



Developing Suburban Communities Supply Monitoring:

Monthly reporting will be adjusted (trued up) with each SRG annual inventory report. Takes March inventory adds in new supply and subtracts out absorption

September 2021 Estimated Serviced Inventory Subdivided Lots and Unsubdivided with Approved Land Use / Outline Plan (includes vacant registered lots and approved Tentative Plans of Subdivision)

September 2021 Estimated YTD Inventory of Pending Subdivisions (includes serviced, partially serviced, and un-serviced subdivisions)

Sector & Community

2021 Estimated September Inventory

Units available for Housing

Lands available to be Subdivided

Table with columns: NORTH, Subdivided Land & Units (A), Unsubdivided Land & Units (B), Total Supply (A+B), Share of. Rows include Nolan Hill, Sage Hill, Kinross, etc.

Table with columns: Pending Subdivisions, Ha, SF/Semi, Multi, Total, # of applications, % SF/Semi. Rows include Nolan Hill, Sage Hill, Kinross, etc.

Table with columns: NORTHEAST, Subdivided Land & Units (A), Unsubdivided Land & Units (B), Total Supply (A+B), Share of. Rows include Cityscape, Saddle Ridge, Skyview Ranch, etc.

Table with columns: Pending Subdivisions, Ha, SF/Semi, Multi, Total, # of applications, % SF/Semi. Rows include Cityscape, Saddle Ridge, Skyview Ranch, etc.

Table with columns: EAST, Subdivided Land & Units (A), Unsubdivided Land & Units (B), Total Supply (A+B), Share of. Rows include Belvedere, Twin Hills.

Table with columns: Pending Subdivisions, Ha, SF/Semi, Multi, Total, # of applications, % SF/Semi. Rows include Belvedere, Twin Hills.

Table with columns: SOUTHEAST, Subdivided Land & Units (A), Unsubdivided Land & Units (B), Total Supply (A+B), Share of. Rows include Copperfield, Cranston, Mahogany, etc.

Table with columns: Pending Subdivisions, Ha, SF/Semi, Multi, Total, # of applications, % SF/Semi. Rows include Copperfield, Cranston, Mahogany, etc.

Table with columns: SOUTH, Subdivided Land & Units (A), Unsubdivided Land & Units (B), Total Supply (A+B), Share of. Rows include Walden, Legacy, Silverado, Belmont, etc.

Table with columns: Pending Subdivisions, Ha, SF/Semi, Multi, Total, # of applications, % SF/Semi. Rows include Walden, Legacy, Silverado, Belmont, etc.

Table with columns: WEST, Subdivided Land & Units (A), Unsubdivided Land & Units (B), Total Supply (A+B), Share of. Rows include Aspen Woods, Crestmont, West Springs, etc.

Table with columns: Pending Subdivisions, Ha, SF/Semi, Multi, Total, # of applications, % SF/Semi. Rows include Aspen Woods, Crestmont, West Springs, etc.

Table with columns: NORTHWEST, Subdivided Land & Units (A), Unsubdivided Land & Units (B), Total Supply (A+B), Share of. Rows include Haskayne.

Table with columns: Pending Subdivisions, Ha, SF/Semi, Multi, Total, # of applications, % SF/Semi. Rows include Haskayne.

Table with columns: CITY TOTAL, Subdivided Land & Units (A), Unsubdivided Land & Units (B), Total Supply (A+B), Share of.

Table with columns: Pending Subdivisions, Ha, SF/Semi, Multi, Total, # of applications, % SF/Semi.

Table with columns: CITY TOTAL, Subdivided Land & Units (A), Unsubdivided Land & Units (B), Total Supply (A+B), Share of. Rows include Portion of City, NORTH 1/2 OF CITY, SOUTH 1/2 OF CITY.

Table with columns: Pending Subdivisions, Ha, SF/Semi, Multi, Total, # of applications, % SF/Semi. Rows include Portion of City, NORTH 1/2 OF CITY, SOUTH 1/2 OF CITY.

