

**BYLAW 866-P-03-23
TOWN OF COALDALE
PROVINCE OF ALBERTA**

**BEING A BYLAW OF THE TOWN OF COALDALE
PROVIDING FOR THE IMPOSITION OF AN OFF-SITE LEVY IN RESPECT
OF LAND TO BE DEVELOPED OR SUBDIVIDED**

WHEREAS Section 648 of the *Municipal Government Act* authorizes Council to pass a bylaw to:

- a) Provide for the imposition and payment of levy Off-Site in respect of land within the Town that is to be developed or subdivided; and
- b) Authorize an Agreement to be entered into in respect of the payment of the levy.

AND WHEREAS the *Municipal Government Act* provides that an Off-Site Levy may only be used to pay for all or part of capital costs of any or all of the following:

- a) New or expanded facilities for the storage, transmission, treatment or supplying of water;
- b) New or expanded facilities for the treatment, movement or disposal of sanitary sewage;
- c) New or expanded storm sewer drainage facilities;
- d) New or expanded roads required for or impacted by a subdivision or development;
- e) Subject to the regulations, new or expanded transportation infrastructure required to connect, or to improve the connection of, municipal roads to provincial highways resulting from a subdivision or development;
- f) Land required for or in connection with any facilities described in clauses a-e;
- g) New or expanded community recreation facilities;
- h) New or expanded fire hall facilities;
- i) New or expanded police station facilities;
- j) New or expanded libraries.

AND WHEREAS the Council of the Town of Coaldale finds that sharing the benefits of development equally across the Development Region is the most effective and efficient way to achieve both the orderly, economical and beneficial development, use of land and patterns of human settlement and the maintenance and improvement of the quality of the physical environment;

AND WHEREAS the bylaw was advertised in accordance with section 606 of the *Municipal Government Act* and the Town of Coaldale Public Notification and Advertising Bylaw 814-R-05-21;

NOW THEREFORE the Town of Coaldale Council enacts as follows:

PART I – TITLE, PURPOSE AND DEFINITIONS

- 1. This bylaw may be cited as the “Off-Site Levy Bylaw”.

Purpose

2. The purpose of this Bylaw is to impose off-site levies for water, storm sewer drainage, sanitary sewage and roads required for or impacted by subdivision or development on all land within the Town that is developed or subdivided.

Definitions

3. In this Bylaw, unless the context otherwise requires:
 - a. “Arterial Road Right of Way” means Land that is used for an arterial road and other infrastructure and is designated as an Arterial Road in the Town of Coaldale Transportation Master Plan, or other road meeting arterial road design standard per the Town’s adopted Design Standards.
 - b. “Town” means the Town of Coaldale.
 - c. “Council” means the elected council of the Town.
 - d. “Development” means:
 - i. A change of use of land, or an act done in relation to land that results in or is likely to result in a change in the use of the land, or
 - ii. A change in the intensity of the use of land or an act done in relation to land that results in, or is likely to result in, a change of the intensity of the use of the said land.
 - e. “Development Region” means the benefiting area shown on the map included in the report attached as **Appendix B**.
 - f. “Gross Development Area” means each and every hectare or part thereof as show on a plan for the development which has been approved by the Development Authority, or on a Plan of Subdivision which has been approved by the Subdivision Authority, including any are which may be dedicated or used for roads, lanes, walkways, parks, reserve parcels, schools or any other public use.
 - g. “Growth” is the creation of new serviced residential, commercial, or industrial lots from previously un-serviced land.
 - h. “Levy” means the Off-Site Levy for each of water, sanitary sewage, storm sewer drainage or roadways imposed and collected pursuant to this Bylaw.
 - i. “Net Development Area” means the area remaining after deletion of the following lands from the Gross Development Area:
 - i. Previously developed lands for which Off-Site Levies have already been paid;
 - ii. Road rights-of-way for expressways and arterial roadways as designated by the Town;
 - iii. Environmental Reserves as defined in the *Municipal Government Act*;
 - iv. Municipal Reserves as defined in the *Municipal Government Act*;
 - v. School Reserves as defined in the *Municipal Government Act*;
 - vi. Municipal and School Reserves as defined in the *Municipal Government Act*;
 - vii. Oil and gas pipeline rights-of-way and facilities necessary for the operation of the pipeline; and
 - viii. Railway rights-of-way.

- j. "Sanitary Sewer Off-Site Infrastructure" means the new or expanded facilities for the storage, transmission, treatment or disposal of sanitary sewage identified in **Appendix B** of this Bylaw for which a Sanitary Sewer Off-Site Levy shall be imposed.
- k. "Sanitary Sewer Off-Site Levy Rate" means the per hectare rate to be used to determine the Sanitary Sewer Off-Site Levy to be imposed and collected from land being developed or subdivided in the Development Region for the Sanitary Sewer Off-Site Infrastructure.
- l. "Stakeholders" are defined in the *Municipal Government Act* and include interested members of the development community.
- m. "Storm Sewer Off-Site Infrastructure" means the new or expanded storm sewer drainage facilities identified in **Appendix B** of this Bylaw for which a Storm Sewer Off-Site Levy shall be imposed.
- n. "Storm Sewer Off-Site Levy Rate" means the per hectare rate to be used to determine the Storm Sewer Off-Site Levy to be imposed and collected from land being developed or subdivided in the Development Region for the Storm Sewer Off-Site Infrastructure.
- o. "Transportation Off-Site Infrastructure" means the new or expanded transportation infrastructure required to service growth as identified in **Appendix B** of this Bylaw for which a Transportation Off-Site Levy shall be imposed.
- p. "Transportation Off-Site Levy Rate" means the per hectare rate to be used to determine the Transportation Off-Site Levy to be imposed and collected from land being developed or subdivided in the Development Region for the Transportation Off-Site Infrastructure.
- q. "Water Off-Site Infrastructure" means the new or expanded facilities for the storage, transmission, treatment or supply of water identified in **Appendix B** of this Bylaw for which a Water Off-Site Levy shall be imposed.
- r. "Water Off-Site Levy Rate" means the per hectare rate to be used to determine the Water Off-Site Levy to be imposed and collected from land being developed or subdivided in each basin for the Water Off-Site Infrastructure.

PART II – RATES OF OFF-SITE LEVIES

- 4. For the purposes of calculating and imposing Off-Site Levies the Town is a single Development Region as shown in the report attached as **Appendix B**.
- 5. The Off-Site Levy Rates (**Appendix A**) for each separate Levy Fund shall be calculated based on the cost of the Off-Site Infrastructure (**Appendix B**).
- 6. The Off-Site Levy Rates (**Appendix A**) may be reviewed annually to ensure that the Rates reflect actual construction costs and are adjusted for inflationary increases.
- 7. The Net Development Area shown in the report attached as **Appendix B** may be reviewed annually to ensure the Rates accurately reflect the available developable area.

Agreement for Services

8. The Town may enter into Agreements in respect of the payment of Off-Site Levies or oversizing credits.

Imposition of Levy

9. An Off-Site Levy shall be imposed on each hectare of Net Development Area within the Town at the time an approval is given for the subdivision of the land or on the date a Development Permit is approved for development on the land.
10. Levies are deemed to have been imposed whether or not the imposition of the Levies is made a specific condition of the subdivision approval or development permit.

General

11. Nothing in this Bylaw precludes the Town from:
 - a. Imposing further or different Levies, duly enacted by Bylaw, on any portion of the lands within the Town in respect of which the Town has not collected an Off-Site Levy imposed under this Bylaw or any previous Off-Site Levy Bylaw authorized by statute;
 - b. Deferring collection of an Off-Site Levy on any portion of the lands within the Town in respect of which the Town has not collected Levies, including the requirement for security for the payment of such deferred Off-Site Levy; and
 - c. Reducing or forgiving payment of an Off-Site Levy required pursuant to the Bylaw.
12. Council may from time to time adopt policies or guidelines for the assistance and direction of the Chief Administrative Officer in determining which Development and Subdivision applications shall require a Development Agreement or where to defer (and to require security for deferred payment) or waive collection of the Off-Site Levy imposed pursuant to this Bylaw.

Transition

13. This Bylaw applies to any:
 - a. Subdivision approved on or after the date this Bylaw comes into force; and
 - b. Development where the issuance of the development permit occurs on or after the date this Bylaw comes into force.

Severability

14. If any portion of this Bylaw is declared or held to be invalid for any reason the remaining provisions of the Bylaw shall continue to be in full force and effect.

Repeal

15. Bylaws 582-C-08-07 and 730-C-06-17 are hereby repealed.
16. Any Off-Site Levy imposed under previous Bylaws but not yet paid shall continue to be imposed and collected as though the Bylaw under which they were enacted was never repealed.

Effective Date

17. This Bylaw shall come into full force and effect when this Bylaw has achieved third reading and is duly signed.

READ a FIRST time this 13th day of March, 2023, for Off-Site Levy Bylaw 866-P-03-23.

Mayor – Jack Van Rijn
Motion: 71-2023

CAO – Kalen Hastings

Public Hearing for Offsite Levy Bylaw 866-P-03-23 was held at 5:05pm at the Regular Council Meeting on May 23, 2023.

READ a SECOND time this 23rd day of May, 2023, for Off-Site Levy Bylaw 866-P-03-23.

Mayor – Jack Van Rijn
Motion: 181-2023

CAO – Kalen Hastings

READ a THIRD and FINAL time this 23rd day of May, 2023, for Off-Site Levy Bylaw 866-P-03-23.

Mayor – Jack Van Rijn
Motion: 182-2023

CAO – Kalen Hastings

CAO – Kalen Hastings

APPENDIX A – OFF-SITE LEVY RATES

Category	Amount (Net Developable Area)
Water	\$50,253/Hectare
Wastewater	\$68,834/Hectare
Storm Sewer	\$0/Hectare
Transportation	\$65,679/Hectare
Facilities	\$0/Hectare
Total	\$184,766/Hectare

APPENDIX B – OFF-SITE LEVY REPORT

**** SEE ATTACHED**



Off-Site Levy Review

Town of Coaldale

FINAL REPORT


April 2023



ISL Engineering and Land Services Ltd. Is an award-winning full-service consulting firm dedicated to working with all levels of government and the private sector to deliver planning and design solutions for transportation, water, and land projects.

Proudly certified as a leader in quality management under Engineers and Geoscientists BC's OQM Program from 2014 to 2021.



Integrated Expertise. Locally Delivered. 



416B Stafford Drive South, Lethbridge AB T1J 2L2, T: 403.327.3755 F: 403.327.3454

April 18, 2023

Our Reference: 27907

Town of Coaldale
1920 – 17 Street
Coaldale, Alberta
T1M 1M1

Attention: Jason Siemens, P.L.(Eng.)

Dear Jason:

Reference: Town of Coaldale Off-Site Levy Review

Enclosed is the Final Report for the Town of Coaldale Off-Site Levy Review. We trust that it meets your needs.

The purpose of the report is to provide the full costing details for water, wastewater, and transportation infrastructure required to accommodate the Town's 25-year growth boundary. The Town needs to consider what rates are appropriate to remain attractive to development, with these provided for the Town's reference in the development of their bylaw. It is noted that these rates presented are higher than the current off-site levy rates.

This analysis does not consider debenture-based financing, which, when factoring the time value of money, would increase rates to factor in debt carrying costs and levy collection rates. However, a finance factor has been applied to project costs to account for inflation. The Town may wish to consider debenture-based financing information in its consideration of these rates.

We sincerely appreciate the opportunity to undertake this project on your behalf. Should you have any questions or concerns, please do not hesitate to contact the undersigned.

Sincerely,

Evan Abramenko, P.L.(Eng.), LEED GA
Municipal Manager


Corporate Authorization

This document entitled “Off-Site Levy Review” has been prepared by ISL Engineering and Land Services Ltd. (ISL) for the use of Town of Coaldale. The information and data provided herein represent ISL’s professional judgment at the time of preparation. ISL denies any liability whatsoever to any other parties who may obtain this report and use it, or any of its contents, without prior written consent from ISL.



2023-04-18

Krista Audia, P.Eng.
Technical Author

<p>Permit to Practice <i>ISL Engineering and Land Services Ltd.</i></p> <p>RM Signature: <u></u></p> <p>RM APEGA ID: <u>66731</u></p> <p>Date: <u>18 April 2023</u></p> <p>Permit Number P4741 The Association of Professional Engineers and Geoscientists of Alberta</p>
--

Geoffrey Schulmeister, P.Eng., SCPM
Senior Reviewer

Executive Summary

Background

The Town of Coaldale (the Town) engaged ISL Engineering and Land Services Ltd. (ISL) to undertake an off-site levy review to ensure up-to-date rates are used and adequate capital is collected from land development to fund off-site infrastructure required to support growth. The Town previously updated its off-site levy rates in 2007 based on the Off-Site Levy and Development Charges Review (MPE, 2007).

