure in new and redeveloping neighbourhoods.</p>                           | <p>N7.1 Work with City and industry stakeholders to update and implement a Standard Development Agreement and a new Subdivision Agreement</p>                 | <p>CWPIGM, CWS</p> |
|   | <p>N7.2 Investigate and promote new and innovative financing techniques and partnerships to provide infrastructure in new and redeveloping neighbourhoods</p> | <p>CWPIGM, CWS</p> |
| <p>N8 Make it easier to build developments that meet our Municipal Development Plan and Calgary Transportation Plan objectives.</p>       | <p>N8.1 Monitor and report on MDP success</p>   | <p>BS, CWS</p>     |
|   | <p>N8.2 In collaboration with stakeholders, address issues and opportunities related to achieving MDP/CTP implementation</p>                                  | <p>BS, CWS</p>     |



For Council Approval

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and has the opportunity to participate in civic life.

**Planning, Development & Assessment Commitment:**

PDA works with all stakeholders to create complete communities, encouraging diversity in amenities, housing types, activities and services to create places where all citizens can make choices about their quality of life.

|  |   |                    |
|--|---|--------------------|
| <p>N8 Make it easier to build developments that meet our Municipal Development Plan and Calgary Transportation Plan objectives.</p>  | <p>N8.3 Review and optimize roles and responsibilities for MDP/CTP implementation</p>   | <p>BO, BS, CWS</p> |
|  | <p>N8.4 Continue to implement improvements to application processes</p>   | <p>BO, BS</p>      |
| <p>N9 Provide great public spaces and public realm improvements across the city to foster opportunity for well used public spaces and places for citizen connections and urban vitality.</p> | <p>N9.1 Ensure early integration of urban design and public realm design conversations into all aspects of the planning process in order to maximize desired outcomes</p> | <p>CWS</p>         |
|  | <p>N9.2 Complete the development of Urban Design guidelines for all urban forms</p>   | <p>CWS</p>         |
| <p>N10 Review The City's heritage processes to improve the protection and enhancement of heritage assets.</p>  | <p>N10.1 Review and build on existing incentive programs to improve and support effective rehabilitation and designation of heritage assets</p>                           | <p>CWS</p>         |
|  | <p>N10.2 Continue to develop the inventory of Municipal Historic Assets</p>   | <p>CWS</p>         |
|  | <p>N10.3 Further implementation of the Calgary Heritage Strategy</p>  | <p>CWS</p>         |





**PDA: City Wide Policy & Integration - Actions for Council Approval**

For Council Approval

**Planning, Development & Assessment Commitment:**  
 PDA will leverage land use and building processes to support healthy, environmentally and fiscal sustainable places.

A healthy and green city  
 We steward our air, land, and water while encouraging healthy lifestyles for all Calgarians.

| Strategy Related to Council Outcome   | Business Unit Action Related to Strategy  | Accountable Service |
|---|---|---------------------|
| H4 Work with our regional partners and the Government of Alberta on an integrated approach to the watershed.                  | H4.1 Lead The City's actions to comply with the South Saskatchewan Regional Plan and Land Stewardship Act working closely with Parks, Water Resources, and Transportation | CWS                 |
| H6 Continue to build public awareness and understanding of our shared responsibility to conserve and protect the environment. | H6.1 Promote sustainable built environments   | CWPIGM, CWS         |



For Council Approval

**Planning, Development & Assessment Commitment:**  
 PDA is pro-active and strategic in mitigating risks and finding opportunities for improvement. PDA will be involved in the community and build relationships with customers to provide services they have confidence in.

A well-run city  
 Calgary's government is open, responsive, accountable and transparent, delivering excellent services at a fair price. We work with our government partners to ensure we have the tools we need.

| Strategy Related to Council Outcome   | Business Unit Action Related to Strategy   | Accountable Service |
|---|--|---------------------|
| W1 Finalize a new City Charter with the province.   | W1.1 Lobby for governing legislation changes that allow services to be provided as efficiently and effectively as possible | CWS                 |
| W2 Be as efficient and effective as possible, reducing costs and focusing on value-for-money. | W2.1 Improve financial forecasts and reports to better manage and mitigate long-term financial risks                       | BS, CWS             |
|   | W2.2 Employ business intelligence tools and data analytics to monitor business risks and business performance              | BO, BS              |
|   | W2.3 Improve performance standards and targets and establish benchmarks that justify funding requirements and processes    | BO, BS, CWPIGM, CWS |
|   | W2.4 Complete and implement a long term workspace strategy   | BO                  |
|   | W2.5 Continue to implement business process management practices   | BO                  |



For Council Approval

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Calgary's government is open, responsive, accountable and transparent, delivering excellent services at a fair price. We work with our government partners to ensure we have the tools we need.

**Planning, Development & Assessment Commitment:**

PDA is pro-active and strategic in mitigating risks and finding opportunities for improvement. PDA will be involved in the community and build relationships with customers to provide services they have confidence in.

W5 Regularly collaborate and engage citizens to encourage participation in City decision-making, and better communicate the reasons for the decisions.

W5.1 Continue to develop stakeholder relationships to achieve positive outcomes

BO, BS, CWPIGM, CWS

W6 Effectively manage The City's inventory of public assets, optimizing limited resources to balance growth and maintenance requirements.

W6.1 Enhance long term planning for PDA technologies and assets

BO

W6.2 Explore opportunities to use new technologies

BO

W6.3 Keep up with new versions of critical supporting technology and optimize use of existing technologies to increase capacity

BO

W7 Continue to transform the organization to be more citizen-focused in its approach and delivery of service.

W7.1 Integrate customer service commitments and standards into Department and Business Unit programs and services by 2018 to drive program and service improvements

BO, BS, CWPIGM, CWS



For Council Approval

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**Planning, Development & Assessment Commitment:**  
 PDA is pro-active and strategic in mitigating risks and finding opportunities for improvement. PDA will be involved in the community and build relationships with customers to provide services they have confidence in.

W7 Continue to transform the organization to be more citizen-focused in its approach and delivery of service.

W7.2 Set clear expectations for staff and reinforce those through learning and development and recognition programs to empower staff to deliver excellent customer service

BO, BS, CWPIGM, CWS

W7.3 Establish service standards, metrics and targets incorporating customer feedback to provide responsive and quality service

BO, BS, CWPIGM, CWS

W7.4 Use customer metrics to drive service improvements, process efficiencies and value for money

BO, BS, CWPIGM, CWS

W9 Strive to be an employer of choice with a focus on addressing The City's aging workforce.

W9.1 Build an inclusive work place that is reflective of the greater community

BO, BS, CWPIGM, CWS

W9.2 Develop a PDA strategic workforce plan that responds to and forecasts work force trends

BO, BS, CWPIGM, CWS

W9.3 Develop and implement a strategic workforce learning and development plan that fosters a high performing culture

BO, BS, CWPIGM, CWS



For Council Approval

**Planning, Development & Assessment Commitment:**

PDA is pro-active and strategic in mitigating risks and finding opportunities for improvement. PDA will be involved in the community and build relationships with customers to provide services they have confidence in.

A well-run city  
 Calgary's government is open, responsive, accountable and transparent, delivering excellent services at a fair price. We work with our government partners to ensure we have the tools we need.

W10 Support the Corporate Safety Strategy

W10.1 Foster a risk-based health and safety focused culture

BO, BS, CWPIGM, CWS

W10.2 Improve reporting and follow up procedures for specific leading safety indicators, near misses and hazardous conditions

BO, BS, CWPIGM, CWS



**PDA: City Wide Policy & Integration - Lines of Service**

| <b>Breakdown of Operating Budget by Service (\$000) (Totals may not add due to rounding)</b> |        |        |       |        |          |       |        |          |       |        |          |       |        |          |       |
|--|--------|--------|-------|--------|----------|-------|--------|----------|-------|--------|----------|-------|--------|----------|-------|
|  | 2014   |        |       | 2015   |          |       | 2016   |          |       | 2017   |          |       | 2018   |          |       |
|  | \$ Exp | \$ Net | FTEs  | \$ Exp | \$ Net   | FTEs  | \$ Exp | \$ Net   | FTEs  | \$ Exp | \$ Net   | FTEs  | \$ Exp | \$ Net   | FTEs  |
| Director's Office  | 1,503  | 1,074  | 9.0   | 2,010  | 1,577    | 11.0  | 2,048  | 1,612    | 11.0  | 2,076  | 1,636    | 11.0  | 2,087  | 1,643    | 11.0  |
| Business Operations  | 18,858 | 18,858 | 73.0  | 20,605 | (10,747) | 73.5  | 21,171 | (10,996) | 73.5  | 21,773 | (11,375) | 73.5  | 22,231 | (11,718) | 73.5  |
| Business Strategy  | 4,744  | 4,744  | 28.0  | 4,755  | 4,755    | 26.0  | 4,833  | 4,833    | 26.0  | 4,907  | 4,907    | 26.0  | 4,954  | 4,954    | 26.0  |
| City Wide Strategy   | 6,656  | 6,431  | 43.0  | 7,224  | 6,999    | 40.0  | 7,569  | 7,344    | 41.0  | 7,031  | 6,806    | 41.0  | 7,070  | 6,845    | 41.0  |
| Growth Management  | 3,976  | 3,976  | 15.0  | 4,152  | 4,152    | 17.5  | 4,169  | 4,169    | 17.5  | 4,338  | 4,338    | 17.5  | 4,588  | 4,588    | 17.5  |
| Total Business Unit  | 35,737 | 35,083 | 168.0 | 38,746 | 6,736    | 168.0 | 39,790 | 6,962    | 169.0 | 40,125 | 6,312    | 169.0 | 40,930 | 6,312    | 169.0 |

As a result of the realignment, operational funding has been redistributed to this new business unit as it best reflects the new structure. Most of the operating budget is dedicated to salary and wage expenditures to pay for the planners and technological and business support staff that coordinate city-wide initiatives and enable front line services in Local Area Planning & Implementation and Inspections & Permit Services.

Indirect planning and development support costs such as training & certification, safety equipment and furniture, facilities charges, IT support, corporate services, and external services have been centralized

within the City Wide Policy & Integration business unit. This centralization enables efficient and equitable application of administrative resources across all planning and development products and services. Revenues earned from fees charged by Inspections & Permit Services are used to fund a portion of these supporting costs.

Year over year changes to the operating budget are minimal. As this new structure and its supporting processes stabilize; further analysis and review will be required and approval of additional changes to and/or redistribution of this operating budget may be requested.

## PDA: City Wide Policy & Integration - Lines of Service

All \$ values are in Thousands (\$000)

| Business Operations | 2014   |        |      | 2015   |          |      | 2016   |          |      | 2017   |          |      | 2018   |          |      |
|---------------------|--------|--------|------|--------|----------|------|--------|----------|------|--------|----------|------|--------|----------|------|
|                     | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net   | FTEs | \$ Exp | \$ Net   | FTEs | \$ Exp | \$ Net   | FTEs | \$ Exp | \$ Net   | FTEs |
|                     | 18,858 | 18,858 | 73.0 | 20,605 | (10,747) | 73.5 | 21,171 | (10,996) | 73.5 | 21,773 | (11,375) | 73.5 | 22,231 | (11,718) | 73.5 |

The division supports the business of CPI, IPS and LPI. We offer a wide range of services that delivers results for our clients. These results are achieved by providing administrative services, business analysis and logistics solutions; managing all assets including fleet and technology;

providing business process management services; and developing technology-based solutions, GIS mapping analysis, and 3D visualizations.

| Business Strategy | 2014   |        |      | 2015   |        |      | 2016   |        |      | 2017   |        |      | 2018   |        |      |
|-------------------|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|
|                   | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs |
|                   | 4,744  | 4,744  | 28.0 | 4,755  | 4,755  | 26.0 | 4,833  | 4,833  | 26.0 | 4,907  | 4,907  | 26.0 | 4,954  | 4,954  | 26.0 |

The division provides strategic planning and analysis complemented by performance metrics that guide the implementation of strategy. To facilitate this implementation, Business Strategy also develops employees (CPI, LPI, and IPS) so they have the knowledge, skills and

abilities to excel. Another key element of this division's contribution is project management consultation and support to ensure key strategies are implemented on time and on budget to key stakeholders.

| City Wide Strategy | 2014   |        |      | 2015   |        |      | 2016   |        |      | 2017   |        |      | 2018   |        |      |
|--------------------|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|
|                    | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs |
|                    | 6,656  | 6,431  | 43.0 | 7,224  | 6,999  | 40.0 | 7,569  | 7,344  | 41.0 | 7,031  | 6,806  | 41.0 | 7,070  | 6,845  | 41.0 |

This division sustains the Municipal Development Plan (MDP) and the Land Use Bylaw. This sustainment is accomplished by identifying actions to implement the MDP, developing means to monitor the progress of those actions, and assessing their effectiveness. To maintain consistency, City Wide Strategy prepares guideline documents that applicants and planners can use to achieve high quality places, buildings and communities. As well, the division creates tools that

provide incentives for heritage conservation.