Source: City of Calgary: Planning and Development - Growth Strategies - Geodemographics

North half of Calgary = North, Northeast, East, Northwest Sectors; South half of Calgary = Southeast, South and West Sectors

Note on SERVICED LAND: The CTY defines capacity for a serviced lot as EITHER...

Lot that has Outline plan (land use) and all five services (water, storm, sanitary, fire and transportation).

Translation: A lot which is "available for tentative plans of subdivision"... Which can include...

Lot that is approved and available for a Building Permit (BP). Translation: A lot that has all services,

is subdivided and has all the approvals. This also includes those lots that have "pipes sticking out of the ground".

Process to determine Current Month's supply:

Subdivided: Takes previous months supply. Adds in the approvals for the month to get additional supply added. Then subtracts out estimated absorption using

Building Permits from the Subdivided supply. This then equals the current estimated subdivided supply.

Unsubdivided: Takes the previous months unsubdivided supply. Then adds in any approvals in outline plan/landuse (unsubdivided). Then takes out the months

additional subdivided supply from this total. This then equals the current estimated unsubdivided supply.

Pending Subdivisions:

These are the year-to-date subdivision applications that were accepted by the City and waiting

for a decision. These may be fully serviced (no further City infrastructure is required), partially

serviced (some services in place), or no services in place at all. Reported applications in this

report does not guarantee approval of the applications. Subdivision authority may approve or

refuse these applications based on their planning merits.

What is the City Serviced Definition?

The definition of “serviced land” has been expanded. Previously, “serviced” has been defined as having City water, storm, and sanitary infrastructure in place **providing capacity** for development for industry.

Now “serviced” represents those Five leading infrastructure services of **Water, Storm, Sanitary, Transportation and Fire having infrastructure capacity in place** by either the developer or The City. **These are areas where the services are either installed by The City or provided by the developer without further City expenditures.**

These lands are **comprised of two types of measures** those that have local on-site services in place and those that do not have local on-site services in place but do have capacity within City infrastructure to accommodate their development.

The CITY defines capacity for a serviced lot as EITHER...

(A) A lot that has Outline plan (land use) and all five services (water, storm, sanitary, fire and transportation). Translation: A lot which is ‘available for tentative plans of subdivision.’

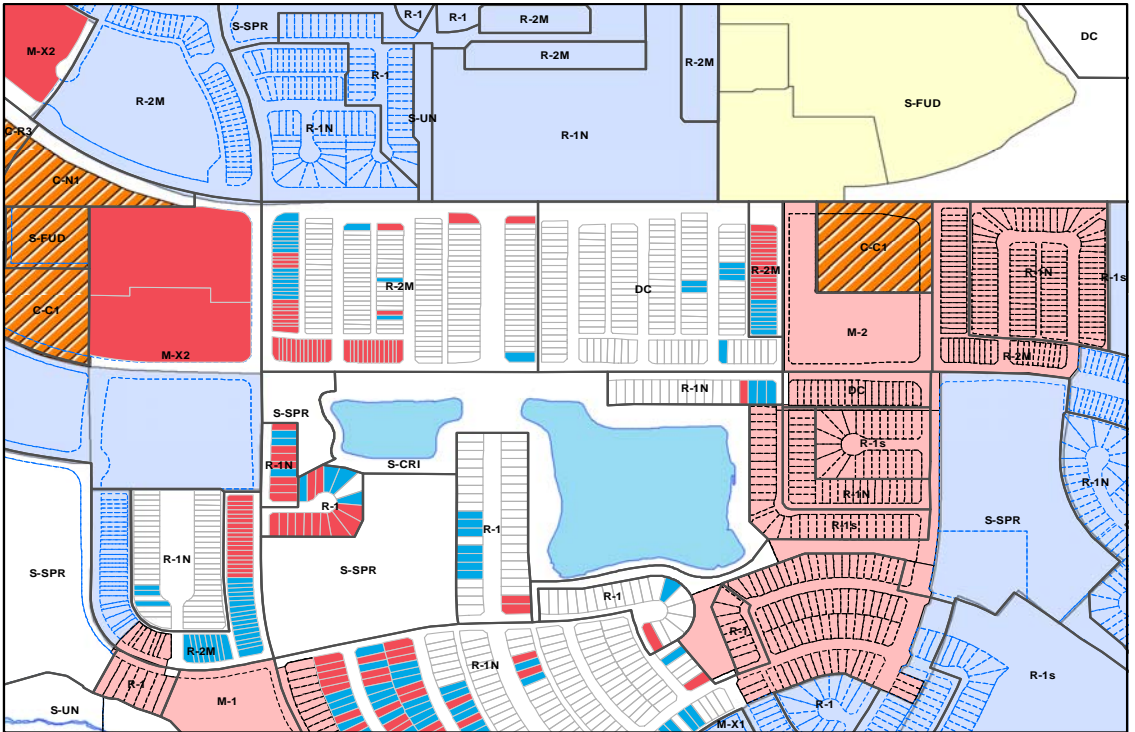
.... Which Can Include....