Since then, a new Infrastructure Master Plan (IMP) incorporating water, wastewater, stormwater, and transportation was developed by MPE Engineering Ltd. (MPE) in 2019 as well as a new Transportation Master Plan (TMP) by WATT Consulting Group (WATT) in 2020. Based on the changes to future infrastructure upgrading needs, it is appropriate that the Levy Bylaw be updated to reflect future growth areas and supporting infrastructure.

The recommendations of this Off-Site Levy Review are based on the following principles:

- That the capital cost of infrastructure improvements that support and benefit growing areas should be borne by those growing areas. These costs should be financed through levies collected on development in each area of the Town.
- That the capital cost of infrastructure improvements with Town-wide benefit should be appropriately shared between growing areas and the existing population, with the component borne by the growing areas to be financed through levies collected on development by the Town.
- That the capital cost and implementation of on-site and adjacent improvements should be borne by the subject development and included in Standard Development Agreements, with inclusion in the levy program.
- That levies should reflect as closely as possible the full capital costs of constructing new infrastructure, with adjustments over time to reflect additional or reduced costs.
- That the establishment of levies and future adjustments be done through a transparent process.

Off-Site Levy Rate Summary

Off-site levy rates may be evaluated using either uniform or benefiting area rates; however, the Town has elected to maintain uniform rates for all types of infrastructure as outlined above. A summary of the off-site levy rates is provided in Table ES.1.



Table ES.1 Off-Site Levy Rate Summary

Infrastructure	Current Levies		Proposed Levies				Change in Levies		
	Inside Town Boundary ¹	Outside Town Boundary ¹	Priority 1	Priority 1A	Priority 1B	Combined	Combined Minus Existing Balances	Inside Town Boundary	Outside Town Boundary
	\$/ha	\$/ha	\$/ha	\$/ha	\$/ha	\$/ha	\$/ha	\$/ha	\$/ha
Water	\$12,267	\$12,486	\$53,041	\$0	\$0	\$53,041	\$50,253	\$37,986	\$37,767
Wastewater	\$26,263	\$6,309	\$55,313	\$13,522	\$0	\$68,834	\$68,834	\$42,571	\$62,525
Stormwater	\$21,136	\$5,534	\$0	\$0	\$0	\$0	\$0	-\$21,136	-\$5,534
Transportation	\$35,163	\$35,641	\$6,854	\$14,052	\$46,072	\$66,978	\$65,679	\$30,516	\$30,038
Facilities	-	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total	\$85,575²	\$89,460	\$115,207	\$27,574	\$46,072	\$188,853	\$184,765	\$99,190³	\$99,190³

¹ These off-site levy rates are based on the Off-Site Levy and Development Charges Review (MPE, 2007).

² This off-site levy rate is not the sum of the rates outlined above for each infrastructure type from Off-Site Levy and Development Charges Review (MPE, 2007), but the off-site levy rate outlined in the Off-Site Levy Bylaw (Coaldale, 2007).

³ This change in off-site levy rate is not the sum of the change in rates outlined above for each infrastructure type from Off-Site Levy and Development Charges Review (MPE, 2007), but the off-site levy rate outlined in the Off-Site Levy Bylaw (Coaldale, 2007).

Conclusions

The Town's off-site levies will be charged to any new or incremental development in the Town that will impact the need for upgrades in infrastructure, including the following:

- Water supply and distribution infrastructure
- Wastewater sewer collection and treatment infrastructure
- Transportation infrastructure

It should be noted that stormwater and facilities infrastructure has not been included in the calculation of off-site levy rates as part of this Off-Site Levy Review.

Additional assumptions pertaining to the infrastructure projects and the proportions of costs carried in the off-site levy rate calculations for each infrastructure type are outlined in the following sections.

General assumptions are as follows:

- Off-site levy rates can be broken down using uniform or benefiting area rate methodology.
- Potential grant funding of infrastructure is not included in this report.
- No interest or carrying charges have been included at this stage.
- Details of potential endeavours to assist will be detailed by the Town in the formal off-site levy policy and/or future development agreements.
- Off-site levy rates are based on net development area as noted above.
- Projects are considered to benefit future development only or shared between future development and the existing population.
- All projects are considered to provide global benefit to the Town. Therefore, levy rates were calculated on a uniform basis.
- Cost estimates are based on the supporting planning documents as well as Town project budgets and estimates with an inflation factor applied to account for the increased cost of the project in the proposed construction year.
- Project timelines are based on the Town's proposed project construction/implementation years.
- Residual benefit of the infrastructure projects for the existing population were provided by the Town and vary depending on type of infrastructure and specific project.

The current payment and timing policy, as specified in the existing bylaw, requires that the levies be paid based on the following: "...50% payable upon signing of a Development Agreement; and, 50% payable four (4) months after signing of a Development Agreement" and "no development shall proceed until payment of the levy...above is paid in full". Comparing this payment and timing policy to the surrounding municipalities, the Town is consistent with other municipalities.



Recommendations

Recommendations related to the Town's off-site levy update are as follows:

- The Town should consider implementing those rates contained herein; however, the Town may choose to set lower rates to be competitive with other municipalities.
- The Town may wish to consider lower levy rates for non-residential development, given its typically positive implications on the municipal tax base.
- The Town should consider the suitability of the recommended rates for its purposes.
- The Town should determine which timing methodology to utilize in the Off-Site Levy Bylaw.
- The Town should review the off-site levy rates once a year to update the associated infrastructure project assumptions, costing, and timelines. This review is to support annual reporting requirements outlined in the MGA, which include details regarding levies collected and spent, and must be made publicly available (Brownlee LLP, 2019).
- The Town should complete a detailed review of the Off-Site Levy Bylaw every three to five years (Brownlee LLP, 2019).

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1.0 Introduction

The Town of Coaldale (the Town) engaged ISL Engineering and Land Services Ltd. (ISL) to undertake an off-site levy review to ensure up-to-date rates are used and adequate capital is collected from land development to fund off-site infrastructure required to support growth. The Town previously updated its off-site levy rates in 2007 based on the Off-Site Levy and Development Charges Review (MPE, 2007).

Since then, a new Infrastructure Master Plan (IMP) incorporating water, wastewater, stormwater, and transportation was developed by MPE Engineering Ltd. (MPE) in 2019 as well as a new Transportation Master Plan (TMP) by WATT Consulting Group (WATT) in 2020. Based on the changes to future infrastructure upgrading needs, it is appropriate that the Levy Bylaw be updated to reflect future growth areas and supporting infrastructure.

Off-site levy policies (which include not only rates, but in some situations more important issues such as who frontends upgrade costs, the levy collection timing, etc.) may impact a municipality's ability to attract and maintain developments. This is especially true for commercial and industrial developments that may not require the same level of services as residential developments, which makes it easier for them to locate in a rural environment. A healthy commercial and industrial base is critical for a municipality's fiscal sustainability as revenues from residential developments often only cover in the order of 80% to 90% of their associated costs. The opposite is true for commercial and industrial developments, as their revenues may cover in the order of 140% to 160% of their associated costs.

The recommendations of this Off-Site Levy Review are based on the following principles:

- That the capital cost of infrastructure improvements that support and benefit growing areas should be borne by those growing areas. These costs should be financed through levies collected on development in each area of the Town.
- That the capital cost of infrastructure improvements with Town-wide benefit should be appropriately shared between growing areas and the existing population, with the component borne by the growing areas to be financed through levies collected on development by the Town.
- That the capital cost and implementation of on-site and adjacent improvements should be borne by the subject development and included in Standard Development Agreements, with inclusion in the levy program.
- That levies should reflect as closely as possible the full capital costs of constructing new infrastructure, with adjustments over time to reflect additional or reduced costs.
- That the establishment of levies and future adjustments be done through a transparent process.

2.0 Background Document Review

As part of this Off-Site Levy Review, ISL performed a review of the existing Town of Coaldale Off-Site Levy Bylaw, the Municipal Government Act, and the off-site levy bylaws of neighbouring municipalities. A brief summary of these reviews is discussed in this section.

2.1 Original Off-Site Levy Bylaw

The original Off-Site Levy Bylaw 426-C-11-99 (Coaldale, 1999) came into effect in 1999 but was rescinded in 2000 via Bylaw 438-C-02-00 (Coaldale, 2000). A summary of the findings in the original bylaw is as follows:

- Off-site levies were calculated based on gross development area and proposed density.
- Water, wastewater, and stormwater, and infrastructure project costs were included in the development of levy rates.
- An allocation of project costs to existing development, if applicable, was not specified in the Off-Site Levy Bylaw.
- A uniform levy rate was applied in the Off-Site Levy Bylaw as an average of the proposed rate for each benefiting area.
 - Different rates were applied to industrial and non-industrial (residential, commercial, and institutional) land.
 - The total off-site levy rate was \$8,190/ha and \$10,425/ha for industrial and non-industrial land, respectively.

2.2 Previous Off-Site Levy Review

This report identified future developable areas, infrastructure to service those areas, costing of the infrastructure projects, and preparation of off-site levy rates to inform the Off-Site Levy Bylaw 582-C-08-07 (Coaldale, 2008). A summary of the findings in this report is as follows:

- Future water, wastewater, stormwater, and transportation infrastructure projects were considered in the calculation of the proposed off-site levy rates.
- Based on the proposed infrastructure projects and developable land areas, it was observed that only infrastructure projects required to facilitate future development were included in the levy rate calculations. Existing system upgrades appear to have largely been excluded except for the lagoon and pump station upgrades in order to accommodate future development.
- The Off-Site Levy and Development Charges Review (MPE, 2007) noted proposed levy rates ranging from \$59,970/ha to \$94,829/ha for the area within and outside of the Town's 2007 municipal boundary, respectively. These rates were based on the current project costs only.
- With the incorporation of inflation and financing costs as well as the application of a uniform levy rate to all development areas, the following rates were proposed.
 - \$84,700/ha with gross area application
 - \$94,100/ha with net area application, assuming 10% of the development area is allocated to Municipal Reserve (MR).

2.3 Current Off-Site Levy Bylaw

The current Off-Site Levy Bylaw 582-C-08-07 (Coaldale, 2008) came into effect in 2008 based on the Town of Coaldale Off-Site Levy and Development Charges Review (MPE, 2007). A summary of the findings in the bylaw is as follows:

- Off-site levies were applied to both undeveloped land within the Town's 2007 municipal boundary and undeveloped land outside the Town's municipal boundary.
 - The levy charges apply to any development within the town boundary in excess of one acre.
- It was not specified whether the off-site levies were calculated based on gross or net development area. However, based on the Off-Site Levy and Development Charges Review (MPE, 2007), these charges are based on gross development area as net area application increases the proposed levy rates.
- Water, wastewater, stormwater, and transportation infrastructure project costs were included in the development of proposed levy rates.
- An allocation of project costs to existing development, if applicable, was not specified in the Off-Site Levy Bylaw.
- A uniform levy rate was applied in the Off-Site Levy Bylaw. The total off-site levy rate was \$55,000/ha and increased to \$85,575/ha in 2008 to account for financing over a 50-year period.

2.4 Amended Off-Site Levy Bylaw

The Town's 2008 Off-Site Levy Bylaw 582-C-08-07 was amended in 2017 by Bylaw 730-C-06-17. This document amended the applicability of the off-site levy bylaw to address the deferral of off-site levies for land that was previously connected to servicing infrastructure, may undergo future development at which time off-site levies will be collected, and services are not to be provided for.

2.5 Municipal Government Act

The governing authority for the off-site levy bylaw is the Municipal Government Act (MGA), which states in Section 648(2), that the off-site levy may be used to pay for all or part of the capital cost of any or all of the following:

- New or expanded facilities for the storage, transmission, treatment or supplying of water;
- New or expanded facilities for the treatment, movement or disposal of wastewater;
- New or expanded storm sewer drainage facilities;
- New or expanded roads required for or impacted by a subdivision or development; and
- Land required for or in connection with any facilities described above.

As of January 1, 2018, an addition to the MGA states in Section 648(2.1) that an off-site levy may also be used to pay for all or part of the capital cost, including the cost of any related appurtenances and land required for or in connection with any of the following purposes:

- New or expanded community recreation facilities;
- New or expanded fire hall facilities;
- New or expanded police station facilities; and
- New or expanded libraries.



It should be noted that facility costs have not been included in this Off-Site Levy Review but may be added in the future following studies addressing the potential need for and benefit of these facilities.