City Wide Strategy supports the operations of the Calgary Planning Commission, Urban Design Review Panel, and the Subdivision and Development Appeal Board. This support requires the review of decision-making of these bodies to ensure efficiency, effectiveness, and progress towards building a great city.

| Growth Management | 2014   |        |      | 2015   |        |      | 2016   |        |      | 2017   |        |      | 2018   |        |      |
|-------------------|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|
|                   | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs |
|                   | 3,976  | 3,976  | 15.0 | 4,152  | 4,152  | 17.5 | 4,169  | 4,169  | 17.5 | 4,338  | 4,338  | 17.5 | 4,588  | 4,588  | 17.5 |

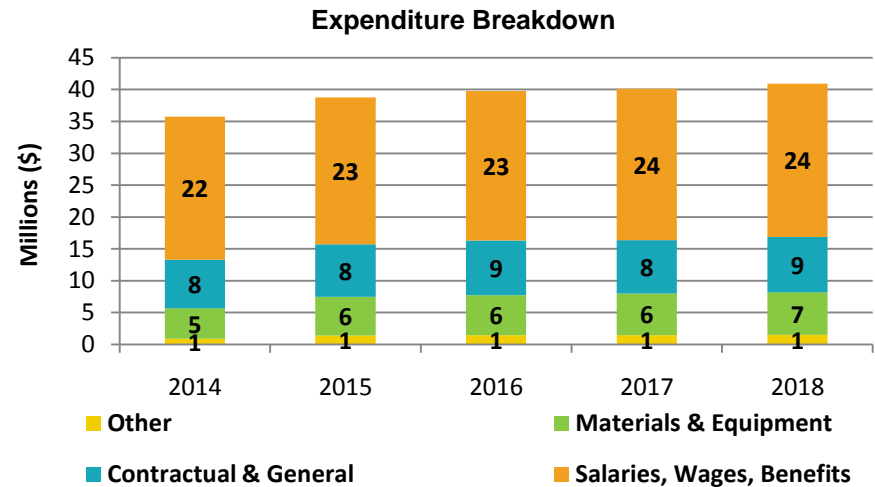
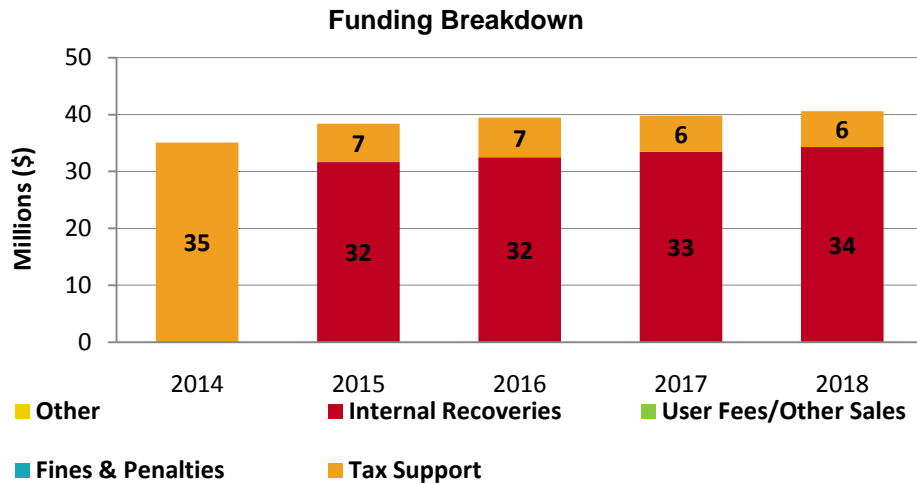
This division's mandate focuses on the integration of decision-making to align and prioritize The City's capital expenditures to meet financial and infrastructure capacity. One of the key inputs into this decision-making process is provided by Growth Management as it develops and manages a sequenced list of growth areas. This list supports the provision of a planned and adequate land supply is available to drive a healthy economy in Calgary.

Finally, the division supports the development and implementation strategies for developed areas, executes site specific Development Agreements at the subdivision approval stage, and supports the development of a Standard Development Agreement with key internal and external stakeholders.



**PDA: City Wide Policy & Integration - Breakdown of the Operating Budget**

*Totals may not match due to rounding*



**Funding Breakdown** - Budgeted funding for City Wide Policy & Integration functions primarily originates from user fees charged and collected for inspection and permitting activities. This revenue is used to pay for the technological and administrative support required to deliver these front line services.

Tax supported funding is applied to land use planning functions that benefit the overall look and feel of The City of Calgary over time such as growth management coordination, heritage structure preservation, and city-wide urban planning initiatives.

**Expenditures** - As a result of the realignment of DBA and LUPP in mid-2014, City Wide Policy & Integration functions as a strategic business unit in Planning, Development & Assessment. Centralization of administrative budgets for planning and development business units

promotes strategic use of funding and encourages standardization and efficiency in its administration and usage.

Operating budgets for planning and development mandatory learning and development are centralized in Business Strategy. Operating budgets for planning and development logistics, technology support, and administrative costs are centralized in Business Operations.

More than 60 per cent of CPI's operating budget is dedicated to salary and wages expenses for staff.

**User Fees / Charges / Utility Rates** - No user fees are charged by this business unit but a portion of the fees collected by Inspection & Permit Services is transferred to CPI to fund supporting administrative operations.

**PDA: City Wide Policy & Integration - Breakdown of the Net Operating Budget**

*Totals may not add due to rounding*

| <b>Breakdown of Net Operating Budget Changes (\$000s)</b> | <b>2015</b>     | <b>2016</b>  | <b>2017</b>  | <b>2018</b>  |
|---|-----------------|--------------|--------------|--------------|
| Previous Year's Budget                                    | 35,083          | 6,736        | 6,962        | 6,312        |
| Less: Previous Year One Time                              | 0               | (550)        | (650)        | 0            |
| Base  | 35,083          | 6,186        | 6,312        | 6,312        |
| Efficiency Gains  | 0               | 0            | 0            | 0            |
| Inflation   | 0               | (0)          | (0)          | (0)          |
| Service and Budget Increase                               | 0               | 126          | 0            | 0            |
| Operating Impact of Previously Approved Capital           | 0               | 0            | 0            | 0            |
| Operating Impact of New Capital (Incremental)             | 0               | 0            | 0            | 0            |
| Re-alignments   | (28,896)        | 0            | 0            | 0            |
| One Time  | 550             | 650          | 0            | 0            |
| <b>Total Budget Change</b>                                | <b>(28,346)</b> | <b>776</b>   | <b>(0)</b>   | <b>(0)</b>   |
| <b>Total Budget</b>                                       | <b>6,736</b>    | <b>6,962</b> | <b>6,312</b> | <b>6,312</b> |

Operating budget changes are minimal, restricted primarily to base salary and wage adjustments. Limited available PDA tax supported funds have been allocated to allow one additional FTE in 2016. This position will be used to support critical city-wide initiatives.

Investments in the departmental realignment, as well as in technology and process improvements, are expected to enable CPI to absorb the impact of on-going city growth over the next four years. Because the implementation of the departmental realignment occurred late in 2014, it

is still too early to determine a value for what capacity to absorb work or what level of general efficiencies has been gained before entering into this next planning cycle. PDA expects to bring forward an update to Council describing the results and benefits from these efforts sometime in 2015.

CPI is planning a number of capital projects. However, no impacts to the operating budget are expected.

| <b>TCA Depreciation (\$000s) - City Wide Policy &amp; Integration</b> |             |             |             |
|---|-------------|-------------|-------------|
| <b>2015</b>   | <b>2016</b> | <b>2017</b> | <b>2018</b> |
| 1,982   | 2,048       | 1,901       | 1,837       |

*TCA Depreciation content is presented for information only. CWPI's TCA Depreciation for vehicles are funded through its operating budget.*

**PDA: City Wide Policy & Integration - Operating Budget for Council Approval**

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|----------------------|
| For Council Approval |
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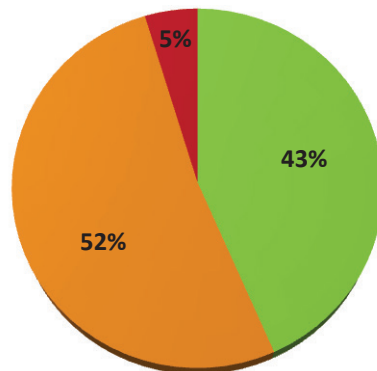
| <b>City Wide Policy &amp; Integration</b>  |                |                |  |             |              |              |             |              |              |             |              |              |             |              |              |
|--|----------------|----------------|--|-------------|--------------|--------------|-------------|--------------|--------------|-------------|--------------|--------------|-------------|--------------|--------------|
| <b>Total Operating Budget (\$000s) for Approval (Totals may not match due to rounding)</b> |                |                |  |             |              |              |             |              |              |             |              |              |             |              |              |
|  | 2012<br>Actual | 2013<br>Actual | 2014<br>Total<br>Budget<br>(as of<br>June<br>30) | 2015 Budget |              |              | 2016 Budget |              |              | 2017 Budget |              |              | 2018 Budget |              |              |
|  |                |                |  | Base        | One-<br>Time | Total        | Base        | One-<br>Time | Total        | Base        | One-<br>Time | Total        | Base        | One-<br>Time | Total        |
| Expenditures   | NA             | NA             | 35,737   | 38,196      | 550          | 38,746       | 39,140      | 650          | 39,790       | 40,125      | 0            | 40,125       | 40,930      | 0            | 40,930       |
| Recoveries   | NA             | NA             | (322)  | (31,675)    | 0            | (31,675)     | (32,489)    | 0            | (32,489)     | (33,469)    | 0            | (33,469)     | (34,271)    | 0            | (34,271)     |
| Revenue  | NA             | NA             | (332)  | (335)       | 0            | (335)        | (339)       | 0            | (339)        | (343)       | 0            | (343)        | (347)       | 0            | (347)        |
| Net  | NA             | NA             | 35,083   | 6,186       | 550          | <b>6,736</b> | 6,312       | 650          | <b>6,962</b> | 6,312       | 0            | <b>6,312</b> | 6,312       | 0            | <b>6,312</b> |
| FTEs   | NA             | NA             | 168.0  | 168.0       | 0.0          | <b>168.0</b> | 169.0       | 0.0          | <b>169.0</b> | 169.0       | 0.0          | <b>169.0</b> | 169.0       | 0.0          | <b>169.0</b> |

## PDA: City Wide Policy & Integration - Capital Budget Overview

| City Wide Policy & Integration  |       |       |       |       |        |        |
|---|-------|-------|-------|-------|--------|--------|
| Capital Budget (\$000s) Overview (Totals may not match due to rounding) |       |       |       |       |        |        |
|   | 2015  | 2016  | 2017  | 2018  | *2019+ | Total  |
| Previously-Approved Budget (as at 2014 June 30)                         | 1,000 | 0     | 0     | 0     | 0      | 1,000  |
| Total New Capital Budget Requests                                       | 6,950 | 9,350 | 9,950 | 6,550 | 0      | 32,800 |
| Total Business Unit Capital Budget                                      | 7,950 | 9,350 | 9,950 | 6,550 | 0      | 33,800 |

\*2019+ represents projects which start within the 2015-2018 cycle and which are completed in years beyond 2018.

