

## Community Partner Reference Guide

# LEASE OR LICENCE OF OCCUPATION (LOC)

**Do you have a lease or License of Occupation agreement (LOC) with The City of Calgary for the use of public land? (facility, community garden, etc.)**

As part of your agreement, there are ongoing requirements your organization should be familiar with. Below are some questions for board members about your lease or License of Occupation.

## DID YOU KNOW...

A lifecycle assessment is a tool to plan and manage repairs and maintenance.

The Annual Return is what a society files with Corporate Registry each year; the Proof of Filing is the letter that Corporate Registry returns to the society confirming an active or inactive status.

### Q: Have you submitted your annual required paperwork?

Each year a lease or LOC holder is required to make sure the following items are on file with The City: audited financial statements, annual proof of filing, annual charitable return (if applicable), insurance, sub-licenses, capital budget and current business plan. All information can be submitted to your City liaison.

### Q: Are you aware of the processes and policies that can affect the way you approach your work?

Anytime lifecycle maintenance or renovation, improvement, addition, etc. is planned, there are processes and policies that may need to be followed. Your project could require City approval, a technical review, financial review, and development permit, building permit, insurance coverage or final inspections. Please connect with your City liaison for support.

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**Your audited financial statements are due to The City of Calgary within 30 days of your annual general meeting.**

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### Q: Are you compliant with all other regulatory bodies you are accountable to (i.e. Corporate Registries, Alberta Gaming and Liquor Commission, Canada Revenue Agency)?

Lease/LOC holders are required to meet all regulatory and legislative requirements for their programs, services and facility.

### Q: Are your activities, and/or activities of renters or sub-license /lease holders compliant with relevant City policies and regulations? (i.e. Public Use Policy, Bylaws, Fire Regulations, etc.)

As your organization is responsible for public land, it must follow all relevant City of Calgary regulations, policies and bylaws.

## For more information in license/Lease occupation requirements

Contact your City liaison (i.e. neighbourhood partnership coordinator, sports coordinator), for support, detailed information, resources, required forms and orientation to your license or lease of occupation.

## LEASE/LOC REQUIREMENTS CHECKLIST

LOC Section	General	Yes	No	In Process	Comments
<a href="#">CSPS011</a>	Have all individual board members received a lease or LOC orientation from your City liaison at the beginning of their board term (i.e. neighbourhood partnership coordinator, sports coordinator)?				
14.6	Have you submitted a copy of your most recent bylaws, bylaw amendments or articles, to the City of Calgary within 30 days of being approved, stamped and registered by AB Corporate Registry?				
14.7	Have you submitted your annual proof of filing from AB Corporate Registry to your City liaison?				
14.8	Have you submitted your annual Charitable Tax Return from Canada Revenue Agency to your city liaison (if applicable)?				
15.4 (2.1)	Have you submitted a business plan and operating budget, approved by the Board of Directors, that identifies how you will distribute resources and meet demonstrated community needs to your City liaison? (Definition in 2.1)				
15.5	Do you know when your business plan and budget should be resubmitted (every five years or upon expiration, whichever comes first)?				
15.6	Have you met with your City liaison to discuss, review and create action plans for your priorities and current business plan; reviewed your lifecycle study, and status of repairs and maintenance to the lands and facility (completed to date, no less than two times per year)?				
9.2	Do your activities and the activities of your renters or sub-licensees meet relevant City of Calgary policies including the <a href="#">Public Use Policy</a> ?				
9.5	Are your activities and activities of your renters or sub licensees aligned with the land use bylaw/discretionary uses and the <a href="#">Municipal Government Act</a> ?				
9.12 (17.3)	Have your sub-licenses been approved by The City of Calgary?				
13.1	Have you submitted your valid insurance policy to your City liaison within 30 days of renewal or changes? (Policy to include an "all risks" property insurance policy insuring the facility and improvements on the lands for their full replacement cost, list The City as an additional name insured and is for no less than five million dollars)				
16.2	Have you held your annual general meeting (AGM) as stated in your bylaws?				
15.1	Have you submitted your signed, audited financial statements to your City liaison within 30 days of your AGM?				
15.1	Have your audited financial statements been presented to your membership for review at your AGM?				
11.2	Have you reviewed your lifecycle assessment and created a plan for needed work in partnership with your City liaison and/or Facility Operator Coordinator (FOC)?				
11.2	Does your budget reflect a reserve fund or savings for upcoming lifecycle work?				
11.2	Have you dealt with any urgent facility or space issues or repairs?				