2.6 Off-Site Levy Bylaws of Neighbouring Municipalities

The review of the off-site levy bylaws of neighbouring municipalities is intended to create a benchmark for the Town of Strathmore and included the following municipalities:

- City of Brooks
- City of Calgary
- Town of Coalhurst
- Town of High River
- City of Lethbridge
- City of Medicine Hat
- Town of Nanton
- Town of Okotoks
- Town of Taber

Table 2.1 provides an overview of the current levy rates, included infrastructure categories, and developable area assumptions, which may be currently under review. These rates are the combined total for water and wastewater rates as well as stormwater and transportation where applicable. It should be noted that these rates are based on the net developable area when area application is specified in the municipality's bylaw.



Table 2.1 Summary of Neighbouring Municipalities for Off-Site Levy Bylaw Comparison

Municipality	Year ¹		Rate Type	Developable Area Considered	Infrastructure Inclusion					Off-Site Levies per Hectare	
	Bylaw	Rate			Water	Wastewater	Stormwater	Transportation	Facilities	Minimum	Maximum
Brooks	2007	2007	Benefiting Area	Net	●	●	●	●		\$15,803	\$60,252
Calgary	2019	2022	Benefiting Area	Net	●	●	●	●	●	\$490,527	\$540,755
Coalhurst	2013	2017	Uniform	Not Specified	●	●	●	●		\$126,000	
High River	2020	2022	Benefiting Area	Net	●	●	●	●	●	\$144,719	\$258,334
Lethbridge	2022	2023	Uniform	Net	●	●	●	●		\$290,000	
Medicine Hat	2019	2019	Benefiting Area	Net	●	●	●	●		\$139,557	\$407,359
Nanton	2010	2012	Uniform	Not Specified	●	●				\$85,030	
Okotoks	2020	2022	Uniform	Gross	●	●		●		\$202,580	
Taber	2016	2016	Uniform	Net	●	●				\$74,162	

¹Bylaw year refers to the year in which the most recent amendment to the bylaw was completed. The rate year refers to the year that the rate applies to when various rates are identified and dependent on the year of application.



3.0 Growth Projections/Future Developable Areas

3.1 Growth Projections

The existing population of the Town is 8,771 people based on the 2021 Federal Census (Statistics Canada, 2022).

Population projections for the growth area were derived as part of the IMP (MPE, 2020). Based on the 2.37% annual growth rate, the following horizons were assessed:

- Medium-term to 2029 or 10-year horizon (population of 10,985)
- Long-Term to 2044 or 25-year horizon (population of 15,609)
- Full build-out of the Town to 2057 (population of 20,988)
 - This population is based on the 30 people/ha density for the residential areas outside of the 25-year boundary for an additional population of 5,379 beyond the 25-year horizon population.

As this was based on the growth rate experienced by the Town prior to the 2021 Federal Census, a revised population projection scenario was developed. Therefore, the annual growth rate was based on the 10-year average from 2011 to 2021. This information is summarized in Table 3.1.

Table 3.1 Population Growth Rate Horizon

Census	Year	Population ¹	Growth Rate
Federal Census	2011	7,493	-
	2012	7,508	0.20%
Municipal Census	2013	7,526	0.20%
	2014	7,749	2.97%
	2015	7,979	2.97%
Federal Census	2016	8,215	2.97%
	2017	8,371	1.90%
	2018	8,529	1.90%
Municipal Census	2019	8,691	1.90%
	2020	8,731	0.46%
Federal Census	2021	8,771	0.46%
Average			1.59%

¹ Populations between census documents were interpolated for clarity.

This rate was applied to project the population to full build-out of the Town boundary. Table 3.2 shows the population projections for the Town at 5-year intervals with the Town reaching the estimated full build-out population of 20,988, based on the assumptions in the IMP, between 2076 and 2077.

Table 3.2 Population Projections

Year	Population	Year	Population
2021	8,771	2055	14,996
2025	9,342	2060	16,227
2030	10,109	2065	17,559
2035	10,939	2070	19,000
2040	11,836	2075	20,559
2045	12,808	2076	20,886
2050	13,859	2077	21,218

It should be noted that the TMP (WATT, 2020) assumed an annual growth rate of 2% for traffic volume. This assumes that all traffic zones are 100% developed with the exception of Zone 308, which is 50% developed. This zone consists of the three southernmost residential quarter sections, which are largely outside of the 25-year growth horizon. It is recommended that the projected service population and construction year for the infrastructure upgrade projects be adjusted over time based on future growth projections as they evolve.

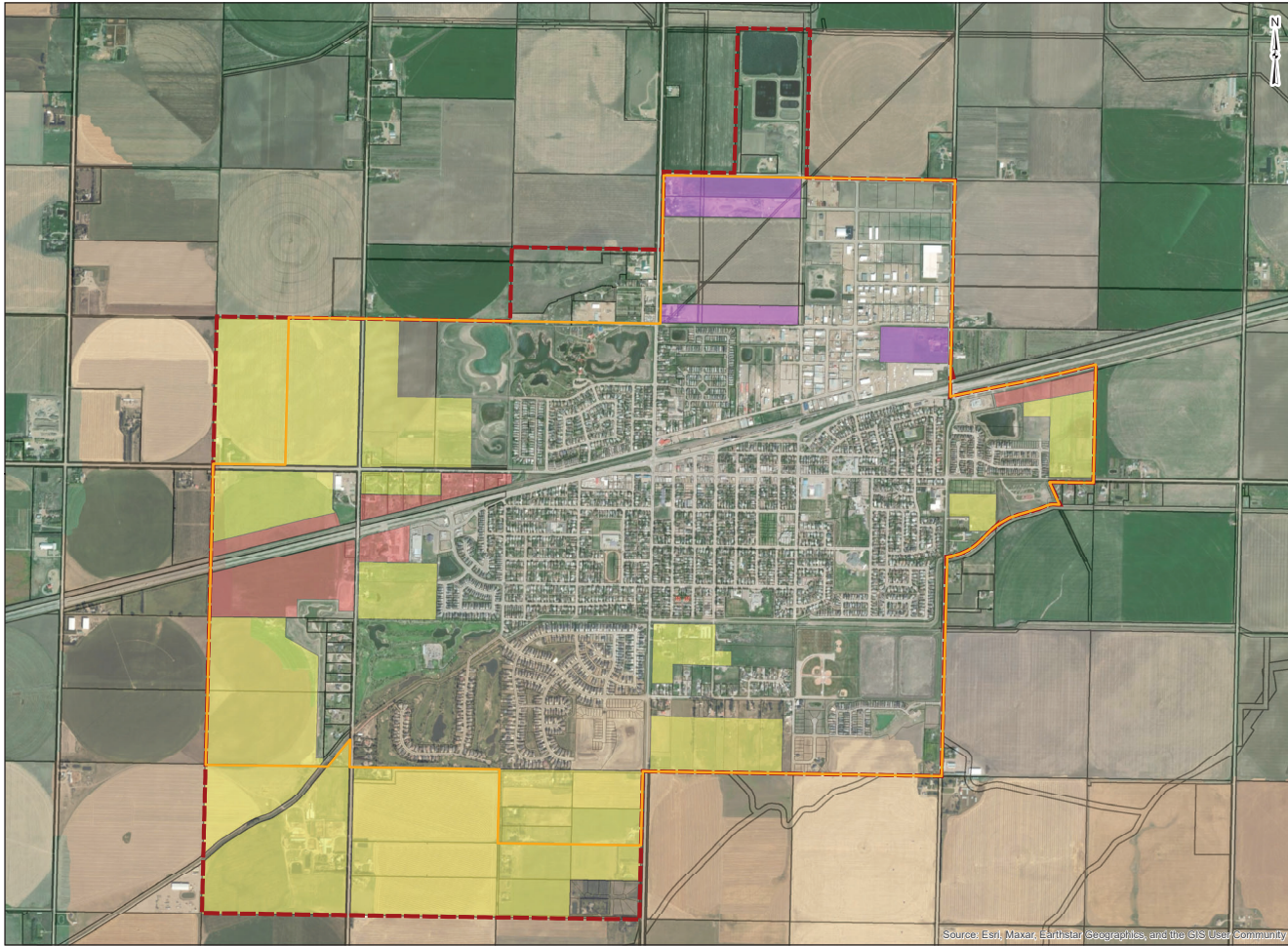
3.2 Development Timeline

The future development timeline was outlined in the 2020 IMP and broken into 10-Year and 25-Year, growth horizons. This was refined by the Town to account for more recent development planning and execution. Full build-out of the Town was not considered in the IMP; therefore, this area was based on the undeveloped area not identified in either of the IMP growth horizons.

A summary of these gross growth areas is provided in Table 3.3 and shown in Figure 3.1.

Table 3.3 Growth Area Summary

Growth Boundary	Area	Percentage of Total
	ha	
Existing	926.12	66%
25-Year Horizon	305.25	22%
Full Build-Out	179.26	13%
Total	1,410.63	100%



Legend

Future Development Area Land Use

- Commercial
- Industrial
- Institutional
- Residential

25-Year Growth Boundary

Town Boundary

0 250 500 1,000 Meters
 1:20,000 NAD 1983 UTM Zone 12N

FIGURE 3.1
 FUTURE DEVELOPMENT AREAS
 TOWN OF COALDALE
 OFF-SITE LEVY REVIEW



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3.3 Developable Area

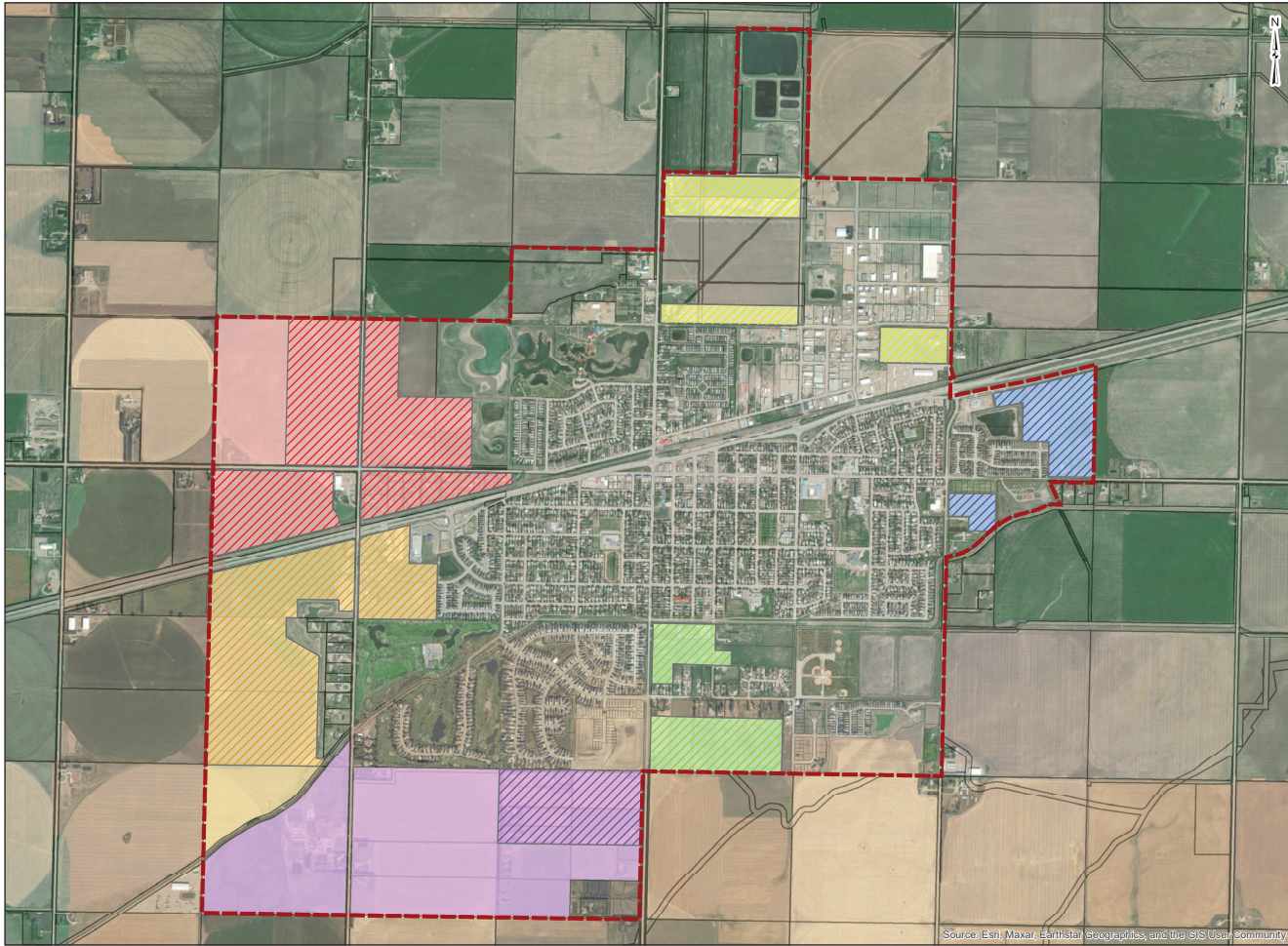
The Town’s gross developable area includes approximately 1,410 ha of land. It is understood that not all of this area is able to be developed. Areas may be dedicated as road rights-of-way, environmental reserves, and municipal reserves. For the purpose of this Off-Site Levy Review, the net developable area was calculated by excluding highway rights-of-way and taking a 10% reduction from the remaining gross area to allow for environmental reserve and municipal reserve requirements.