**City Wide Policy & Integration  
New Capital Budget Requests by Project Type  
(2015-\*2019+)  
Total \$33 Million**



■ Maintenance ■ Upgrades ■ Growth

**Maintenance/Replacement** - This capital program is used to support permit and development processes. Most of the investment is directed to the internal supporting systems such as work management and payment processing software. Replacement of logistical assets such as vehicles and equipment used by inspections and permitting staff are also reflected in PDA's maintenance budget.

**Upgrades** - Capital investments are being made to replace critical supporting technology infrastructure. This program supports development and conversion of systems that support external customer facing services. This work enables transition of planning and building products on-line.

**Growth** - Budget investment in this category supports investment in infrastructure that leverages growth and place making activities and looks at entirely new technologies such as 3D visualization tools.

## PDA: City Wide Policy & Integration - Capital Budget Overview

| Funding for Capital Projects (Totals may not match due to rounding) | 2015         | 2016         | 2017         | 2018         | *2019+   | Total 2015-*2019+ |
|---|--------------|--------------|--------------|--------------|----------|-------------------|
| Capital Reserves  | 6,250        | 8,850        | 9,750        | 6,400        | 0        | 31,250            |
| Pay-As-You-Go   | 700          | 500          | 200          | 150          | 0        | 1,550             |
| <b>Total Funding</b>  | <b>6,950</b> | <b>9,350</b> | <b>9,950</b> | <b>6,550</b> | <b>0</b> | <b>32,800</b>     |

\*2019+ represents projects which start within the 2015-2018 cycle and are completed in years beyond 2018.

### Capital Budget Listing (by Program - Project) (\$000s)

| Program-<br>Project  | Project Description             | Type | Cat | Prev.<br>Approved<br>Budget up<br>to 2014 | Prev.<br>Approved<br>Budget<br>for future<br>years | New<br>Budget<br>Request | 2015  | 2016  | 2017  | 2018  | *2019+ | 2015-<br>*2019+ | Growth<br>Area |
|--|---------------------------------|------|-----|---|--|--------------------------|-------|-------|-------|-------|--------|-----------------|----------------|
| 061-002  | Capital Asset Lifecycle         | M    | C   |   |  | 8,250                    | 1,250 | 2,350 | 3,250 | 1,400 |        | 8,250           |                |
| <b>Total Program 061 : Capital Asset Acquisition</b>       |                                 |      |     | -   | -  | 8,250                    | 1,250 | 2,350 | 3,250 | 1,400 | -      | 8,250           |                |
| -----  |                                 |      |     |   |  |                          |       |       |       |       |        |                 |                |
| 067-002  | Business Technology Sustainment | U    | A   | 9,820                                     | 1,000  | 17,000                   | 3,500 | 5,000 | 5,000 | 3,500 | -      | 17,000          |                |
| 067-003  | Technology Upgrades             | M    | C   |   |  | 6,000                    | 1,500 | 1,500 | 1,500 | 1,500 | -      | 6,000           |                |
| 067-004  | 3D Services in Planning         | G    | C   |   |  | 1,550                    | 700   | 500   | 200   | 150   |        | 1,550           |                |
| <b>Total Program 067 : Business Technology Sustainment</b> |                                 |      |     | 9,820                                     | 1,000  | 24,550                   | 5,700 | 7,000 | 6,700 | 5,150 | -      | 24,550          |                |
| -----  |                                 |      |     |   |  |                          |       |       |       |       |        |                 |                |
|  |                                 |      |     | 9,820                                     | 1,000  | 32,800                   | 6,950 | 9,350 | 9,950 | 6,550 | -      | 32,800          |                |

Note:

Type: M=Maintenance/Replacement, U=Upgrade, G=Growth, S=Service Change

Category: A=Project in Progress, C=New Project, O1=2015-2018 Operating Cost, O2=2019 and beyond Operating Cost

## Explanation of Budget Requests

### **Program 061 : Capital Asset Acquisition**

#### **061-002 Capital Asset Lifecycle**

This program supports replacement of vehicles, computer equipment and printers, and improvements to physical spaces used by staff.

**Operating Impact of Capital:** None.

### **Program 067 : Business Technology Sustainment**

#### **067-002 Business Technology Sustainment**

This program addresses replacement and/or upgrades to internal support systems including work management tools, point of sale systems, records management, GIS systems, and progress workflow.

**Operating Impact of Capital:** None.

#### **067-003 Technology Upgrades**

This program supports development and conversion of systems that support external customer facing services. This work enables transition of planning and building products and service on-line.

**Operating Impact of Capital:** None.

#### **067-004 3D Services in Planning**

This project supports 3D visualization of proposed developments or redevelopments. This capability enables better communication with stakeholders and quicker identification and resolution of potential issues.

**Operating Impact of Capital:** None.

**PDA: City Wide Policy & Integration - Capital Budget for Council Approval**

|                      |
|----------------------|
| For Council Approval |
|----------------------|

| City Wide Policy & Integration  |        |              |              |              |              |          |                        |
|---|--------|--------------|--------------|--------------|--------------|----------|------------------------|
| Capital Budget (\$000s) for Approval (Totals may not match due to rounding) |        |              |              |              |              |          |                        |
|   | 2014   | 2015         | 2016         | 2017         | 2018         | *2019+   | Total<br>(2015-*2019+) |
| Previously-Approved Budget (as at 2014 June 30)                             | 15,251 | 1,000        | 0            | 0            | 0            | 0        | 1,000                  |
| Projects Requiring Approval   |        |              |              |              |              |          |                        |
| <i>Program 061 : Capital Asset Acquisition</i>                              |        | 1,250        | 2,350        | 3,250        | 1,400        | 0        | 8,250                  |
| <i>Program 067 : Business Technology Sustainment</i>                        |        | 5,700        | 7,000        | 6,700        | 5,150        | 0        | 24,550                 |
| <b>Total Projects Requiring Approval</b>                                    |        | <b>6,950</b> | <b>9,350</b> | <b>9,950</b> | <b>6,550</b> | <b>0</b> | <b>32,800</b>          |
| Total Capital Budget  | 15,251 | 7,950        | 9,350        | 9,950        | 6,550        | 0        | 33,800                 |

\*2019+ represents projects which start within the 2015-2018 cycle and are completed in years beyond 2018.

# Inspections & Permit Services

Tab8

Inspections &  
Permit Services

Tab7

Tab6

Tab5

Tab4

Tab3

Tab2

Tab1



### PDA: Inspection & Permit Services - Overview

Inspection & Permit Services (IPS) is the primary point of contact for customers for services including applications, permits, business licences and inspections. IPS ensures compliance with regulations governing development, building, use and occupancy. As a cost recovery business unit, lines of business help sustain service delivery models involving civic partners.

This business unit offers a variety of products and services to customers including: 3rd Floor intake counter, planning information support centre, business licensing (new/renewal), development site servicing plans, development permits, construction drawings, grade slips, trade permits & inspections (building, plumbing & gas, electrical, HVAC), certificate of compliance, home occupation approval, tenancy and address changes, pre-construction site safety meetings, demolition permits, and records centre.

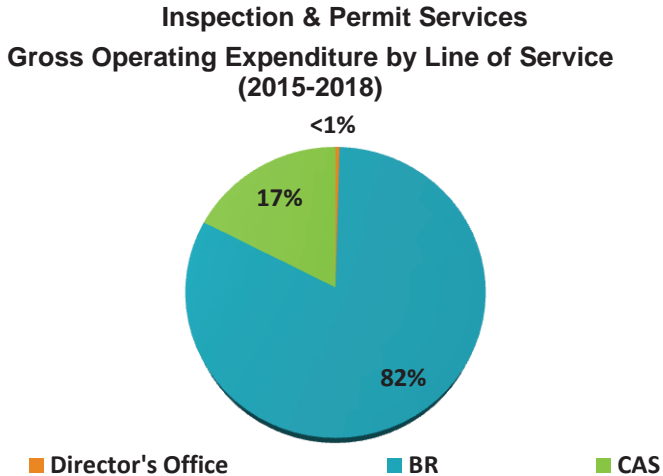
IPS participates, through industry committees and task groups, in the development and implementation of tools that govern safety and enhance related codes. It advocates for changes to legislation both provincially and nationally on building codes and it educates industry and the community on the regulations that apply to their projects. Building Regulations promotes excellence in construction site safety through industry engagement, education and enforcement.

#### Building Regulations (BR)

Building Regulations manages the permitting process for building and renovations through plan review, permit issuance, inspections, and enforcement of applicable codes to ensure public safety in Calgary.

#### Customer Advisory Services (CAS)

Customer Advisory Services acts as a single point of contact for customer transactions, operating a mixture of front counter, online, call centre, publication and administrative services, and manages the intake of business permit and licensing applications.



Values may not sum to 100%, due to rounding.

## PDA: Inspection & Permit Services - Overview

### Trends

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As the population of the city of Calgary continues to grow, development and construction activities continue to increase in volume and complexity. Inspection & Permit Services monitors and adapts to these trends, continuously improving the way it does business to maintain a high level of service and customer value.

In anticipation of the provincial review and adoption of the 2015 National Building Code (NBC), BR met with the Canadian Home Builders Association (CHBA) – Calgary Region to discuss the potential for six-story wood frame development in Calgary. BR continues to proactively address this matter with the construction industry, and continues to partner with the National Research Council committees in preparation for final code approvals of the 2015 NBC.

With higher frequency and intensity of extreme weather events in Calgary, PDA must take steps to enhance its ability to respond to and recover from floods and windstorms. These events pose a significant risk to The City and its citizens and it is critical that IPS be ready to protect the public and help them recover from these potentially catastrophic events. It will do so through the implementation of the Building Safety Emergency Management System.

Customer service standards are continually evolving and influenced by retail and private industry. Personalizing service and increasing the use of technology are key pieces of providing quality customer service. Working with CPI, IPS' efforts to provide mobile solutions, improve processes, enhance the customer experience, and offer one-stop shopping capabilities will have to accelerate over the next business cycle to meet evolving standards. IPS is working to provide greater and easier access to its products and services, and is shifting to a risk-based business approach. Additional products and services are being made available online to meet customer needs and business

trends. To create more concise ways of completing business transactions, processes are being carefully reviewed with stakeholder behaviours and user experience in mind.

As the city continues to thrive, workloads continue to increase. At the same time, the workforce is reaching retirement age and there is significant competition in attracting new employees. Creating an environment where staff can excel and leverage their skills and knowledge appropriately will be critical for maintaining customer satisfaction and levels of service.

### Long-Term Plans

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IPS is committed towards achieving Council Priorities and the long-term goals of the Municipal Development Plan by delivering the tangible services that facilitate and foster smart planning and development activities in the city. Ongoing efforts to simplify and streamline the products and services provided to industry and citizens will only make Calgary a more attractive place to live and work.

The business plan demonstrates IPS commitment to facilitating prosperity, growth and business development by supporting PDA's nextCity objectives including: Growth Management Strategy, Corridors Program, Redevelopment Implementation Plan and Centre City Implementation.

Moving our products and services online for our customers is part of the commitment to make it faster and easier to do business in Calgary. IPS is working closely with industry and citizens to facilitate development of these online solutions and incorporate their feedback into the end products to ensure they meet their needs and expectations. The City and its customers benefit from 24/7 access to online services by saving both time and money by eliminating paper transactions, avoiding courier

## **PDA: Inspection & Permit Services - Overview**

or travel costs to City hall and reducing wait times at the IPS service counter.

By participating with National code development and provincial safety programs, IPS is influencing the development of built communities in Canada. Striving to be a leader in the industry, IPS' expertise continues to provide sound guidance to the safety of the built form.

IPS is guided by the 2020 Sustainability Direction to strengthen neighbourhoods through community development by exploring incentives to increase the number of businesses that support sustainable practices.