(B) A lot that is approved and available for a Building Permit (BP). Translation: **A lot that has all services, is subdivided** and has all the approvals. This also includes those lots that have “pipes sticking out of the ground”.

The INDUSTRY (builders) defines a serviced lot as ..

(C) A lot with all approvals and services and ready for construction. Translation: A lot ready for a BP that has pipes ‘sticking out of the ground’. - *In Calgary, shallow utilities are not a requirement for a BP and sometimes builders will accept a lot with the expectation of shallows being forthcoming, but for the most part the definition of a serviced lot from a builder’s point of view means they have the necessary services to construct.*

Sample screenshot of City of Calgary detailed inventory.



Sample of Vacant Suburban Residential Land Inventory

2015 April Civic Census Parcel Inventory

- Existing/Other
- Vacant
- Under Construction

Remaining Residential Supply

- 2015 Approved Tentative Plans (Subdivided)
- 2015 Vacant Approved Tentative Plans (Subdivided)
- 2015 Non-Approved Tentative Plans (Unsubdivided)
- 2015 Vacant With Approved Land Use (Unsubdivided)
- 2015 Vacant With Approved Area Structure Plan (Unsubdivided)

Other

- Land Use Boundaries
- Employment Concentrations
- Regional Standing Water

Understanding the Available Supply (of Lands available to the development industry)

Unsubdivided Serviced with Land Use Approved

These areas are fully serviced (no further City infrastructure is required) have land use and outline plan in place. These areas are available for tentative plan submissions by the Developer to the City for delivery to the market of serviced single family/semi-detached and multi-family lots. (The developer still has to apply for subdivision and pay for the final service connections from City infrastructure to every individual lot and create fully serviced parcels, and they do tend to delay this final cost in keeping with demand from the building community).

At this point – the lands have Approved ASP/OP/are fully serviced and are lying fallow until tentative plans are submitted - The City has little to say about the timing/delivery of the final serviced lot to the home builder. The City waits for the industry to submit tentative plans on this land. Conforming to the approved land use the tentative plans are generally processed within the standard '60 day' window.

Data Source

Inventory data is collected from Developer submitted "anticipated" units from both Land Use approvals and Subdivision approvals submissions

Caveats? And Issues with Monitoring

Understanding the Data

As many in the residential construction and land development industry are aware, there is an annual lot count analysis compiled by a private company that physically observes how many single family lots have deep utilities installed ("water valve/pipe out of the ground") which typically indicates construction of a house can occur on a site

In the new report, *The Developing Suburban Communities Supply Monitoring Report*, developed jointly between The City of Calgary with UDI-Calgary and CHBA-Calgary Region takes into account these fully serviced lots and also captures lots that have been granted subdivision approval (approved tentative plan). City leading infrastructure is in place but the lots still require utility servicing by the developer.