ISL has reviewed the total developable area and has divided these areas by quadrants and benefiting areas as shown in Figure 3.2. A summary of the gross and net developable areas for these benefiting areas is included in Table 3.4.

Table 3.4 Benefiting Area Summary

Benefiting Area	25-Year Horizon		Full Build-Out ¹	
	Gross	Net	Gross	Net
	ha	ha	ha	ha
East	23.58	21.22	23.58	21.22
Northeast	31.57	28.41	31.57	28.41
Northwest	132.28	119.05	101.08	90.97
Southeast	30.80	27.72	30.80	27.72
Southwest	162.81	146.53	31.27	28.14
West	103.47	93.12	86.95	78.26
Total	484.51	436.06	305.25	274.73

¹ The full build-out area includes the 25-Year Horizon area.



Legend

Benefiting Areas

- East
- Northeast
- Northwest
- Southeast
- Southwest
- West

Benefiting Area Within 25-Year Growth Boundary (Colour Varies)

Town Boundary

0 250 500 1,000 Meters
 1:20,000 NAD 1983 UTM Zone 12N

FIGURE 3.2
 BENEFITING AREAS
 TOWN OF COALDALE
 OFF-SITE LEVY REVIEW

ISL **Town of COALDALE**

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4.0 Off-Site Levy Assumptions

The Town's off-site levies will be charged to any new or incremental development in the Town that will impact the need for upgrades in infrastructure, including the following:

- Water supply and distribution infrastructure
- Wastewater sewer collection and treatment infrastructure
- Transportation infrastructure

It should be noted that stormwater and facilities infrastructure has not been included in the calculation of off-site levy rates as part of this Off-Site Levy Review.

Additional assumptions pertaining to the infrastructure projects and the proportions of costs carried in the off-site levy rate calculations for each infrastructure type are outlined in the following sections.

General assumptions are as follows:

- Off-site levy rates can be broken down using uniform or benefiting area rate methodology.
- Potential grant funding of infrastructure is not included in this report.
- No interest or carrying charges have been included at this stage.
- Details of potential endeavours to assist will be detailed by the Town in the formal off-site levy policy and/or future development agreements.
- Off-site levy rates are based on net development area as noted above.
- Projects are considered to benefit future development only or shared between future development and the existing population.
- All projects are considered to provide global benefit to the Town. Therefore, levy rates were calculated on a uniform basis.
- Cost estimates are based on the supporting planning documents as well as Town project budgets and estimates with an inflation factor applied to account for the increased cost of the project in the proposed construction year.
- Project timelines are based on the Town's proposed project construction/implementation years.
- Residual benefit of the infrastructure projects for the existing population were provided by the Town and vary depending on type of infrastructure and specific project.

4.1 Water Infrastructure Assumptions

Assumptions pertaining to water infrastructure projects as part of this Off-Site Levy Review are as follows:

- Existing system upgrade projects, proposed future system projects, and associated costs are largely based on the 2019 Infrastructure Master Plan and subsequent technical memorandums.



4.2 Wastewater Infrastructure Assumptions

Assumptions pertaining to wastewater infrastructure projects as part of this Off-Site Levy Review are as follows:

- Existing system upgrade projects, proposed future system projects, and associated costs are largely based on the 2019 Infrastructure Master Plan as well as design and construction updates.

4.3 Transportation Infrastructure Assumptions

Assumptions pertaining to transportation infrastructure projects as part of this Off-Site Levy Review are as follows:

- Existing system upgrade projects, proposed future system projects, and associated costs are largely based on the 2019 Infrastructure Master Plan and 2020 Transportation Master Plan in addition to other local transportation studies such as Traffic Impact Assessments (TIAs), etc. This was supplemented by order of magnitude cost estimates.

4.4 Existing Off-Site Levy Accounts

The Town provided the current balances in their off-site levy accounts for each type of infrastructure. These balances are summarized in Table 4.1.

Infrastructure Type	Existing Off-Site Levy Account Balances	
	\$	\$/ha
Water	\$766,000	\$2,788
Wastewater	\$114	\$0
Stormwater	\$568,000	\$2,068
Transportation	\$357,000	\$1,299
Facilities	\$0	\$0
Total	\$1,691,114	\$6,156

5.0 Costing Details

5.1 Inflation Factor

As noted, no interest or carrying charges have been included at this stage; however, an annual inflation factor has been applied to the infrastructure project costs to account for increased costs in the proposed construction year. The inflation factor calculations start in 2016 to account for those transportation infrastructure projects that are based on the Highway 3 and Land O'Lakes Drive Traffic Impact Assessment (MPE, 2016) and are carried to 2047 to account for the 25-year growth horizon of the Town. The inflation factor for each project from cost estimate year to proposed construction year is based on the annual inflation rates as outlined in Table 5.1 below.

Table 5.1 Annual Inflation Rate

Year	Annual Inflation Rate	Year	Annual Inflation Rate
2016	1.27%	2022	6.80%
2017	1.56%	2023	3.20%
2018	2.31%	2024	2.40%
2019	1.88%	2025	2.20%
2020	0.89%	2026	2.20%
2021	2.20%	2027-2047	2.00%

Inflation rates from 2016 to 2022 are actual inflation rates obtained from the Bank of Canada based on the consumer price index (CPI) data from 1914 onward (Bank of Canada, 2022). The inflation rates for 2023-2025 are target values as outlined in the Fiscal Plan Moving Forward 2022-25 (Alberta Treasury Board and Finance Communications, 2022). The inflation rates for 2027 and beyond are consistent with the previous target inflation rates of 2%. It should be noted that the inflation rate for 2022 is based on the inflation rate in January 2023.

5.2 Project Priority

The projects were categorized based on levy suitability and cost estimate status. The three priorities are outlined as follows:

- Priority 1: Suitable off-site levy projects with established cost estimates.
- Priority 1A: Suitable off-site levy projects with established cost estimates that have been initialized or completed. Therefore, off-site levies spent to date must be considered.
- Priority 1B: Suitable levy projects with order of magnitude cost estimates to be refined as more detailed cost estimates become available.



5.3 Water Infrastructure

5.3.1 Water Infrastructure Projects

In order to facilitate Coaldale’s anticipated growth, the following are recommended water projects to be included in the Off-Site Levy Bylaw. The locations of each levied upgrade are shown on Figure 5.1 and summarized in Table 5.2 below. Details for each project are provided in the project sheets in Appendix A.

Table 5.2 Water Infrastructure Project Summary

Project ID	Year	Priority	Growth Benefit	Levied Project Cost
W1	2032	1	75%	\$2,773,220
W2	2038	1	75%	\$2,238,272
W3	2028	1	75%	\$9,560,179

5.3.2 Water Infrastructure Rates

Based on the water infrastructure upgrade projects and costs outlined above, the levy rates for the water infrastructure are summarized in Table 5.3.

Table 5.3 Water Infrastructure Levy Rate Summary

Priority	Benefiting Area	Area	Total Levied	Off-Site Levy
		ha		\$/ha
1	Global	274.73	\$14,571,670	\$53,041
Total		274.73	\$14,571,670	\$53,041

5.4 Wastewater Infrastructure

5.4.1 Wastewater Infrastructure Projects

In order to facilitate Coaldale’s anticipated growth, the following are recommended wastewater projects to be included in the Off-Site Levy Bylaw. The locations of each levied upgrade are shown on Figure 5.2 and summarized in Table 5.4 below. Details for each project are provided in the project sheets in Appendix B.

Table 5.4 Wastewater Infrastructure Project Summary

Project ID	Year	Priority	Growth Benefit	Levied Project Cost
WW1	2023	1	90%	\$1,646,105
WW2	2028	1	90%	\$4,345,960
WW3	2038	1	100%	\$8,046,493
WW4	2028	1	50%	\$1,157,212
WW5	2022	1A	50%	\$3,714,771

5.4.2 Wastewater Infrastructure Rates

Based on the wastewater infrastructure upgrade projects and costs outlined above, the levy rates for the wastewater infrastructure are summarized in Table 5.5.

Table 5.5 Wastewater Infrastructure Levy Rate Summary

Priority	Benefiting Area	Area	Total Levied	Off-Site Levy
		ha		\$/ha
1	Global	274.73	\$15,195,770	\$55,313
1A	Global	274.73	\$3,714,771	\$13,522
Total		274.73	\$18,910,541	\$68,834

5.5 Transportation Infrastructure

5.5.1 Transportation Infrastructure Projects

In order to facilitate Coaldale’s anticipated growth, the following are recommended transportation projects to be included in the Off-Site Levy Bylaw. The locations of each levied upgrade are shown on Figure 5.4 and summarized in Table 5.6 below. Details for each project are provided in the project sheets in Appendix C.

Table 5.6 Transportation Infrastructure Project Summary

Project ID	Year	Priority	Growth Benefit	Levied Project Cost
T1	2032	1	50%	\$438,829
T2	2025	1	50%	\$576,798
T3	2024	1	75%	\$867,268
T4	2028	1A	75%	\$3,860,463
T5	2038	1B	50%	\$409,458
T6	2032	1B	50%	\$413,308
T7	2025	1B	50%	\$216,381
T8	2032	1B	75%	\$8,672,948
T9	2043	1B	75%	\$2,945,090

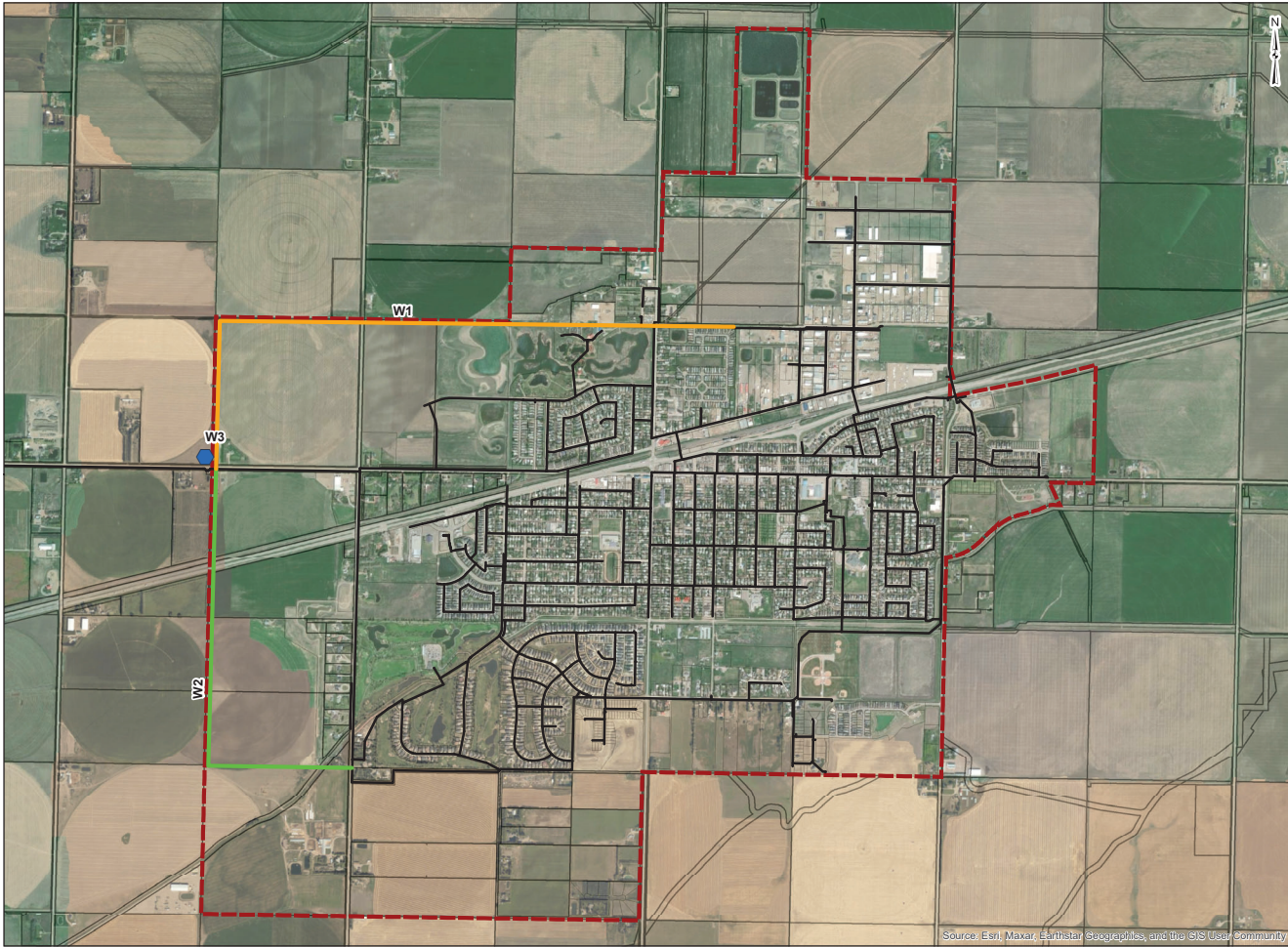







5.5.2 Transportation Infrastructure Rates

Based on the transportation infrastructure upgrade projects and costs outlined above, the levy rates for the transportation infrastructure are summarized in Table 5.7.