### **Citizen Engagement**

Affordable housing was identified as a top priority in the Action Plan 2015-2018 public engagement campaign. Business, citizens and civic partners indicated housing affordability as a concern with negative impacts on attracting people to our city and on quality of life. IPS continues to participate and support opportunities for planning and development innovations including a mix of housing solutions. Reviewing policy rules and guidelines of Secondary Suites may provide development and income opportunities in established communities, allowing the retention of existing homes.

Encouraging development that supports aging in place by promoting the increase of housing that provides convenience for residents and a welcoming environment for people of all ages and mobility. All engagement input streams have identified public safety as a priority. IPS strongly supports this priority by collaborating with civic and industry partners. BR promotes excellence in construction site safety through industry engagement, education and enforcement and will address concerns of aging buildings with the implementation of a new building maintenance bylaw.

Our citizens also said that more collaboration among City departments and business units, and less red tape, is important. Commitment to improvements in the efficiency, transparency, and simplicity of inspections and permit processes and tools is integral to 2015-2018 plans. These efforts contribute to both A well-run city and A prosperous city outcomes by looking for ways to improve customer understanding and accessibility to services, as well as optimizing use of city resources in provision of those services.

### **Council Priorities**

IPS contributes to the Council Priority areas of a prosperous city, a city of inspiring neighbourhoods, and a well run city.

Regarding A prosperous city, IPS is committed to building a reputation as an effective business partner. Through coordination with civic, business, and community partners, as well as business revitalization zones, its services play a fundamental contribution to Calgary being an attractive place to do business. IPS addresses effectiveness and efficiency by working with stakeholders. Inspection processes will be aligned with industry practice, ensuring timely review of code requirements, support code development and ultimately, safe construction of the built form.

Regarding A city of inspiring neighbourhoods, IPS also plays a significant role in Council Strategy 'Respond to the needs of an aging population'. To support affordable and accessible housing options, BR will work with the Advisory Committee on Accessibility to update the Access Design Standards to align The City's requirements for the barrier-free design of City-owned properties with the Alberta Building Code. BR proactively seeks to promote the increase in housing options in new and established communities through initiatives that support aging in place.

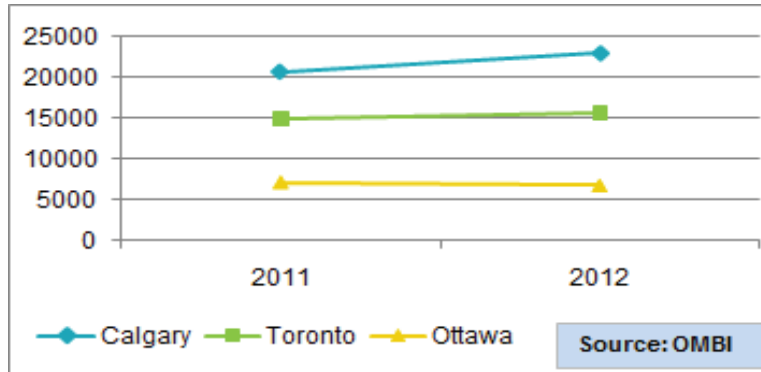
## **PDA: Inspection & Permit Services - Overview**

IPS helps to prepare the community to be resilient to future emergencies and has a critical role to play in helping businesses and citizens to resume their normal activities after an event.

Under A well run city, IPS supports both Corporate and Departmental customer service, safety and human resources strategic plans and is committed to participation in the Zero-Based Review program.

## PDA: Inspection & Permit Services - Benchmarking

### Volume of Building Permits Issued



Calgary is a busy and growing city. Inspection and permit volumes have been trending upwards. Permit volumes remained steady at 20,000+ from 2009 to 2011, increasing to 22,900 in 2012 and 24,800 in 2013.

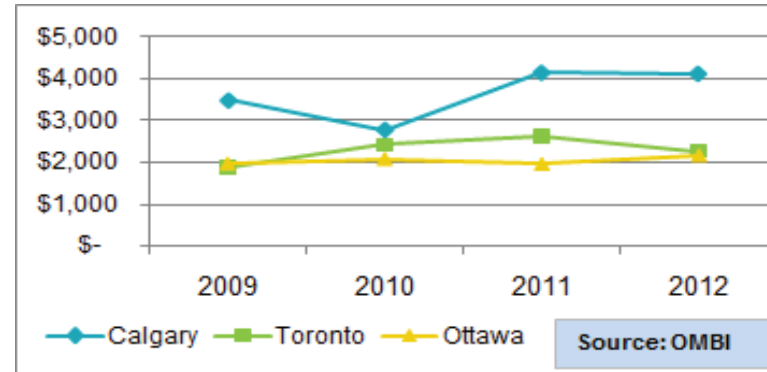
#### Learning and Best Practices

OMBI comparatives are limited at present, but Calgary volume estimates are significantly higher (40 per cent +) than those reported by other large cities. The outlook for Calgary is positive with a steady rate of growth expected over the coming years. This will continue to put pressure on staff to meet level of service expectations that are significantly higher than the pressure that may be felt in similar roles in other cities.

#### Improvement Initiatives & Action Plan 2015-2018

IPS participates in several provincial and national committees that will shape future code requirements. IPS is committed to meeting the needs of its customers in the most efficient way possible and supporting the development and well-being of its employees.

### Construction Value of Building Permits Issued Per Capita



High construction value projects, including offices, apartments, industrial spaces and retail spaces, continue to be approved and developed, changing Calgary's skyline and supporting Calgary's economic growth. In 2013, the estimated construction value per capita was \$5,365 showing the continuation of high investment levels and a positive economic outlook.

#### Learning and Best Practices

Increasing construction value is a result of several market forces but is often also an indicator of a project's complexity. IPS must realize efficiencies in order to sustain service standards while offering the additional attention required by projects of greater complexity.

#### Improvement Initiatives & Action Plan 2015-2018

To meet the service demands of complex projects, IPS seeks to improve productivity by: increasing the use of technology throughout the permitting and inspection processes including on-site code compliance inspections; continuing to implement workforce strategies to foster high performing culture; and implementing an outcomes based inspection strategy, streamlining processes for lower risk projects.

**PDA: Inspection & Permit Services - Actions for Council Approval**

For Council Approval

**Planning, Development & Assessment Commitment:**  
 PDA is committed to being an effective business partner to citizens, business, and partners. PDA will make it easier to do business with The City by facilitating understanding and predictability of planning and building processes and outcomes.

A prosperous city  
 Calgary continues to grow as a magnet for talent, a place where  
 there is opportunity for all, and the best place in Canada  
 to start and grow a business.

| Strategy Related to Council Outcome  | Business Unit Action Related to Strategy  | Accountable Service |
|--|---|---------------------|
| P1 Strengthen Calgary's position as a global energy centre and location of choice for international talent, investment and innovation through enhanced business development, marketing and place-making initiatives. | P1.1 Increase PDA participation in industry groups to enhance collaboration   | BR, CAS             |
| P3 Support civic, business and community partners, as well as business revitalization zones, to collaborate and attract local and global investment.   | P3.1 Continue to research and develop opportunities for planning and development innovation   | BR, CAS             |
|  | P3.2 Build a reputation as a leader in our field of expertise and a facilitator of business success   | BR, CAS             |
| P4 Cut red tape and continue to foster a competitive tax environment to help small business succeed.   | P4.1 Improve transparency and understanding of the planning system by standardizing and optimizing internal business practices and policies | BR, CAS             |



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P4 Cut red tape and continue to foster a competitive tax environment to help small business succeed.

P4.2 Implement an outcomes/risk based inspection strategy, incorporating appropriate use of audit and enforcement approaches

BR

P4.3 Improve citizen/business outreach by making information available in more languages

BR, CAS

P4.4 Facilitate self-service by increasing the availability of on-line tools

BR, CAS

P8 Respond to the needs of an aging population.

P8.1 Implement changes resulting from the Alberta Building Code's new adaptable dwelling unit requirements

BR, CAS

P8.2 Support greater accessibility to buildings for persons with disabilities

BR, CAS

P10 Expand our library system and enhance access to technology and information.

P10.1 Improve public access to PDA stewarded information.

BR, CAS

P10.2 Improve PDA information management practices.

BR, CAS



**PDA: Inspection & Permit Services - Actions for Council Approval**

For Council Approval

**Planning, Development & Assessment Commitment:**  
 PDA works with all stakeholders to create complete communities, encouraging diversity in amenities, housing types, activities and services to create places where all citizens can make choices about their quality of life.

A city of inspiring neighbourhoods  
 Every Calgarian lives in a safe, mixed and just neighbourhood,  
 and has the opportunity to participate in civic life.

| Strategy Related to Council Outcome  | Business Unit Action Related to Strategy   | Accountable Service |
|--|--|---------------------|
| N3 Enhance The City's capacity and resiliency to prepare for and respond to pandemics, natural disasters and emergency situations. | N3.1 Further develop and implement a business continuity plan and risk management strategy   | BR, CAS             |
| N5 Systematically invest in established neighbourhoods as they evolve to accommodate changing community needs.                     | N3.2 Implement a Building Safety Emergency Management System   | BR, CAS             |
|  | N5.1 Encourage development that supports aging in place by promoting the increase of housing that is convenient for residents and welcoming to visitors of all ages and mobility | BR                  |
|  | N5.2 Work cooperatively with the Province to improve building codes for fire safety for care facilities  | BR                  |





**PDA: Inspection & Permit Services - Actions for Council Approval**

For Council Approval

**Planning, Development & Assessment Commitment:**  
 PDA is pro-active and strategic in mitigating risks and finding opportunities for improvement. PDA will be involved in the community and build relationships with customers to provide services they have confidence in.

A well-run city  
 Calgary's government is open, responsive, accountable and transparent, delivering excellent services at a fair price. We work with our government partners to ensure we have the tools we need.

| Strategy Related to Council Outcome  | Business Unit Action Related to Strategy  | Accountable Service |
|--|---|---------------------|
| W2 Be as efficient and effective as possible, reducing costs and focusing on value-for-money.  | W2.1 Improve performance standards and targets and establish benchmarks that justify funding requirements and processes | BR, CAS             |
| W3 Examine opportunities for alternative service delivery for competitiveness.   | W3.1 Participate in a Zero-based Review in order to realize improvements in service efficiency and effectiveness        | BR, CAS             |
|  | W3.2 Implement the recommendations of the Zero-based Review   | BR, CAS             |
| W5 Regularly collaborate and engage citizens to encourage participation in City decision-making, and better communicate the reasons for the decisions. | W5.1 Continue to develop stakeholder relationships to achieve positive outcomes   | BR, CAS             |



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W7 Continue to transform the organization to be more citizen-focused in its approach and delivery of service.

W7.1 Integrate customer service commitments and standards into Department and Business Unit programs and services to drive program and service improvements

BR, CAS

W7.2 Set clear expectations for staff and reinforce those through learning and development and recognition programs to empower staff to deliver excellent customer service

BR, CAS

W7.3 Establish service standards, metrics and targets incorporating customer feedback to provide responsive quality service

BR, CAS

W7.4 Use customer metrics to drive service improvements, process efficiencies and value for money

BR, CAS

W9 Strive to be an employer of choice with a focus on addressing The City's aging workforce.

W9.1 Build an inclusive workplace that is reflective of the greater community

BR, CAS

W9.2 Develop a PDA strategic workforce plan that responds to and forecasts workforce trends

BR, CAS



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W9 Strive to be an employer of choice with a focus on addressing The City's aging workforce.