There may be a gap in the serviced supply indicated by the private lot count analysis and the numbers contained within this new report. This potential gap would be due to the additional information collected as indicated above, along with other changes in methodology that include time of year the initial data is compiled and the number of building permits recorded monthly.

It is important to note that any difference between the reports should not be seen as a deficiency of either reporting mechanism but rather an opportunity for the industry to gain a better understanding of the number of lots expected to come on stream within the near term as the lot servicing is completed (and become construction ready). This is a positive step forward as in the past this information has been very difficult to obtain.

Building Permit Land Area Estimates

As we do not have land area calculations for the Building Permits information a proxy to calculate the land area is used. This is done by simply taking the derived mathematically calculated Units Per Hectare values of the subdivided lands as taken from the original April Land inventory. This is a reasonable method to determine the land area of the permits as these are the same areas that are currently considered subdivided and we know the units and remaining land, densities and the number of permits or units from these lands.

Negative Values Reported?

The detailed Suburban Lands Inventory is compiled using Civic Census, Registered vacant lots and Developer "Anticipated Units" as the starting point of the inventory dated April of each year. As monthly monitoring is done after the inventory there are cases where the Subdivision approval for lots and units may be higher than what The City Inventory originally recorded in April. This is true of building permits as well. In cases where this happens a negative number may be the result.

i.e., Anticipated units in Evanston may be for 300 single family units and 400 multi units on a particular land use site area. However as the subdivision and building permits are applied for there could be a case that it ended up being 310 single family and 480 multi units. This would cause the negative number. This would be adjusted in the next detailed Suburban Residential Growth detailed inventory (yearly report).

Amendment of Outline Plan

Any amendment of an approved Outline Plan was not included to avoid double counting in Monthly report, but annual adjustment will be made to reflect the changes.

Cancelled Building Permit

The Developing Suburban Communities Supply Monitoring Report report does not reflect changes for cancelled building permits, but annual adjustment will be made to reflect the changes.

Census Dwelling Count for Under-construction Dwellings

The Developing Suburban Communities Supply Monitoring Report uses Civic Census dwelling count as the base number. Under construction dwellings could be missed out if foundations are not in place or addresses are not posted properly.

Subdivision of Multi-family Sites

Multi-family sites usually go through multiple subdivision applications to create legal lots (units) that could be sold to individuals. For the purpose of Lot Supply report, UDA and City of Calgary agreed to count the very first subdivision application of the sites, and the number of units are determined by the anticipated units from approved Outline Plans.

[Pending Subdivision Applications](#)

These are the subdivision applications that are accepted by the City and waiting for a decision. These may be fully serviced (no further City infrastructure is required), partially serviced (some services in place), or no services in place at all. Reported applications in this report does not guarantee approval of the applications. Subdivision authority may approve or refuse these applications based on their planning merits.

[Annual True-up](#)

The annual true-up process takes the April 2015 land supply information from the Suburban Residential Growth (SRG) 2016-2020 report as the new starting point. By taking the SRG numbers for monthly lot supply report, the process eliminates any double counting and under estimation of land supply.

It is important to note that the SRG land absorption is based on 2015 Civic Census data, whereas the monthly lot supply report uses issued building permits as absorption. As the Civic Census counts existing and under construction buildings as absorption, SRG report provides the true picture of the estimated vacant subdivided land capacity in a community.

For unsubdivided land supply, the SRG uses both Outline Plans (OPs) and land use redesignation applications, whereas the monthly report only uses the very first Outline Plan application for an area and excludes all land use redesignation applications. So, by using the SRG unsubdivided supply as a starting point, the monthly report addresses any reconfigured OPs and land use redesignations.