Table 5.7 Transportation Infrastructure Levy Rate Summary

Priority	Benefiting Area	Area	Total Levied	Off-Site Levy
		ha		\$/ha
1	Global	274.73	\$1,882,895	\$6,854
1A	Global	274.73	\$3,860,463	\$14,052
1B	Global	274.73	\$12,657,186	\$46,072
Total		274.73	\$18,400,544	\$66,978



- Legend**
-  West Reservoir and Pump Station
 - Proposed Water Main Improvements**
 -  North Main Loop (300mm)
 -  South Main Loop (300mm)
 -  Existing Watermain
 -  Town Boundary

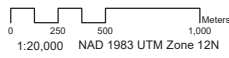
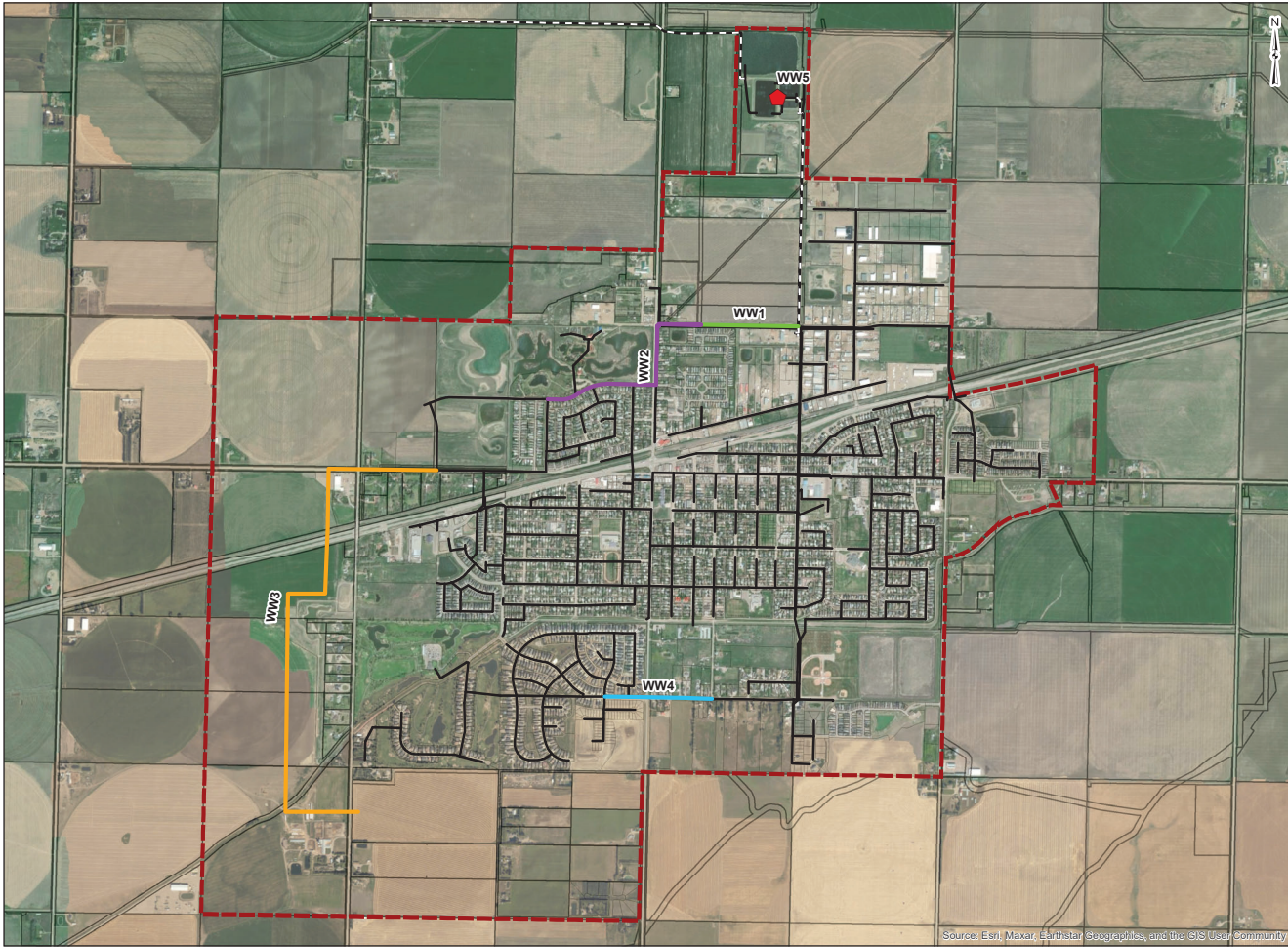


FIGURE 5.1
 WATER INFRASTRUCTURE PROJECTS
 TOWN OF COALDALE
 OFF-SITE LEVY REVIEW

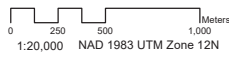


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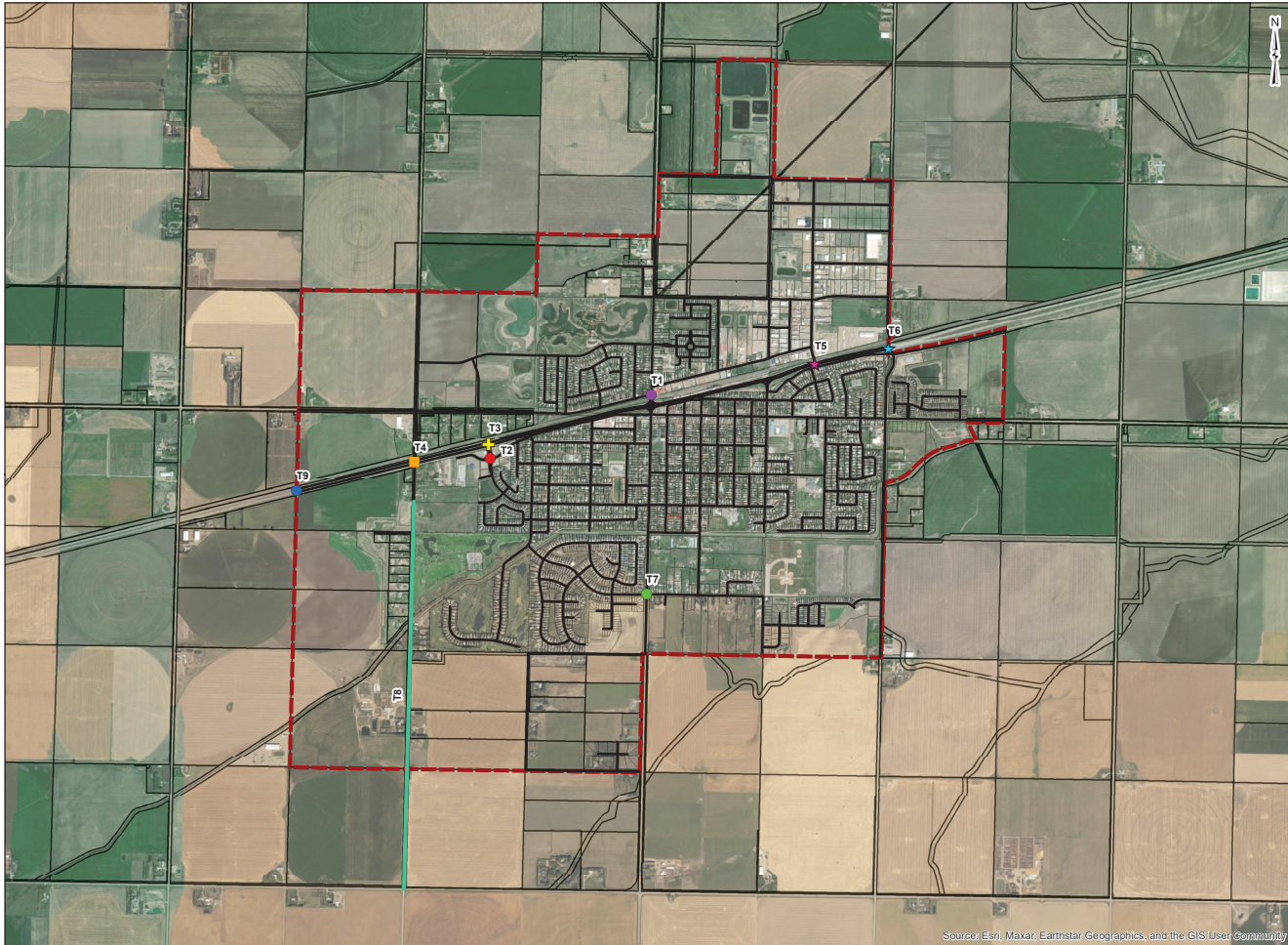
- ◆ Lagoon and Lift Station Capacity Upgrades
- Proposed Sanitary Sewer Improvements**
- West Main Trunk - Phase 1 (750mm)
- West Main Trunk - Phase 2 (750mm)
- West Main Trunk - Phase 3 (450/600mm)
- 30 Avenue Upgrade (375mm)
- Existing Sanitary Sewer
- Existing Forcemain
- Town Boundary



**FIGURE 5.2
WASTEWATER INFRASTRUCTURE
PROJECTS
TOWN OF COALDALE
OFF-SITE LEVY REVIEW**



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Legend

- Proposed Road Improvements**
- 18 Avenue/20 Street Intersection Upgrades
 - 21 Avenue/Land O'Lakes Drive Intersection Upgrades
 - 30 Avenue/20 Street Intersection Upgrades
 - New West Coaldale Highway 3 Intersection
 - Highway 3/30 Street Geometric Improvements
 - ★ Highway 3/11 Street Signalization
 - ★ Highway 3/8 Street Signalization
 - ⊕ Land O'Lakes Drive At-Grade Pedestrian Crossing
 - 30 Street Urbanization to Highway 512
 - Existing Road
 - ⬡ Town Boundary

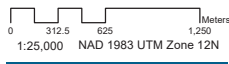


FIGURE 5.3
TRANSPORTATION INFRASTRUCTURE
PROJECTS
TOWN OF COALDALE
OFF-SITE LEVY REVIEW

Source: Esri, Maxar, Earthstar Geographics, and the GIS User Community



6.0 Off-Site Levy Summary

6.1 Off-Site Levy Rates

Off-site levy rates may be evaluated using either uniform or benefiting area rates; however, the Town has elected to maintain uniform rates for all types of infrastructure as outlined above. A summary of the off-site levy rates is provided in Table 6.1 and full detail of the rates is outlined in Appendix E.

6.1.1 Off-Site Levy Rate Comparison

Table 6.2 provides a comparison of the proposed rates outlined above for the Town of Coaldale with those of neighbouring municipalities.