W9.3 Develop and implement strategic workforce learning and development plans that foster a high performing culture

BR, CAS

W10 Support the Corporate Safety Strategy

W10.1 Foster a risk-based health and safety focused culture

BR, CAS

W10.2 Improve reporting and follow up procedures for specific leading safety indicators, near misses, and hazardous conditions

BR, CAS



**PDA: Inspection & Permit Services - Lines of Service**

| <b>Breakdown of Operating Budget by Service (\$000) (Totals may not add due to rounding)</b> |               |                 |              |               |          |              |               |          |              |               |          |              |               |          |              |
|--|---------------|-----------------|--------------|---------------|----------|--------------|---------------|----------|--------------|---------------|----------|--------------|---------------|----------|--------------|
|  | 2014          |                 |              | 2015          |          |              | 2016          |          |              | 2017          |          |              | 2018          |          |              |
|  | \$ Exp        | \$ Net          | FTEs         | \$ Exp        | \$ Net   | FTEs         | \$ Exp        | \$ Net   | FTEs         | \$ Exp        | \$ Net   | FTEs         | \$ Exp        | \$ Net   | FTEs         |
| Director's Office  | 90            | 90              | 2.0          | 327           | 327      | 2.0          | 329           | 329      | 2.0          | 332           | 332      | 2.0          | 333           | 333      | 2.0          |
| Building Regulations   | 28,012        | (40,710)        | 177.0        | 58,102        | (12,645) | 177.0        | 60,067        | (12,979) | 177.0        | 62,072        | (13,349) | 177.0        | 64,500        | (13,373) | 177.0        |
| Customer Advisory Services   | 12,298        | 12,034          | 124.0        | 12,591        | 12,319   | 124.0        | 12,932        | 12,650   | 124.0        | 13,308        | 13,016   | 124.0        | 13,342        | 13,041   | 124.0        |
| <b>Total Business Unit</b>   | <b>40,400</b> | <b>(28,586)</b> | <b>303.0</b> | <b>71,020</b> | <b>0</b> | <b>303.0</b> | <b>73,328</b> | <b>0</b> | <b>303.0</b> | <b>75,712</b> | <b>0</b> | <b>303.0</b> | <b>78,174</b> | <b>0</b> | <b>303.0</b> |

PDA went through an organizational realignment in 2014, adapting to pursue efficiencies by bringing like services together. IPS business unit combines PDA's frontline employees, those that receive planning and development applications, with those that inspect development and building construction activity. IPS operates as a cost recovery business unit, within a model that allows scalability of services to effectively respond to trends including growth.

Operating expenditures for IPS consist primarily of the salary and wages costs for the staff that provide front line service. Indirect costs such as training, equipment, IT support, administrative support and outside services have been centralized in the City Wide Planning & Integration

business unit as part of the organizational realignment. This centralization enables efficient and equitable application of resources to planning and development products and services. Revenues earned from fees charged by Inspections & Permit Services are used to fund a portion of these supporting costs.

As the new organizational structure and its supporting processes stabilize; further analysis and review of staffing and operational budget requirements will be required. Changes to or redistribution of budgets between the planning and development related business units may be requested as a result.

## PDA: Inspection & Permit Services - Lines of Service

All \$ values are in Thousands (\$000)

| Building Regulations | 2014   |          |       | 2015   |          |       | 2016   |          |       | 2017   |          |       | 2018   |          |       |
|----------------------|--------|----------|-------|--------|----------|-------|--------|----------|-------|--------|----------|-------|--------|----------|-------|
|                      | \$ Exp | \$ Net   | FTEs  | \$ Exp | \$ Net   | FTEs  | \$ Exp | \$ Net   | FTEs  | \$ Exp | \$ Net   | FTEs  | \$ Exp | \$ Net   | FTEs  |
|                      | 28,012 | (40,710) | 177.0 | 58,102 | (12,645) | 177.0 | 60,067 | (12,979) | 177.0 | 62,072 | (13,349) | 177.0 | 64,500 | (13,373) | 177.0 |

Building Regulations is responsible for Inspections (Building Permits & Development Permits), Building Plans Examination, Codes, Safety Response, Construction Drawings, and Development Site Servicing Plans. Safety codes officers examine plans and perform inspections to make sure the design and construction conforms to the applicable safety codes and bylaws with respect to the structure itself as well as the interior services (e.g. plumbing, gas, heating, ventilation, air conditioning, and electrical). They coverage in urgent response situations were public also provide 24/7 safety is a concern. This service

ensures citizen safety in buildings both now and into the future.

For 2015-2018, service levels will be maintained through increased efficiencies and by using a risk-based approach to work priorities. Accommodating increased growth over the next four years will be addressed in a number of ways including: greater self serve options for customers, combining development and building inspection processes, incorporating technology advancements into the field operations, and implementing solutions based on customer feedback.

| Customer Advisory Services | 2014   |        |       | 2015   |        |       | 2016   |        |       | 2017   |        |       | 2018   |        |       |
|----------------------------|--------|--------|-------|--------|--------|-------|--------|--------|-------|--------|--------|-------|--------|--------|-------|
|                            | \$ Exp | \$ Net | FTEs  | \$ Exp | \$ Net | FTEs  | \$ Exp | \$ Net | FTEs  | \$ Exp | \$ Net | FTEs  | \$ Exp | \$ Net | FTEs  |
|                            | 12,298 | 12,034 | 124.0 | 12,591 | 12,319 | 124.0 | 12,932 | 12,650 | 124.0 | 13,308 | 13,016 | 124.0 | 13,342 | 13,041 | 124.0 |

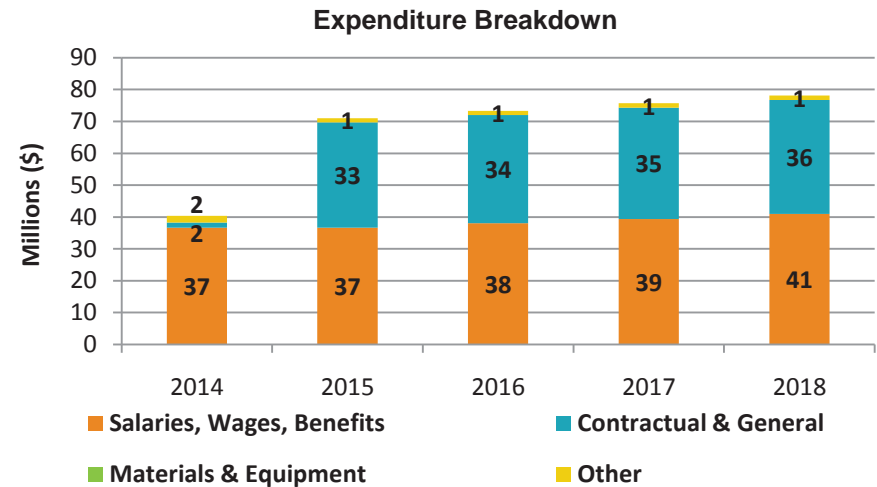
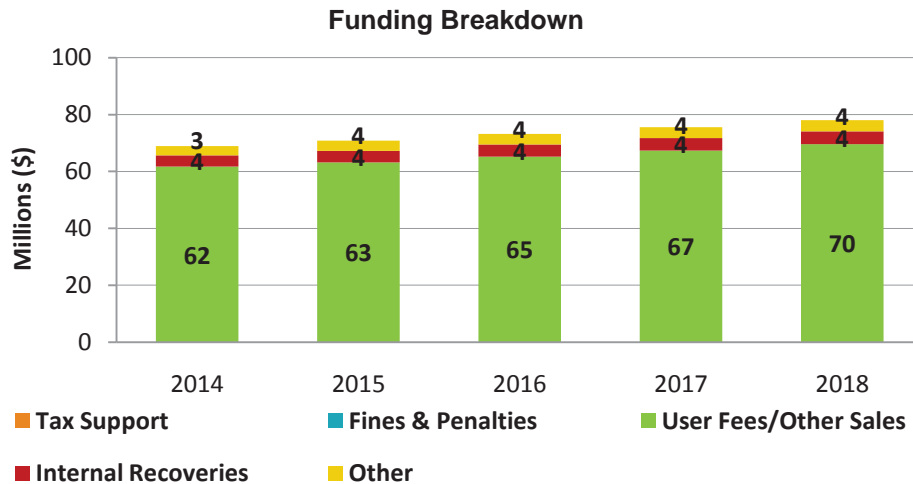
Customer Advisory Services provides information and application processing to planning and development customers online, through the call centre, and at the front counter. As the first point of contact for customers, CAS interacts with over 1,000 customers per day, and is the starting point for any planning and development application or inquiry. CAS ensures initial compliance of applications with applicable legislation and standards, and that businesses are safe, reputable and fit within the fabric of the city. In addition to intake, CAS processes a wide variety of applications in the planning and development product line varying from residential improvement projects, trade, building and development

permits, and business licences, the majority of which are issued in under two business days. It is also responsible for records management and ensures the integrity of customer data, and addressing.

CAS is strongly focused on providing a high-level of customer service, seeking to enhance the customer experience by constantly monitoring service delivery across all channels. CAS is continuously improving the quality of information available to customers: providing up-to-date application requirement lists, increasing the availability of online tools, and educating customers on the planning and development process.

## PDA: Inspection & Permit Services - Breakdown of the Operating Budget

Totals may not match due to rounding



**Funding Breakdown** - Inspections & Permit Services is a self-supporting business unit funded from fees charged for the services it provides.

**Expenditures** - 54 per cent of the expenses for this business are for direct salary and wages to provide inspections and permit services to customers.

Indirect planning and development support costs such as training & certification, safety equipment and furniture, facilities charges, IT support, corporate services, and external services have been centralized within the City Wide Policy & Integration business unit. The remaining 46 per cent of expenditures in IPS are for this administrative and technical support provided by CPI.

As the new departmental realignment and its supporting processes stabilize; further analysis and review of operating budget allocations between business units will be required and changes to this baseline may result.

**User Fees / Charges / Utility Rates** - There are no changes to 2015-2018 user fees at this time. Fees for 2015-2018 are detailed in Attachment 2.

Fee increases have been restricted to a minimum (3.3 per cent) in order to offset expected salary and wage increases and limited inflation only. Due to the PDA departmental realignment, a detailed review of individual fees is required but could not be completed in time for the 2015-2018 Action Plan implementation. Analysis of specific changes required to individual fees as a result of organizational or procedural changes will be brought forward as is practical as part of ongoing nextCITY initiatives.

**PDA: Inspection & Permit Services - Breakdown of the Net Operating Budget**

*Totals may not add due to rounding*

| <b>Breakdown of Net Operating Budget Changes (\$000s)</b> | <b>2015</b>   | <b>2016</b> | <b>2017</b> | <b>2018</b> |
|---|---------------|-------------|-------------|-------------|
| Previous Year's Budget                                    | (28,586)      | 0           | 0           | 0           |
| Less: Previous Year One Time                              | (310)         | 0           | 0           | 0           |
| Base  | (28,896)      | 0           | 0           | 0           |
| Efficiency Gains  | 0             | 0           | 0           | 0           |
| Inflation   | (351)         | 0           | 0           | 0           |
| Service and Budget Increase                               | 0             | 0           | 0           | 0           |
| Operating Impact of Previously Approved Capital           | 0             | 0           | 0           | 0           |
| Operating Impact of New Capital (Incremental)             | 0             | 0           | 0           | 0           |
| Re-alignments   | 29,247        | 0           | 0           | 0           |
| One Time  | 0             | 0           | 0           | 0           |
| <b>Total Budget Change</b>                                | <b>28,896</b> | <b>0</b>    | <b>0</b>    | <b>0</b>    |
| <b>Total Budget</b>                                       | <b>0</b>      | <b>0</b>    | <b>0</b>    | <b>0</b>    |

Operating budget changes are minimal, restricted primarily to service inflation and salary and wages adjustments.

Investments in the departmental realignment, as well as in technology and process improvements, are expected to enable IPS to absorb the impact of on-going city growth over the next four years. Because the

implementation of the departmental realignment occurred late in 2014, it is still too early to determine a value on what capacity to absorb work or what level of general efficiencies has been gained before entering into this next planning cycle. PDA expects to bring forward an update to Council describing the results and benefits from these efforts sometime in 2015.

| <b>TCA Depreciation (\$000s) - Inspection &amp; Permit Services</b> |             |             |             |
|---|-------------|-------------|-------------|
| <b>2015</b>   | <b>2016</b> | <b>2017</b> | <b>2018</b> |
| 0   | 0           | 0           | 0           |

*TCA Depreciation content is presented for information only.*

**PDA: Inspection & Permit Services - Operating Budget for Council Approval**

For Council Approval

| <b>Inspection &amp; Permit Services</b>  |                |                |  |             |              |          |             |              |          |             |              |          |             |              |          |
|--|----------------|----------------|--|-------------|--------------|----------|-------------|--------------|----------|-------------|--------------|----------|-------------|--------------|----------|
| <b>Total Operating Budget (\$000s) for Approval (Totals may not match due to rounding)</b> |                |                |  |             |              |          |             |              |          |             |              |          |             |              |          |
|  | 2012<br>Actual | 2013<br>Actual | 2014<br>Total<br>Budget<br>(as of<br>June<br>30) | 2015 Budget |              |          | 2016 Budget |              |          | 2017 Budget |              |          | 2018 Budget |              |          |
|  |                |                |  | Base        | One-<br>Time | Total    | Base        | One-<br>Time | Total    | Base        | One-<br>Time | Total    | Base        | One-<br>Time | Total    |
| Expenditures   | NA             | NA             | 40,400   | 71,020      | 0            | 71,020   | 73,328      | 0            | 73,328   | 75,712      | 0            | 75,712   | 78,174      | 0            | 78,174   |
| Recoveries   | NA             | NA             | (3,945)  | (4,093)     | 0            | (4,093)  | (4,222)     | 0            | (4,222)  | (4,355)     | 0            | (4,355)  | (4,491)     | 0            | (4,491)  |
| Revenue  | NA             | NA             | (65,042)   | (66,927)    | 0            | (66,927) | (69,106)    | 0            | (69,106) | (71,357)    | 0            | (71,357) | (73,683)    | 0            | (73,683) |
| Net  | NA             | NA             | (28,586)   | 0           | 0            | 0        | 0           | 0            | 0        | 0           | 0            | 0        | 0           | 0            | 0        |
| FTEs   | NA             | NA             | 303.0  | 303.0       | 0.0          | 303.0    | 303.0       | 0.0          | 303.0    | 303.0       | 0.0          | 303.0    | 303.0       | 0.0          | 303.0    |



# Local Area Planning & Implementation

**PDA: Local Area Planning Implementation - Overview**

Local Area Planning & Implementation (LPI) provides guidance in planning and development across Calgary. It is focused on achieving the corporate goals of the Municipal Development Plan (MDP) and Calgary Transportation Plan (CTP) through collaborative, outcome based policy development, application reviews and integrated decision making. LPI's work is customer-focused and prides itself on its interactions with its partners, stakeholders, and the people who call Calgary home. LPI plays an essential role in guiding development to aim high, grow smart and to make Calgary a place where people love to live, work and play.

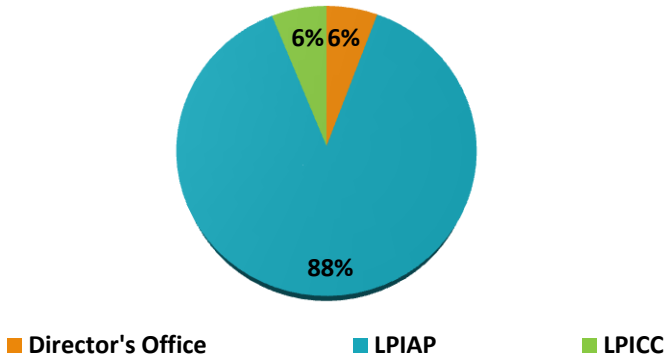
**Applications & Policy (LPIAP)**

LPI develops policies which enable growth patterns that meet the needs of the community including area structure plans, area redevelopment plans, development guidelines and other stand alone policies. LPI also leads the corporate review of planning applications (via the Corporate Planning Applications Group) such as land use amendments, outline plans, road closures, development permits and subdivision applications.

**Centre City (LPICC)**

LPI is the corporate lead for the inter-departmental implementation of the Centre City Plan. The centre city implementation team coordinates initiatives, facilitates collaboration, and builds strong partnerships with both internal business units and external stakeholders to achieve the vision of the Centre City Plan.

**Local Area Planning Implementation  
Gross Operating Expenditure by Line of Service  
(2015-2018)**



Values may not sum to 100%, due to rounding.

## PDA: Local Area Planning Implementation - Overview

### Trends

---

Calgary will continue to grow with citizens wanting to live, work, play and grow old in communities that offer a wide range of services and amenities. Outcomes of plans and planning applications will promote a city that is well-connected, comprised of walkable neighbourhoods with a mix of uses and a variety of housing types to meet all citizens' needs. Neighbourhood design, housing options and public engagement have to address the requirements of an aging and increasingly diverse community.

Population growth is expected to be significant over the next 50-60 years. Managing this growth will require planning for new greenfield communities and for the intensification of existing areas of the city. Today, 94 per cent of new growth is accommodated in new suburban areas.

Neighbourhoods of similar age across the city share similar demographic trends and development patterns. Area planning across community boundaries, while recognizing neighbourhood character, will efficiently address community life cycle changes and will help Calgary move towards the long term objectives identified in the MDP.

With the trend towards greater urban densities comes the need to consider new or improved services and infrastructure investment, while maintaining a financially viable City. Development incentives for the provision of public amenities and the alignment of City investments across departments will add to traditional funding sources.

As the city continues to thrive, workloads continue to increase. At the same time, the workforce is reaching retirement age and there is significant competition in attracting new employees. Strategies for employee retention and training will be critical for maintaining customer

satisfaction and levels of service.

### Long-Term Plans

---

Work in LPI is anchored by imagineCalgary, 2020 Sustainability Direction as well as MDP/CTP objectives and is strongly linked to efforts related to growth management and redevelopment strategies.

Growth management overlays in new Area Structure Plans ensure alignment with Council decisions on Funding & Financing Proposals by developers specifying how the infrastructure costs triggered by such development will be funded.

LPI is leading two priority projects, the Corridors Program and Centre City Implementation while working with other business units in support of other identified priorities. The Corridors Program will coordinate a comprehensive approach to development within Calgary's 24 main street corridors. The intention is to make desirable development easier and to support achievement of the outcomes described in the MDP and CTP, including a greater share of population growth in the established areas and a strong link to transit locations and services.

The Centre City Implementation strategy supports coordinated and concentrated investments in desirable downtown and inner city areas to implement the vision of the Centre City Plan. The strategy includes improvements to centre city open spaces, underpasses and key redevelopment corridors, as well as safety and cleanliness initiatives.

## PDA: Local Area Planning Implementation - Overview

### Citizen Engagement

---

A key theme arising from the Action Plan engagement sessions highlighted a need for more collaboration between City Departments and Business Units. Under the new Planning Structure, all members of the Corporate Planning Applications Group (Engineering, Parks, Planning and Transportation) have been co-located into the same work area. Over 2015-18, this approach is intended to increase opportunities for daily collaboration within the different Departments, provide clear and unified direction and increase overall efficiency and effectiveness in the review of planning applications.

The new Planning System, that will continue to be built upon in the 2015-2018 business cycle, encourages effectiveness in the evaluation of proposed plans and /or applications. This will be done through early review and design discussions to examine and consider the best opportunities for a proposed policy document or application. This approach allows for more constructive dialogue and decision making between staff, applicants, and the community and a more in-depth and shared understanding of the project intent. Proactive community engagement is incorporated into individual projects or applications based on the scope of the work being reviewed.

Another theme arising from the Action Plan engagement was that Citizens of Calgary have expressed their desire to have greater access to local amenities and transit with improved pedestrian networks. All plans for new and redeveloped areas, including the Corridors Program, are in support of these objectives.

Inclusive and representative engagement is essential in the development of any local area plan. In 2009, Administration facilitated the first Centre City Citizen Perception Survey to establish benchmarks against which future actions and initiatives could be measured. Opinions and perceptions were captured in 2011 and 2013 and the story continues to be one of success. This engagement will continue, providing value insight into future actions and activities.

Community and stakeholder engagement is central to the work that is done is LPI. The tools and methods used to gather and analyze feedback are always changing. New approaches for reaching out to the citizens of Calgary will be supported and will help improve overall public participation in the planning process. The Corridors Program, for example, employs a Neighbourhood Charter as a tool for community members to pinpoint the issues, opportunities and outcomes they would like to see for main streets in their area.

### Council Priorities

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Local Area Planning & Implementation plays a significant role in A prosperous city and A city of inspiring neighbourhoods. Applications & Policy implements the MDP through the creation of a more compact city that supports transit use and mixed use activity, and by connecting the city with transportation and transit choices and complete streets. The City's investments in the Centre City since 2007 have created a more attractive core, resulting in greater capacity to support and encourage future investment and growth. Sustaining this momentum and investment is critical to achieving and maintaining the vision of the Centre City as a liveable, thriving, and caring place.

**PDA: Local Area Planning Implementation - Actions for Council Approval**

For Council Approval

**Planning, Development & Assessment Commitment:**

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A prosperous city  
Calgary continues to grow as a magnet for talent, a place where  
there is opportunity for all, and the best place in Canada  
to start and grow a business.

| Strategy Related to Council Outcome  | Business Unit Action Related to Strategy  | Accountable Service |
|--|---|---------------------|
| P1 Strengthen Calgary’s position as a global energy centre and location of choice for international talent, investment and innovation through enhanced business development, marketing and place-making initiatives. | P1.1 Increase PDA participation in industry groups  | LPIAP, LPICC        |
|  | P1.2 Build partnerships with the private sector to leverage investments in public amenities   | LPIAP, LPICC        |
| P3 Support civic, business and community partners, as well as business revitalization zones, to collaborate and attract local and global investment.   | P3.1 Continue to research and develop opportunities for planning and development innovation   | LPIAP, LPICC        |
|  | P3.2 Build a reputation for being knowledgeable in our field of expertise and helpful in achieving deadlines                                | LPIAP, LPICC        |
| P4 Cut red tape and continue to foster a competitive tax environment to help small business succeed.   | P4.1 Improve transparency and understanding of the planning system by standardizing and optimizing internal business practices and policies | LPIAP, LPICC        |



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For Council Approval

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PDA is committed to being an effective business partner to citizens, business, and partners. PDA will make it easier to do business with The City by facilitating understanding and predictability of planning and building processes and outcomes.

P4 Cut red tape and continue to foster a competitive tax environment to help small business succeed.

P4.2 Improve citizen/business outreach by making information more useful/useable and available in more languages

LPIAP, LPICC

P6 Increase affordable and accessible housing options.

P6.1 Support corporate direction and implementation actions related to secondary suites

LPIAP, LPICC

P6.2 Monitor related land supply initiatives and provide policy support

LPIAP, LPICC

P10 Expand our library system and enhance access to technology and information.

P10.1 Improve public access to PDA stewarded information

LPIAP, LPICC

P10.2 Improve PDA information management practices

LPIAP, LPICC



**PDA: Local Area Planning Implementation - Actions for Council Approval**

For Council Approval

**Planning, Development & Assessment Commitment:**  
 PDA works with all stakeholders to create complete communities, encouraging diversity in amenities, housing types, activities and services to create places where all citizens can make choices about their quality of life.

A city of inspiring neighbourhoods  
 Every Calgarian lives in a safe, mixed and just neighbourhood,  
 and has the opportunity to participate in civic life.

| Strategy Related to Council Outcome  | Business Unit Action Related to Strategy   | Accountable Service |
|--|--|---------------------|
| N3 Enhance The City's capacity and resiliency to prepare for and respond to pandemics, natural disasters and emergency situations. | N3.1 Further develop and implement a business continuity plan and risk management strategy   | LPIAP, LPICC        |
| N5 Systematically invest in established neighbourhoods as they evolve to accommodate changing community needs.                     | N5.1 Implement coordinated redevelopment strategies that promote increased population and employment in activity centres and along urban and neighbourhood corridors identified in the MDP | LPIAP, LPICC        |
|  | N5.2 Identify and support investments in capital infrastructure that supports the evolution and growth of inner city and established communities   | LPIAP, LPICC        |
| N7 Develop a new funding framework to provide for infrastructure in new and redeveloping neighbourhoods.                           | N7.1 Investigate and promote new and innovative financing techniques and partnerships to provide infrastructure in new and redeveloping neighbourhoods                                     | LPIAP, LPICC        |



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PDA works with all stakeholders to create complete communities, encouraging diversity in amenities, housing types, activities and services to create places where all citizens can make choices about their quality of life.