Table 6.1 Off-Site Levy Rate Summary

Infrastructure	Current Levies		Proposed Levies					Change in Levies	
	Inside Town Boundary ¹	Outside Town Boundary ¹	Priority 1	Priority 1A	Priority 1B	Combined	Combined Minus Existing Balances	Inside Town Boundary	Outside Town Boundary
	\$/ha	\$/ha	\$/ha	\$/ha	\$/ha	\$/ha	\$/ha	\$/ha	\$/ha
Water	\$12,267	\$12,486	\$53,041	\$0	\$0	\$53,041	\$50,253	\$37,986	\$37,767
Wastewater	\$26,263	\$6,309	\$55,313	\$13,522	\$0	\$68,834	\$68,834	\$42,571	\$62,525
Stormwater	\$21,136	\$5,534	\$0	\$0	\$0	\$0	\$0	-\$21,136	-\$5,534
Transportation	\$35,163	\$35,641	\$6,854	\$14,052	\$46,072	\$66,978	\$65,679	\$30,516	\$30,038
Facilities	-	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total		\$85,575²	\$115,207	\$27,574	\$46,072	\$188,853	\$184,765		\$99,190³

¹ These off-site levy rates are based on the Off-Site Levy and Development Charges Review (MPE, 2007).

² This off-site levy rate is not the sum of the rates outlined above for each infrastructure type from Off-Site Levy and Development Charges Review (MPE, 2007), but the off-site levy rate outlined in the Off-Site Levy Bylaw (Coaldale, 2007).

³ This change in off-site levy rate is not the sum of the change in rates outlined above for each infrastructure type from Off-Site Levy and Development Charges Review (MPE, 2007), but the off-site levy rate outlined in the Off-Site Levy Bylaw (Coaldale, 2007).



Table 6.2 Summary of Neighbouring Municipalities for Off-Site Levy Rate Comparison

Municipality	Year ¹		Rate Type	Developable Area Considered	Infrastructure Inclusion					Off-Site Levies per Hectare	
	Bylaw	Rate			Water	Wastewater	Stormwater	Transportation	Facilities	Minimum	Maximum
Coaldale	-	2023	Uniform	Net	●	●		●		\$184,765	
Brooks	2007	2007	Benefiting Area	Net	●	●	●	●		\$15,803	\$60,252
Calgary	2019	2022	Benefiting Area	Net	●	●	●	●	●	\$490,527	\$540,755
Coalhurst	2013	2017	Uniform	Not Specified	●	●	●	●		\$126,000	
High River	2020	2022	Benefiting Area	Net	●	●	●	●	●	\$144,719	\$258,334
Lethbridge	2022	2023	Uniform	Net	●	●	●	●		\$290,000	
Medicine Hat	2019	2019	Benefiting Area	Net	●	●	●	●		\$139,557	\$407,359
Nanton	2010	2012	Uniform	Not Specified	●	●				\$85,030	
Okotoks	2020	2022	Uniform	Gross	●	●		●		\$202,580	
Taber	2016	2016	Uniform	Net	●	●				\$74,162	

¹ Bylaw year refers to the year in which the most recent amendment to the bylaw was completed. The rate year refers to the year that the rate applies to when various rates are identified and dependent on the year of application.

6.2 Timing of Off-Site Levy Collection

6.2.1 Current Off-Site Levy Bylaw

The current payment policy outlined in the Town’s Off-Site Levy Bylaw is quoted as follows: “...50% payable upon signing of a Development Agreement; and, 50% payable four (4) months after signing of a Development Agreement” and “no development shall proceed until payment of the levy...above is paid in full”.

6.2.2 Off-Site Levy Bylaws of Neighbouring Municipalities

During the review of the neighbouring municipalities, the timing of the off-site levy collection was noted and is summarized in Table 6.3.

Table 6.3 Summary of Payment Timing Policies for Neighbouring Municipalities

Municipality	Off-Site Levy Collection Timing
Brooks	Insufficient information.
Calgary	“...30% within one year of the date of execution of Interim Indemnity Agreement, 30% within two years of the date of execution of an Interim Indemnity Agreement, and the remaining 40% within three years of the date of execution of an Interim Indemnity Agreement” or “on or before the release of the development completion permit.”
Coalhurst	“50% of the Levy is payable upon signing of the Development Agreement. The remaining 50% shall be paid by December 31 of the same calendar year.”
Fort Macleod	“Unless otherwise agreed upon, the Off-Site Levy is due prior to the issuance of Subdivision approval for the Development Region or the issuance of a Development Permit in relation to the subject parcel.”
High River	“...10% paid prior to the execution of the Development Agreement or release of the development permit; 45% paid within one year of the execution of the Development Agreement or release of the Development Permit; and 45% paid within two years of execution of the Development Agreement or release of the Development Permit.”
Lethbridge	“50% of the assessed fees will be paid prior to the start of construction upon execution of the service agreement and 50% will be paid prior to the first building permit being issued within the development phase.”
Medicine Hat	“...imposed on a subdivision area by subdivision approval, the levies shall be paid at the...date of plan endorsement” or “where levies are imposed on a development area by the issuance of a development permit...shall be paid on the date of issuance of the development permit.”
Okotoks	“...if the subdivision plan area is less than 0.5 ha upon execution of a subdivision servicing agreement or, if no subdivision servicing agreement is to be executed, prior to endorsement of the plan of subdivision; or if the subdivision plan is 0.5 ha or greater: 50%...paid upon execution of a subdivision servicing agreement; and 50%...paid on or before the on-year anniversary of execution of the subdivision servicing agreement” or “in respect of land that is subject to development shall be paid in full prior to release of the development permit.”



Municipality	Off-Site Levy Collection Timing
Taber	“...shall enter into a Development Agreement with the Municipality and such Development Agreement shall ensure that: provision be made for the payment of Off-Site Levies as specified in this Bylaw, or that provision may be made for the deferring of payment of the Off-Site Levies to a future time certain or uncertain; and no further Off-Site Levies shall be required to be paid under Development Agreements that have been previously collected in full in respect to all of the lands which are the subject of the Development or Subdivision application.”

As outlined in Table 6.1, the Town’s current payment is comparable to those of surrounding municipalities. The off-site levy collection and timing policy may be outlined in either the Off-Site Levy Bylaw or in the Terms of the Agreement for the Development or Subdivision or subsequent agreements; this is the Town’s decision.

7.0 Conclusions and Recommendations

7.1 Conclusions

The Town's off-site levies will be charged to any new or incremental development in the Town that will impact the need for upgrades in infrastructure, including the following:

- Water supply and distribution infrastructure
- Wastewater sewer collection and treatment infrastructure
- Transportation infrastructure

Additional assumptions pertaining to the infrastructure projects and the proportions of costs carried in the off-site levy rate calculations for each infrastructure type are outlined in the following sections.

General assumptions are as follows:

- Off-site levy rates can be broken down using uniform or benefiting area rate methodology.
- Potential grant funding of infrastructure is not included in this report.
- No interest or carrying charges have been included at this stage.
- Details of potential endeavours to assist will be detailed by the Town in the formal off-site levy policy and/or future development agreements.
- Off-site levy rates are based on net development area as noted above.
- Projects are considered to benefit future development only or shared between future development and the existing population.
- All projects are considered to provide global benefit to the Town. Therefore, levy rates were calculated on a uniform basis.
- Cost estimates are based on the supporting planning documents as well as Town project budgets and estimates with an inflation factor applied to account for the increased cost of the project in the proposed construction year.
- Project timelines are based on the Town's proposed project construction/implementation years.
- Residual benefit of the infrastructure projects for the existing population were provided by the Town and vary depending on type of infrastructure and specific project.

The current payment and timing policy, as specified in the existing bylaw, requires that the levies be paid based on the following: "...50% payable upon signing of a Development Agreement; and, 50% payable four (4) months after signing of a Development Agreement" and "no development shall proceed until payment of the levy...above is paid in full". Comparing this payment and timing policy to the surrounding municipalities, the Town is consistent with other municipalities.



7.2 Recommendations

Recommendations related to the Town's off-site levy update are as follows:

- The Town should consider implementing those rates contained herein; however, the Town may choose to set lower rates to be competitive with other municipalities.
- The Town may wish to consider lower levy rates for non-residential development, given its typically positive implications on the municipal tax base.
- The Town should consider the suitability of the recommended rates for its purposes.
- The Town should determine which timing methodology to utilize in the Off-Site Levy Bylaw.
- The Town should review the off-site levy rates once a year to update the associated infrastructure project assumptions, costing, and timelines. This review is to support annual reporting requirements outlined in the MGA, which include details regarding levies collected and spent, and must be made publicly available (Brownlee LLP, 2019).
- The Town should complete a detailed review of the Off-Site Levy Bylaw every three to five years (Brownlee LLP, 2019).

8.0 References

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APPENDIX
Water Project Sheets

A

Project W1: North Coaldale Loop

Project Timeline: 2032

Priority: 1

Project Description

This project includes approximately 3,590 m of 300 mm watermain from 16 Street to 18 Avenue along 14 Avenue and the town boundary.

Reference Documents

- Infrastructure Master Plan (MPE, 2019)

Benefitting Areas

All water infrastructure projects have been assumed to provide a global benefit to the Town's 25-year growth horizon area of approximately 275 ha.

Assumptions and Rationale

This project is required to facilitate development; however, it does provide residual benefit to the existing town. Therefore, 75% of the project capital cost has been levied.

Project Costs

Item	Cost
Estimated Construction Cost ¹	\$3,697,626
Grant Funded	-
Developer Build Contribution	-
Town Contribution	\$924,407
Leviable Project Cost	\$2,773,220
Off-Site Levies Collected to 2022	-
Remaining Levy	\$2,773,220

¹ The project construction cost includes contingency and engineering costs and has been inflated based on the proposed construction year of the project.

Off-Site Levy Rates

Item	Cost
	\$/ha
2022 Levy Rate	\$10,095



Project W2: South Coaldale Loop

Project Timeline: 2038

Priority: 1

Project Description

This project includes approximately 2,390 m of 300 mm watermain from 30 Street to 18 Avenue along Township Road 91 and the town boundary.

Reference Documents

- Infrastructure Master Plan (MPE, 2019)

Benefitting Areas

All water infrastructure projects have been assumed to provide a global benefit to the Town's 25-year growth horizon area of approximately 275 ha.

Assumptions and Rationale

This project is required to facilitate development; however, it does provide residual benefit to the existing town. Therefore, 75% of the project capital cost has been levied.

Project Costs

Item	Cost
Estimated Construction Cost ¹	\$2,984,362
Grant Funded	-
Developer Build Contribution	-
Town Contribution	\$746,091
Leviable Project Cost	\$2,238,272
Off-Site Levies Collected to 2022	-
Remaining Levy	\$2,238,272

¹ The project construction cost includes contingency and engineering costs and has been inflated based on the proposed construction year of the project.

Off-Site Levy Rates

Item	Cost
	\$/ha
2022 Levy Rate	\$8,147

Project W3: West Reservoir and Pump Station

Project Timeline: 2028

Priority: 1

Project Description

This project includes a new reservoir and pump station along 18 Avenue at the west town boundary.

Reference Documents

- Infrastructure Master Plan (MPE, 2019)
- Treated Reservoir and Pump Station Project Scoping Document (MPE, 2022)

Benefitting Areas

All water infrastructure projects have been assumed to provide a global benefit to the Town's 25-year growth horizon area of approximately 275 ha.

Assumptions and Rationale

This project is required to facilitate development; however, it does provide residual benefit to the existing town. Therefore, 75% of the project capital cost has been levied. The cost estimates outlined in the IMP have been supplemented with the Treated Water Reservoir and Pump Station Project Scoping Document (MPE, 2022).

Project Costs

Item	Cost
Estimated Construction Cost ¹	\$12,746,906
Grant Funded	-
Developer Build Contribution	-
Town Contribution	\$3,186,726
Leviable Project Cost	\$9,560,179
Off-Site Levies Collected to 2022	-
Remaining Levy	\$9,560,179

¹ The project construction cost includes contingency and engineering costs and has been inflated based on the proposed construction year of the project.

Off-Site Levy Rates

Item	Cost
	\$/ha
2022 Levy Rate	\$34,799



APPENDIX
Wastewater Project Sheets

B

Project WW1: West Coaldale Main Trunk – Phase 1

Project Timeline: 2023

Priority: 1

Project Description

This project includes approximately 480 m of 675 mm and 60 m of 750 mm wastewater main from 13 Street to Porter Street along 14 Avenue.

Reference Documents

- Infrastructure Master Plan (MPE, 2019)
- West Coaldale Trunk Main Preliminary Design Study (MPE, 2022)

Benefitting Areas

All water infrastructure projects have been assumed to provide a global benefit to the Town's 25-year growth horizon area of approximately 275 ha.

Assumptions and Rationale

This project is required to facilitate development; however, it does provide residual benefit to the existing town. Therefore, 90% of the project capital cost has been levied. The cost estimates outlined in the IMP have been supplemented with the West Coaldale Trunk Main Preliminary Design Study (MPE, 2022) for this project.