N7 Develop a new funding framework to provide for infrastructure in new and redeveloping neighbourhoods.

N7.2 Optimize and leverage existing funding resources to support City development objectives

LPIAP, LPICC

N8 Make it easier to build developments that meet our Municipal Development Plan and Calgary Transportation Plan objectives.

N8.1 In collaboration with stakeholders, address issues and opportunities related to achieving MDP/CTP objectives

LPIAP, LPICC

N8.2 Review and optimize roles and responsibilities for MDP/CTP implementation

LPIAP, LPICC





**PDA: Local Area Planning Implementation - Actions for Council Approval**

For Council Approval

**Planning, Development & Assessment Commitment:**

PDA will leverage land use and building processes to support healthy, environmentally and fiscal sustainable places.

A healthy and green city  
We steward our air, land, and water while encouraging healthy lifestyles for all Calgarians.

| Strategy Related to Council Outcome   | Business Unit Action Related to Strategy   | Accountable Service |
|---|--|---------------------|
| H6 Continue to build public awareness and understanding of our shared responsibility to conserve and protect the environment. | H6.1 Promote sustainable built environments  | LPIAP, LPICC        |
|   | H6.2 Provide opportunities for conservation and tree preservation through the design and approvals process | LPIAP               |



**PDA: Local Area Planning Implementation - Actions for Council Approval**

For Council Approval

**Planning, Development & Assessment Commitment:**  
 PDA is pro-active and strategic in mitigating risks and finding opportunities for improvement. PDA will be involved in the community and build relationships with customers to provide services they have confidence in.

A well-run city  
 Calgary's government is open, responsive, accountable and transparent, delivering excellent services at a fair price. We work with our government partners to ensure we have the tools we need.

| Strategy Related to Council Outcome  | Business Unit Action Related to Strategy   | Accountable Service |
|--|--|---------------------|
| W3 Examine opportunities for alternative service delivery for competitiveness.   | W3.1 Participate in a zero-based review in order to realize improvements in service efficiency and effectiveness   | LPIAP, LPICC        |
| W5 Regularly collaborate and engage citizens to encourage participation in City decision-making, and better communicate the reasons for the decisions. | W5.1 Continue to develop stakeholder relationships to achieve positive outcomes  | LPIAP, LPICC        |
| W7 Continue to transform the organization to be more citizen-focused in its approach and delivery of service.  | W7.1 Integrate customer service commitments and standards into Department and Business Unit programs and services to drive program and service improvements                | LPIAP, LPICC        |
|  | W7.2 Set clear expectations for staff and reinforce those through learning and development and recognition programs to empower staff to deliver excellent customer service | LPIAP, LPICC        |



**PDA: Local Area Planning Implementation - Actions for Council Approval**

For Council Approval

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**Planning, Development & Assessment Commitment:**  
 PDA is pro-active and strategic in mitigating risks and finding opportunities for improvement. PDA will be involved in the community and build relationships with customers to provide services they have confidence in.

W7 Continue to transform the organization to be more citizen-focused in its approach and delivery of service.

W7.3 Establish service standards, metrics and targets incorporating customer feedback to provide responsive and quality service

LPIAP, LPICC

W7.4 Use customer metrics to drive service improvements, process efficiencies and value for money

LPIAP, LPICC

W9 Strive to be an employer of choice with a focus on addressing The City's aging workforce.

W9.1 Build an inclusive work place that is reflective of the greater community

LPIAP, LPICC

W9.2 Develop a PDA strategic work force plan that responds to and forecasts workforce trends

LPIAP, LPICC

W9.3 Develop and implement strategic work force learning and development plans that foster a high performing culture

LPIAP, LPICC

W10 Support the Corporate Safety Strategy

W10.1 Foster a risk-based health and safety focused culture

LPIAP, LPICC

W10.2 Improve reporting and follow up procedures for specific leading safety indicators, near misses, and hazardous conditions

LPIAP, LPICC



**PDA: Local Area Planning Implementation - Lines of Service**

| <b>Breakdown of Operating Budget by Service (\$000) (Totals may not add due to rounding)</b> |        |        |      |        |        |      |        |        |      |        |        |      |        |        |      |
|--|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|
|  | 2014   |        |      | 2015   |        |      | 2016   |        |      | 2017   |        |      | 2018   |        |      |
|  | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs |
| Director's Office  | 735    | 735    | 3.0  | 1,311  | 1,311  | 3.0  | 606    | 606    | 3.0  | 615    | 615    | 3.0  | 615    | 615    | 3.0  |
| Applications & Policy  | 11,577 | 9,929  | 74.0 | 11,896 | 10,248 | 74.0 | 12,100 | 10,452 | 74.0 | 12,464 | 10,816 | 75.0 | 12,464 | 10,816 | 75.0 |
| Centre City  | 847    | 847    | 3.0  | 847    | 847    | 3.0  | 847    | 847    | 3.0  | 847    | 847    | 3.0  | 847    | 847    | 3.0  |
| Total Business Unit  | 13,159 | 11,511 | 80.0 | 14,054 | 12,406 | 80.0 | 13,553 | 11,905 | 80.0 | 13,926 | 12,278 | 81.0 | 13,926 | 12,278 | 81.0 |

Operating expenditures for Local Area Planning & Implementation consist primarily of the salary and wages costs for the staff that provide front line service.

Indirect costs such as training, equipment, IT support, administrative support and outside services have been centralized in the City Wide Planning & Integration business unit as part of the new matrix management organizational structure. This centralization enables efficient and equitable application of administrative resources to Planning & Development products and services.

PDA was allocated limited increases to its overall operating allocation.

Consequently, year over year changes to LPI's operating budget are minimal, restricted to general salary and wage increases for tax supported staff as well as salary and wages for 1 additional FTE in 2017. This proposed increase of 1 FTE is intended to help address increased demand for community planning services, public engagement, and inquiries resulting from significant population growth and development.

As the new organizational structure and its supporting processes stabilize; further analysis and review of staffing and operational budget requirements will be required. Changes to or redistribution of budgets between the planning and development related business units may be requested as a result.

**PDA: Local Area Planning Implementation - Lines of Service**

*All \$ values are in Thousands (\$000)*

| Centre City | 2014   |        |      | 2015   |        |      | 2016   |        |      | 2017   |        |      | 2018   |        |      |
|-------------|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|
|             | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs |
|             | 847    | 847    | 3.0  | 847    | 847    | 3.0  | 847    | 847    | 3.0  | 847    | 847    | 3.0  | 847    | 847    | 3.0  |

Centre City Planning and Implementation is responsible for policy development, development application processing, and aligning operating and capital projects, all of which add to the vibrancy and strength of the Centre City. The operating budget contained in LPI supports the

corporate lead team only. The overall Centre City Implementation Team is comprised of many contributing Business Units. These contributing members are reported within their respective Business Units.

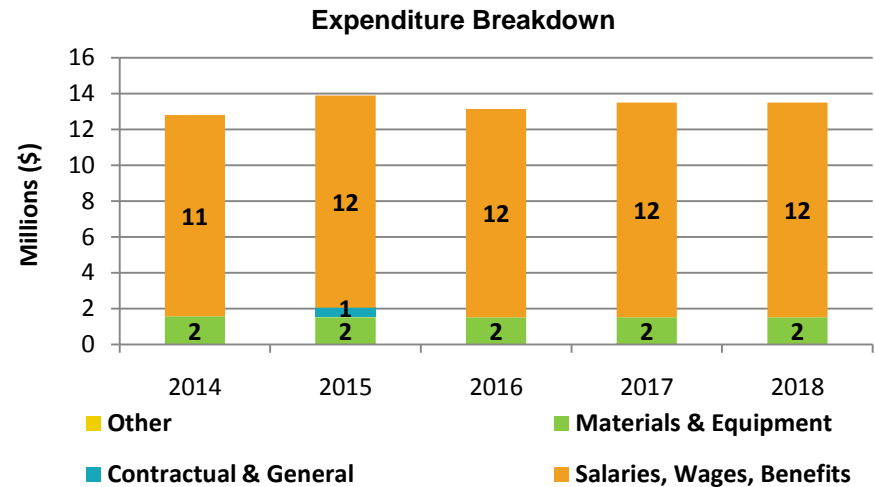
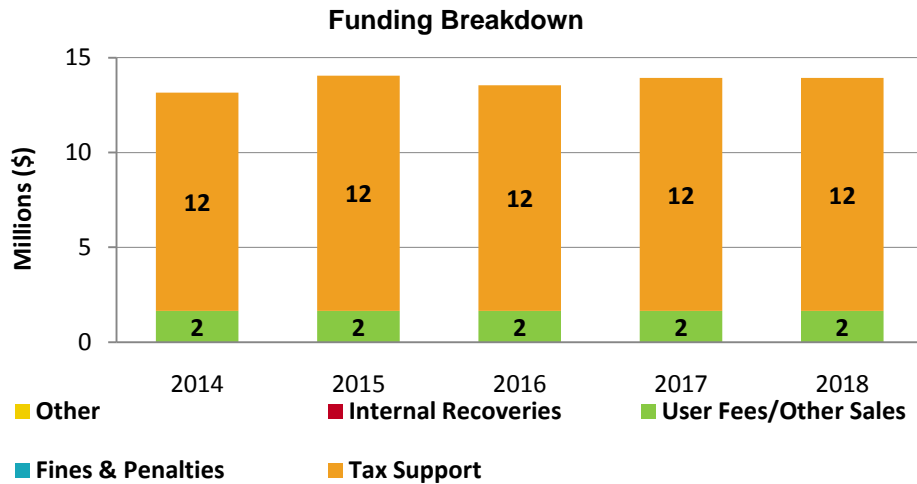
| Applications & Policy | 2014   |        |      | 2015   |        |      | 2016   |        |      | 2017   |        |      | 2018   |        |      |
|-----------------------|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|--------|--------|------|
|                       | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs | \$ Exp | \$ Net | FTEs |
|                       | 11,577 | 9,929  | 74.0 | 11,896 | 10,248 | 74.0 | 12,100 | 10,452 | 74.0 | 12,464 | 10,816 | 75.0 | 12,464 | 10,816 | 75.0 |

Application and policy teams are managed by geographical location: North, South, and West. Teams support the full lifecycle of development for communities within their assigned boundaries. This can include planning for change in existing communities, translating Council's policies into appropriate development, land use, and design within new

communities as well as promoting a mix of land uses and a more walk-able urban form in all communities. This structure provides more consistency for developers and increased opportunities for development for staff.

**PDA: Local Area Planning Implementation - Breakdown of the Operating Budget**

*Totals may not match due to rounding*



**Funding Breakdown** - Local Area Planning & Implementation is primarily a tax supported business unit. This funding model, as applied to broad based planning policy development, aligns with the User Fees and Subsidies Policy because benefits of this work are realized by the broader community rather than a single development.

**Expenditures** - Expenses are primarily for salary and wages for LPI staff that manage the planning and applications processes.

Indirect planning and development support costs such as training & certification, safety equipment and furniture, facilities charges, IT support, corporate services, and external services have been centralized within the City Wide Policy & Integration business unit. As the new organizational structure and its supporting processes stabilize; further analysis and review of operating budget allocations between business

units will be required and changes to this baseline may result.

**User Fees / Charges / Utility Rates** - Recent funding policy trends are shifting, items that were once thought to benefit only the larger community have been considered appropriate for funding from fees. The appetite to move away from this funding model may be expressing itself through the introduction of developer funded Area Structure Plans.

A complete funding review, building on changes introduced via transforming planning initiatives and the organizational realignment, could not be completed in time for Action Plan implementation. Analysis of specific changes required to individual fees as a result of organizational or procedural changes will be brought forward as is practical as part of ongoing nextCITY initiatives.

**PDA: Local Area Planning Implementation - Breakdown of the Net Operating Budget**

*Totals may not add due to rounding*

| <b>Breakdown of Net Operating Budget Changes (\$000s)</b> | <b>2015</b>   | <b>2016</b>   | <b>2017</b>   | <b>2018</b>   |
|---|---------------|---------------|---------------|---------------|
| Previous Year's Budget                                    | 11,511        | 12,406        | 11,905        | 12,278        |
| Less: Previous Year One Time                              | 0             | (713)         | 0             | 0             |
| Base  | 11,511        | 11,693        | 11,905        | 12,278        |
| Efficiency Gains  | 0             | 0             | 0             | 0             |
| Inflation   | 182           | 212           | 240           | 0             |
| Service and Budget Increase                               | 0             | 0             | 133           | 0             |
| Operating Impact of Previously Approved Capital           | 0             | 0             | 0             | 0             |
| Operating Impact of New Capital (Incremental)             | 0             | 0             | 0             | 0             |
| Re-alignments   | (0)           | 0             | 0             | 0             |
| One Time  | 713           | 0             | 0             | 0             |
| <b>Total Budget Change</b>                                | <b>895</b>    | <b>212</b>    | <b>373</b>    | <b>0</b>      |
| <b>Total Budget</b>                                       | <b>12,406</b> | <b>11,905</b> | <b>12,278</b> | <b>12,278</b> |

Investments in the departmental realignment, as well as in technology and process improvements, are expected to enable LPI to absorb the impact of on-going city growth over the next four years. Because the implementation of the departmental realignment occurred late in 2014, it is still too early to determine a value on what capacity to absorb work or what level of general efficiencies has been gained before entering into this next planning cycle. PDA expects to bring forward an update to

Council describing the results and benefits from these efforts sometime in 2015.

Capital budget investments in downtown improvements planned for 2015-18 will not have an impact on the operating budget.

| <b>TCA Depreciation (\$000s) - Local Area Planning Implementation</b> |             |             |             |
|---|-------------|-------------|-------------|
| <b>2015</b>   | <b>2016</b> | <b>2017</b> | <b>2018</b> |
| 0   | 0           | 0           | 0           |

*TCA Depreciation content is presented for information only.*

**PDA: Local Area Planning Implementation - Operating Budget for Council Approval**

For Council Approval

| <b>Local Area Planning Implementation</b>  |                |                |  |             |              |         |             |              |         |             |              |         |             |              |         |
|--|----------------|----------------|--|-------------|--------------|---------|-------------|--------------|---------|-------------|--------------|---------|-------------|--------------|---------|
| <b>Total Operating Budget (\$000s) for Approval (Totals may not match due to rounding)</b> |                |                |  |             |              |         |             |              |         |             |              |         |             |              |         |
|  | 2012<br>Actual | 2013<br>Actual | 2014<br>Total<br>Budget<br>(as of<br>June<br>30) | 2015 Budget |              |         | 2016 Budget |              |         | 2017 Budget |              |         | 2018 Budget |              |         |
|  |                |                |  | Base        | One-<br>Time | Total   | Base        | One-<br>Time | Total   | Base        | One-<br>Time | Total   | Base        | One-<br>Time | Total   |
| Expenditures   | NA             | NA             | 13,159   | 13,341      | 713          | 14,054  | 13,553      | 0            | 13,553  | 13,926      | 0            | 13,926  | 13,926      | 0            | 13,926  |
| Recoveries   | NA             | NA             | 0  | 0           | 0            | 0       | 0           | 0            | 0       | 0           | 0            | 0       | 0           | 0            | 0       |
| Revenue  | NA             | NA             | (1,648)  | (1,648)     | 0            | (1,648) | (1,648)     | 0            | (1,648) | (1,648)     | 0            | (1,648) | (1,648)     | 0            | (1,648) |
| Net  | NA             | NA             | 11,511   | 11,693      | 713          | 12,406  | 11,905      | 0            | 11,905  | 12,278      | 0            | 12,278  | 12,278      | 0            | 12,278  |
| FTEs   | NA             | NA             | 80.0   | 80.0        | 0.0          | 80.0    | 80.0        | 0.0          | 80.0    | 81.0        | 0.0          | 81.0    | 81.0        | 0.0          | 81.0    |

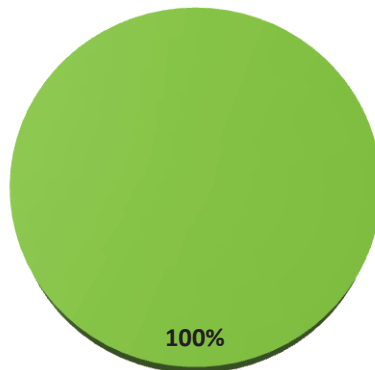


## PDA: Local Area Planning Implementation - Capital Budget Overview

| Local Area Planning Implementation                                      |      |      |      |      |        |       |
|---|------|------|------|------|--------|-------|
| Capital Budget (\$000s) Overview (Totals may not match due to rounding) |      |      |      |      |        |       |
|   | 2015 | 2016 | 2017 | 2018 | *2019+ | Total |
| Previously-Approved Budget (as at 2014 June 30)                         | 0    | 0    | 0    | 0    | 0      | 0     |
| Total New Capital Budget Requests                                       | 300  | 300  | 300  | 300  | 0      | 1,200 |
| Total Business Unit Capital Budget                                      | 300  | 300  | 300  | 300  | 0      | 1,200 |

\*2019+ represents projects which start within the 2015-2018 cycle and which are completed in years beyond 2018.

### Local Area Planning Implementation New Capital Budget Requests by Project Type (2015-\*2019+) Total \$1 Million



■ Maintenance

**Maintenance/Replacement** - The capital budget request will support annual capital funding for the Downtown Improvement (DOIT) Program of improvements in the public realm within the Downtown area. This funding is to be drawn from the Downtown Improvement Reserve (non-tax supported source). DOIT is an annual program that undertakes selective improvements in the public realm. Recent improvements include the Center City Banner Program, Centre Street Bridge Illumination and Centre City Wayfinding Program. 2015-2018 funding will contribute towards the continuation of the Banner Program, CPR underpass improvements, as well as other smaller scale projects yet to be determined.

This program will enhance the public realm, encourage citizens and visitors to use the Downtown's many amenities, and improve the public perception of downtown Calgary. In addition the fund plays a significant role in the implementation of the Centre City Plan by providing quick wins and noticeable differences in the pedestrian environment thereby providing synergies for other projects.

## PDA: Local Area Planning Implementation - Capital Budget Overview

| Funding for Capital Projects (Totals may not match due to rounding) | 2015       | 2016       | 2017       | 2018       | *2019+   | Total 2015-*2019+ |
|---|------------|------------|------------|------------|----------|-------------------|
| Capital Reserves  | 300        | 300        | 300        | 300        | 0        | 1,200             |
| <b>Total Funding</b>  | <b>300</b> | <b>300</b> | <b>300</b> | <b>300</b> | <b>0</b> | <b>1,200</b>      |

\*2019+ represents projects which start within the 2015-2018 cycle and are completed in years beyond 2018.

### Capital Budget Listing (by Program - Project) (\$000s)

| Program-<br>Project                              | Project Description   | Type | Cat | Prev.<br>Approved<br>Budget up<br>to 2014 | Prev.<br>Approved<br>Budget<br>for future<br>years | New<br>Budget<br>Request | 2015 | 2016 | 2017 | 2018 | *2019+ | 2015-<br>*2019+ | Growth<br>Area |
|--|-----------------------|------|-----|---|--|--------------------------|------|------|------|------|--------|-----------------|----------------|
| 152-002  | Downtown Improvements | M    | C   |   |  | 1,200                    | 300  | 300  | 300  | 300  |        | 1,200           |                |
| <b>Total Program 152 : Downtown Improvements</b> |                       |      |     | -   | -  | 1,200                    | 300  | 300  | 300  | 300  | -      | 1,200           |                |
|  |                       |      |     | -   | -  | 1,200                    | 300  | 300  | 300  | 300  | -      | 1,200           |                |

Note:

Type: M=Maintenance/Replacement, U=Upgrade, G=Growth, S=Service Change

Category: A=Project in Progress, C=New Project, O1=2015-2018 Operating Cost, O2=2019 and beyond Operating Cost

### Explanation of Budget Requests

#### Program 152 : Downtown Improvements

##### Project 152-002 Downtown Improvements

**New budget request** for \$1.2million. The Downtown Improvement Fund (DOIT Fund) is a Council approved program for smaller-scale public improvements in the downtown area. The Centre City Plan provides guidance for these enhancements. The annual maximum the reserve may fund is \$300K plus any accrued carry-forward spending from previous years.

**Operating Impact of Capital:** None.

**PDA: Local Area Planning Implementation - Capital Budget for Council Approval**

|                      |
|----------------------|
| For Council Approval |
|----------------------|

| Local Area Planning Implementation  |      |            |            |            |            |          |                        |
|---|------|------------|------------|------------|------------|----------|------------------------|
| Capital Budget (\$000s) for Approval (Totals may not match due to rounding) |      |            |            |            |            |          |                        |
|   | 2014 | 2015       | 2016       | 2017       | 2018       | *2019+   | Total<br>(2015-*2019+) |
| Previously-Approved Budget (as at 2014 June 30)                             | 481  | 0          | 0          | 0          | 0          | 0        | 0                      |
| Projects Requiring Approval   |      |            |            |            |            |          |                        |
| <i>Program 152 : Downtown Improvements</i>                                  |      | 300        | 300        | 300        | 300        | 0        | 1,200                  |
| <b>Total Projects Requiring Approval</b>                                    |      | <b>300</b> | <b>300</b> | <b>300</b> | <b>300</b> | <b>0</b> | <b>1,200</b>           |
| Total Capital Budget  | 481  | 300        | 300        | 300        | 300        | 0        | 1,200                  |

\*2019+ represents projects which start within the 2015-2018 cycle and are completed in years beyond 2018.

**Planning, Development & Assessment: General Manager - Operating Budget for Council Approval**

For Council Approval

| <b>Planning, Development &amp; Assessment: General Manager</b>                 |                |                |  |             |              |       |             |              |       |             |              |       |             |              |       |
|--|----------------|----------------|--|-------------|--------------|-------|-------------|--------------|-------|-------------|--------------|-------|-------------|--------------|-------|
| <b>Total GM Operating Budget (\$000s) (Totals may not add due to rounding)</b> |                |                |  |             |              |       |             |              |       |             |              |       |             |              |       |
|  | 2012<br>Actual | 2013<br>Actual | 2014<br>Total<br>Budget<br>(as of<br>June<br>30) | 2015 Budget |              |       | 2016 Budget |              |       | 2017 Budget |              |       | 2018 Budget |              |       |
|  |                |                |  | Base        | One-<br>Time | Total | Base        | One-<br>Time | Total | Base        | One-<br>Time | Total | Base        | One-<br>Time | Total |
| Expenditures   | NA             | NA             | 945  | 945         | 0            | 945   | 945         | 0            | 945   | 945         | 0            | 945   | 945         | 0            | 945   |
| Recoveries   | NA             | NA             | (69)   | (69)        | 0            | (69)  | (69)        | 0            | (69)  | (69)        | 0            | (69)  | (69)        | 0            | (69)  |
| Revenue  | NA             | NA             | 0  | 0           | 0            | 0     | 0           | 0            | 0     | 0           | 0            | 0     | 0           | 0            | 0     |
| Net  | NA             | NA             | 875  | 875         | 0            | 875   | 875         | 0            | 875   | 875         | 0            | 875   | 875         | 0            | 875   |
| FTEs   | NA             | NA             | 4.0  | 4.0         | 0.0          | 4.0   | 4.0         | 0.0          | 4.0   | 4.0         | 0.0          | 4.0   | 4.0         | 0.0          | 4.0   |