Project Costs

Item	Cost
Estimated Construction Cost ¹	\$1,829,005
Grant Funded	-
Developer Build Contribution	-
Town Contribution	\$182,901
Leviable Project Cost	\$1,646,105
Off-Site Levies Collected to 2022	-
Remaining Levy	\$1,646,105

¹ The project construction cost includes contingency and engineering costs and has been inflated based on the proposed construction year of the project.

Off-Site Levy Rates

Item	Cost
	\$/ha
2022 Levy Rate	\$5,992



Project WW2: West Coaldale Main Trunk – Phase 2

Project Timeline: 2028

Priority: 1

Project Description

This project includes approximately 1,200 m of 600 mm wastewater main from Porter Street to 23 Street along 14 Avenue, 20 Street, and 16 Avenue.

Reference Documents

- Infrastructure Master Plan (MPE, 2019)
- West Coaldale Trunk Main Preliminary Design Study (MPE, 2022)

Benefitting Areas

All water infrastructure projects have been assumed to provide a global benefit to the Town’s 25-year growth horizon area of approximately 275 ha.

Assumptions and Rationale

This project is required to facilitate development; however, it does provide residual benefit to the existing town. Therefore, 90% of the project capital cost has been levied. The cost estimates outlined in the IMP have been supplemented with the West Coaldale Trunk Main Preliminary Design Study (MPE, 2022) for this project.

Project Costs

Item	Cost
Estimated Construction Cost ¹	\$4,828,845
Grant Funded	-
Developer Build Contribution	-
Town Contribution	\$482,884
Leviable Project Cost	\$4,345,960
Off-Site Levies Collected to 2022	-
Remaining Levy	\$4,345,960

¹ The project construction cost includes contingency and engineering costs and has been inflated based on the proposed construction year of the project.

Off-Site Levy Rates

Item	Cost
	\$/ha
2022 Levy Rate	\$15,819

Project WW3: West Coaldale Main Trunk – Phase 3

Project Timeline: 2038

Priority: 1

Project Description

This project includes approximately 600 m of 300 mm, 1,935 m of 375 mm, and 260 m of 600 mm wastewater main from 26 Street along 18 Avenue and west of 30 Street.

Reference Documents

- Infrastructure Master Plan (MPE, 2019)
- West Coaldale Trunk Main Preliminary Design Study (MPE, 2022)

Benefitting Areas

All water infrastructure projects have been assumed to provide a global benefit to the Town's 25-year growth horizon area of approximately 275 ha.

Assumptions and Rationale

This project is required to facilitate development; therefore, benefit has been allocated to the Town's growth area only. The cost estimates outlined in the IMP have been supplemented with the West Coaldale Trunk Main Preliminary Design Study (MPE, 2022) for this project.

Project Costs

Item	Cost
Estimated Construction Cost ¹	\$8,046,493
Grant Funded	-
Developer Build Contribution	-
Town Contribution	-
Leviable Project Cost	\$8,046,493
Off-Site Levies Collected to 2022	-
Remaining Levy	\$8,046,493

¹ The project construction cost includes contingency and engineering costs and has been inflated based on the proposed construction year of the project.

Off-Site Levy Rates

Item	Cost
	\$/ha
2022 Levy Rate	\$29,289

Project WW4: 30 Avenue Upgrade

Project Timeline: 2028

Priority: 1

Project Description

This project includes approximately 580 m of 375 mm wastewater main upgrade from Elm Drive to 17 Street along Cottonwood Drive/30 Avenue.

Reference Documents

- Infrastructure Master Plan (MPE, 2019)

Benefitting Areas

All water infrastructure projects have been assumed to provide a global benefit to the Town's 25-year growth horizon area of approximately 275 ha.

Assumptions and Rationale

This project is required to facilitate development; however, it does provide residual benefit to the existing town. Therefore, 50% of the project capital cost has been levied.

Project Costs

Item	Cost
Estimated Construction Cost ¹	\$2,314,424
Grant Funded	-
Developer Build Contribution	-
Town Contribution	\$1,157,212
Leviable Project Cost	\$1,157,212
Off-Site Levies Collected to 2022	-
Remaining Levy	\$1,157,212

¹ The project construction cost includes contingency and engineering costs and has been inflated based on the proposed construction year of the project.

Off-Site Levy Rates

Item	Cost
	\$/ha
2022 Levy Rate	\$4,212

Project WW5: Lagoon and Lift Station Capacity Upgrades

Project Timeline: 2022

Priority: 1A

Project Description

This project includes capacity and treatment upgrades at the existing lagoon and lift station site.

Reference Documents

- Infrastructure Master Plan (MPE, 2019)

Benefitting Areas

All water infrastructure projects have been assumed to provide a global benefit to the Town's 25-year growth horizon area of approximately 275 ha.

Assumptions and Rationale

This project is required to facilitate development; however, it does provide residual benefit to the existing town. Therefore, 50% of the project capital cost has been levied. The cost estimates outlined in the IMP have been supplemented with tendered costs for this project. It should be noted that \$645,000 of previously collected levies was already spent on this project; therefore, this was removed from the total for the levy rate calculation.

Project Costs

Item	Cost
Estimated Construction Cost ¹	\$12,466,178
Grant Funded	\$4,391,636
Developer Build Contribution	-
Town Contribution	\$3,714,771
Leviable Project Cost	\$3,714,771
Off-Site Levies Collected to 2022	-
Remaining Levy	\$3,714,771

¹ The project construction cost includes contingency and engineering costs and has been inflated based on the proposed construction year of the project.

Off-Site Levy Rates

Item	Cost
	\$/ha
2022 Levy Rate	\$13,522



APPENDIX
Transportation Project Sheets

C

Project T1: 18 Avenue/20 Street Intersection Upgrades

Project Timeline: 2032

Priority: 1

Project Description

This project includes upgrades to the intersection of 18 Avenue and 20 Street (Highway 845).

Reference Documents

- Town of Coaldale Transportation Master Plan (WATT, 2020)
- Coaldale Industrial ASP TIA (ISL, 2022)

Benefitting Areas

All transportation infrastructure projects have been assumed to provide a global benefit to the Town's 25-year growth horizon area of approximately 275 ha.

Assumptions and Rationale

This project is required to facilitate development; however, it does provide residual benefit to the existing town. Therefore, 50% of the project capital cost has been levied. It is likely that the TMP cost was underestimated; therefore, it is recommended that these costs be reviewed.

Project Costs

Item	Cost
Estimated Construction Cost ¹	\$877,657
Grant Funded	-
Developer Build Contribution	-
Town Contribution	\$438,829
Leviable Project Cost	\$438,829
Off-Site Levies Collected to 2022	-
Remaining Levy	\$438,829

¹ The project construction cost includes contingency and engineering costs and has been inflated based on the proposed construction year of the project.

Off-Site Levy Rates

Item	Cost
	\$/ha
2022 Levy Rate	\$1,597



Project T2: 21 Avenue/Land O'Lakes Drive Intersection Upgrades

Project Timeline: 2025

Priority: 1

Project Description

This project includes upgrades to the intersection of 21 Avenue and Land O'Lakes Drive in the form of a roundabout.

Reference Documents

- Town of Coaldale Transportation Master Plan (WATT, 2020)
- Opinion of Probable Cost – Single Lane Roundabout (Stage 1) (ISL, 2020)

Benefitting Areas

All transportation infrastructure projects have been assumed to provide a global benefit to the Town's 25-year growth horizon area of approximately 275 ha.

Assumptions and Rationale

This project is required to facilitate development; however, it does provide residual benefit to the existing town. Therefore, 50% of the project capital cost has been levied. The cost estimates outlined in the TMP have been supplemented with the Opinion of Probable Cost – Single Lane Roundabout (Stage 1) (ISL, 2020) estimates for this project.

Project Costs

Item	Cost
Estimated Construction Cost ¹	\$1,153,596
Grant Funded	-
Developer Build Contribution	-
Town Contribution	\$576,798
Leviable Project Cost	\$576,798
Off-Site Levies Collected to 2022	-
Remaining Levy	\$576,798

¹ The project construction cost includes contingency and engineering costs and has been inflated based on the proposed construction year of the project.

Off-Site Levy Rates

Item	Cost
	\$/ha
2022 Levy Rate	\$2,100

Project T3: Land O'Lakes Drive At-Grade Pedestrian Crossing

Project Timeline: 2024

Priority: 1

Project Description

This project includes an at-grade pedestrian crossing of Highway 3 at Land O'Lakes Drive.

Reference Documents

- Town of Coaldale Transportation Master Plan (WATT, 2020)
- West Coaldale Transportation and Connectivity Study (MPE, 2022)

Benefitting Areas

All transportation infrastructure projects have been assumed to provide a global benefit to the Town's 25-year growth horizon area of approximately 275 ha.

Assumptions and Rationale

This project is required to facilitate development; however, it does provide residual benefit to the existing town. Therefore, 75% of the project capital cost has been levied. The cost estimates for this project have been based on the West Coaldale Transportation and Connectivity Study (MPE, 2022) estimates.

Project Costs

Item	Cost
Estimated Construction Cost ¹	\$1,156,358
Grant Funded	-
Developer Build Contribution	-
Town Contribution	\$289,089
Leviable Project Cost	\$867,268
Off-Site Levies Collected to 2022	-
Remaining Levy	\$867,268

¹ The project construction cost includes contingency and engineering costs and has been inflated based on the proposed construction year of the project.

Off-Site Levy Rates

Item	Cost
	\$/ha
2022 Levy Rate	\$3,157

Project T4: Highway 3/30 Street Geometric Improvements

Project Timeline: 2028

Priority: 1A

Project Description

This project includes geometric improvements at the intersection of Highway 3 and 30 Street. Signalization at the intersection was completed in 2021.

Reference Documents

- Town of Coaldale Transportation Master Plan (WATT, 2020)
- Town of Coaldale – Highway 3 and 30 Street Traffic Impact Assessment (MPE, 2020)
- Southwest Coaldale Area Structure Plan – Traffic Analysis (WATT, 2022)
- Order of Magnitude Cost Estimate (MPE, 2023)

Benefitting Areas

All transportation infrastructure projects have been assumed to provide a global benefit to the Town's 25-year growth horizon area of approximately 275 ha.

Assumptions and Rationale

This project is required to facilitate development; however, it does provide residual benefit to the existing town. Therefore, 75% of the project capital cost has been levied. The cost estimates outlined in the TMP have been supplemented by the Order of Magnitude Cost Estimate (MPE, 2023). These cost estimates are to be updated when more detailed cost estimates become available.

Project Costs

Item	Cost
Estimated Construction Cost ¹	\$5,147,284
Grant Funded	-
Developer Build Contribution	-
Town Contribution	\$1,286,821
Leviable Project Cost	\$3,860,463
Off-Site Levies Collected to 2022	-
Remaining Levy	\$3,860,463

¹ The project construction cost includes contingency and engineering costs and has been inflated based on the proposed construction year of the project.

Off-Site Levy Rates

Item	Cost
	\$/ha
2022 Levy Rate	\$14,052

Project T5: Highway 3/11 Street Signalization

Project Timeline: 2038

Priority: 1B

Project Description

This project includes an upgrade to the intersection of Highway 3 and 11 Street through signalization of the intersection.

Reference Documents

- Town of Coaldale Transportation Master Plan (WATT, 2020)
- Coaldale Industrial ASP TIA (ISL, 2022)
- Highway 3 and 11th Street Signalization Order of Magnitude Cost Estimate (Coaldale, 2023)

Benefitting Areas

All transportation infrastructure projects have been assumed to provide a global benefit to the Town's 25-year growth horizon area of approximately 275 ha.

Assumptions and Rationale

This project is required to facilitate development; however, it does provide residual benefit to the existing town. Therefore, 50% of the project capital cost has been levied. The cost estimates outlined in the TMP have been supplemented by the Highway 3 and 11th Street Signalization Order of Magnitude Cost Estimate (Coaldale, 2023). These cost estimates are to be updated when more detailed cost estimates become available.

Project Costs

Item	Cost
Estimated Construction Cost ¹	\$818,916
Grant Funded	-
Developer Build Contribution	-
Town Contribution	\$409,458
Leviable Project Cost	\$409,458
Off-Site Levies Collected to 2022	-
Remaining Levy	\$409,458

¹ The project construction cost includes contingency and engineering costs and has been inflated based on the proposed construction year of the project.

Off-Site Levy Rates

Item	Cost
	\$/ha
2022 Levy Rate	\$1,490



Project T6: Highway 3/8 Street Signalization

Project Timeline: 2032

Priority: 1B

Project Description

This project includes an upgrade to the intersection of Highway 3 and 8 Street through signalization of the intersection.

Reference Documents

- Town of Coaldale Transportation Master Plan (WATT, 2020)
- Coaldale Industrial ASP TIA (ISL, 2022)
- Highway 3 and 8th Street Signalization Order of Magnitude Cost Estimate (Coaldale, 2023)

Benefitting Areas

All transportation infrastructure projects have been assumed to provide a global benefit to the Town's 25-year growth horizon area of approximately 275 ha.

Assumptions and Rationale

This project is required to facilitate development; however, it does provide residual benefit to the existing town. Therefore, 50% of the project capital cost has been levied. The cost estimates outlined in the TMP have been supplemented by the Highway 3 and 8th Street Signalization Order of Magnitude Cost Estimate (Coaldale, 2023). These cost estimates are to be updated when more detailed cost estimates become available.

Project Costs

Item	Cost
Estimated Construction Cost ¹	\$826,617
Grant Funded	-
Developer Build Contribution	-
Town Contribution	\$413,308
Leviable Project Cost	\$413,308
Off-Site Levies Collected to 2022	-
Remaining Levy	\$413,308

¹ The project construction cost includes contingency and engineering costs and has been inflated based on the proposed construction year of the project.

Off-Site Levy Rates

Item	Cost
	\$/ha
2022 Levy Rate	\$1,504

Project T7: 30 Avenue/20 Street Intersection Upgrades

Project Timeline: 2025

Priority: 1B

Project Description

This project includes an upgrade to the intersection of 30 Avenue and 20 Street through signalization of the intersection.

Reference Documents

- Town of Coaldale Transportation Master Plan (WATT, 2020)
- Cottonwood Estates Transportation Impact Assessment (WATT, 2019)
- South Coaldale Transportation Impact Assessment (WATT, 2021)

Benefitting Areas

All transportation infrastructure projects have been assumed to provide a global benefit to the Town's 25-year growth horizon area of approximately 275 ha.

Assumptions and Rationale

This project is required to facilitate development; however, it does provide residual benefit to the existing town. Therefore, 50% of the project capital cost has been levied. The cost estimates for this project are based on the 30th Avenue and 20th Street Intersection Upgrades Preliminary Cost Estimate (Coaldale, 2022) as provided by the Town. These cost estimates are to be updated when more detailed cost estimates become available.

Project Costs

Item	Cost
Estimated Construction Cost ¹	\$432,763
Grant Funded	-
Developer Build Contribution	-
Town Contribution	\$216,381
Leviable Project Cost	\$216,381
Off-Site Levies Collected to 2022	-
Remaining Levy	\$216,381

¹ The project construction cost includes contingency and engineering costs and has been inflated based on the proposed construction year of the project.

Off-Site Levy Rates

Item	Cost
	\$/ha
2022 Levy Rate	\$788

Project T8: 30 Street Urbanization to Highway 512

Project Timeline: 2032

Priority: 1B

Project Description

This project includes an upgrade of 30 Street from 23 Avenue to Highway 512 through urbanization of approximately 2.5 km of 30 Street.

Reference Documents

- Town of Coaldale Transportation Master Plan (WATT, 2020)
- Southwest Coaldale Area Structure Plan – Traffic Analysis (WATT, 2022)
- Order of Magnitude Cost Estimate (MPE, 2023)

Benefitting Areas

All transportation infrastructure projects have been assumed to provide a global benefit to the Town's 25-year growth horizon area of approximately 275 ha.

Assumptions and Rationale

This project is required to facilitate development; however, it does provide residual benefit to the existing town. Therefore, 75% of the project capital cost has been levied. The cost estimates outlined in the TMP have been supplemented by the Order of Magnitude Cost Estimate (MPE, 2023). These cost estimates are to be updated when more detailed cost estimates become available.

Project Costs

Item	Cost
Estimated Construction Cost ¹	\$11,563,931
Grant Funded	-
Developer Build Contribution	-
Town Contribution	\$2,890,983
Leviable Project Cost	\$8,672,948
Off-Site Levies Collected to 2022	-
Remaining Levy	\$8,672,948

¹ The project construction cost includes contingency and engineering costs and has been inflated based on the proposed construction year of the project.

Off-Site Levy Rates

Item	Cost
	\$/ha
2022 Levy Rate	\$31,570

Project T9: New West Coaldale Highway 3 Intersection

Project Timeline: 2043

Priority: 1B

Project Description

This project includes a new intersection at Highway 3 and the Town's west boundary.

Reference Documents

- Town of Coaldale Transportation Master Plan (WATT, 2020)
- Southwest Coaldale Area Structure Plan – Traffic Analysis (WATT, 2022)
- Order of Magnitude Cost Estimate (MPE, 2023)

Benefitting Areas

All transportation infrastructure projects have been assumed to provide a global benefit to the Town's 25-year growth horizon area of approximately 275 ha.

Assumptions and Rationale

This project is required to facilitate development; however, it does provide residual benefit to the existing town. Therefore, 75% of the project capital cost has been levied. The cost estimates outlined in the TMP have been supplemented by the Order of Magnitude Cost Estimate (MPE, 2023). These cost estimates are to be updated when more detailed cost estimates become available.

Project Costs

Item	Cost
Estimated Construction Cost ¹	\$3,926,787
Grant Funded	-
Developer Build Contribution	-
Town Contribution	\$981,697
Leviable Project Cost	\$2,945,090
Off-Site Levies Collected to 2022	-
Remaining Levy	\$2,945,090

¹ The project construction cost includes contingency and engineering costs and has been inflated based on the proposed construction year of the project.

Off-Site Levy Rates

Item	Cost
	\$/ha
2022 Levy Rate	\$10,720



APPENDIX
Detailed Off-Site Levy Calculations

D



Table D1: Current Levy Rate Summary

Infrastructure Upgrade	Current Levies	
	Inside Town Boundary	Outside Town Boundary
	\$/ha	\$/ha
Water	\$12,267	\$12,486
Wastewater	\$26,263	\$6,309
Stormwater	\$21,136	\$5,534
Transportation	\$35,163	\$35,641
Facilities	\$0	\$0
Total	\$94,829	\$59,970
Total Bylaw	\$85,575	

Note: The total bylaw is based on the levy rate imposed as of May 1, 2009 in the Off-Site Levy Bylaw (Coaldale, 2008)

Table D2: Existing Levy Account Balances

Infrastructure Upgrade	Existing Off-Site Levy Account Balance	
	\$	\$/ha
Water	\$766,000	\$2,788
Wastewater	\$114	\$0
Stormwater	\$568,000	\$2,068
Transportation	\$357,000	\$1,299
Facilities	\$0	\$0
Total	\$1,691,114	\$6,156

Note: The per hectare total of the existing levy account balances is based on the net developable area of the 25-year horizon.

Table D3: Uniform Off-Site Levy Rate Summary - 25-Year Horizon - Net Area

Infrastructure Upgrade	Proposed Off-Site Levies				
	Priority 1	Priority 1A	Priority 1B	Combined	Combined Minus Existing Balances
	\$/ha	\$/ha	\$/ha	\$/ha	\$/ha
Water	\$53,041	\$0	\$0	\$53,041	\$50,253
Wastewater	\$55,313	\$13,522	\$0	\$68,834	\$68,834
Stormwater	\$0	\$0	\$0	\$0	\$0
Transportation	\$6,854	\$14,052	\$46,072	\$66,978	\$65,679
Facilities	\$0	\$0	\$0	\$0	\$0
Total	\$115,207	\$27,574	\$46,072	\$188,853	\$184,765

Table D4: Change in Off-Site Levy Rate

Infrastructure Upgrade	Change in Levies	
	Inside Town Boundary	Outside Town Boundary
	\$/ha	\$/ha
Water	\$37,986	\$37,767
Wastewater	\$42,571	\$62,525
Stormwater	-\$21,136	-\$5,534
Transportation	\$30,516	\$30,038
Facilities	\$0	\$0
Total	\$99,190	



Table D7: Transportation Off-Site Levy Calculations - 25-Year Horizon - Net Area

Priority	ID	Project	Description	Cost Estimate Year	Proposed Construction Year	Original Construction Cost	Contingency	Material Testing	Engineering	Capital Cost	Updated Capital Cost	Levies Spent	Remaining Capital Cost	Grant Funded	Developer Built/Financed	Existing Town Contribution	Total Levied	Uniform Model
	T1	18 Avenue/20 Street Intersection Upgrades	Upgrade	2020	2032	\$ 450,000	\$ 112,500	\$ 14,063	\$ 70,313	\$ 646,875	\$ 877,657	\$ -	\$ 877,657	\$ -	\$ -	\$ 438,829	\$ 438,829	\$ 438,829
	T2	21 Avenue/Land O Lakes Drive Intersection Upgrades	Upgrade	2020	2025	\$ 739,955	\$ 110,993	\$ 21,274	\$ 106,369	\$ 978,590	\$ 1,153,596	\$ -	\$ 1,153,596	\$ -	\$ -	\$ 576,798	\$ 576,798	\$ 576,798
	T3	Land O Lakes Drive At-Grade Pedestrian Crossing	New	2022	2024	\$ 810,200	\$ 162,040	\$ -	\$ 122,000	\$ 1,094,240	\$ 1,156,358	\$ -	\$ 1,156,358	\$ -	\$ -	\$ 289,089	\$ 867,269	\$ 867,269
Sub-Total Transportation Priority 1						\$ 2,000,155	\$ 385,533	\$ 35,336	\$ 238,681	\$ 2,715,705	\$ 3,107,611	\$ -	\$ 3,107,611	\$ -	\$ -	\$ 1,304,716	\$ 1,832,895	\$ 1,832,895
Sub-Total Transportation Priority 1 per Hectare						\$ 3,071,000	\$ 438,000	\$ -	\$ 336,000	\$ 3,845,000	\$ 5,147,284	\$ -	\$ 5,147,284	\$ -	\$ -	\$ 1,286,821	\$ 3,860,463	\$ 3,860,463
Sub-Total Transportation Priority 1A						\$ 3,071,000	\$ 438,000	\$ -	\$ 336,000	\$ 3,845,000	\$ 5,147,284	\$ -	\$ 5,147,284	\$ -	\$ -	\$ 1,286,821	\$ 3,860,463	\$ 3,860,463
Sub-Total Transportation Priority 1A per Hectare						\$ 3,071,000	\$ 438,000	\$ -	\$ 336,000	\$ 3,845,000	\$ 5,147,284	\$ -	\$ 5,147,284	\$ -	\$ -	\$ 1,286,821	\$ 3,860,463	\$ 3,860,463
	T5	Highway 3/11 Street Signalization	Upgrade	2022	2038	\$ 485,000	\$ 50,000	\$ -	\$ 50,000	\$ 585,000	\$ 818,916	\$ -	\$ 818,916	\$ -	\$ -	\$ 409,458	\$ 409,458	\$ 409,458
	T6	Highway 3/8 Street Signalization	Upgrade	2022	2032	\$ 550,000	\$ 55,000	\$ -	\$ 60,000	\$ 665,000	\$ 826,617	\$ -	\$ 826,617	\$ -	\$ -	\$ 413,308	\$ 413,308	\$ 413,308
	T7	30 Avenue/20 Street Intersection Upgrades	Upgrade	2022	2025	\$ 290,300	\$ 66,800	\$ 7,300	\$ 36,300	\$ 400,700	\$ 432,763	\$ -	\$ 432,763	\$ -	\$ -	\$ 216,381	\$ 216,381	\$ 216,381
	T8	30 Street Urbanization to Highway 512	Upgrade	2022	2032	\$ 7,069,000	\$ 1,039,000	\$ -	\$ 1,195,000	\$ 9,303,000	\$ 11,563,931	\$ -	\$ 11,563,931	\$ -	\$ -	\$ 2,850,983	\$ 8,672,948	\$ 8,672,948
	T9	New West Coaldale Highway 3 Intersection	Upgrade	2023	2043	\$ 2,126,000	\$ 296,000	\$ -	\$ 200,000	\$ 2,622,000	\$ 3,926,787	\$ -	\$ 3,926,787	\$ -	\$ -	\$ 981,697	\$ 2,945,090	\$ 2,945,090
Sub-Total Transportation Priority 1B						\$ 10,520,300	\$ 1,506,800	\$ 7,300	\$ 1,541,300	\$ 13,575,700	\$ 17,569,014	\$ -	\$ 17,569,014	\$ -	\$ -	\$ 4,911,827	\$ 12,657,186	\$ 12,657,186
Sub-Total Transportation Priority 1B per Hectare						\$ 15,591,455	\$ 2,330,333	\$ 42,636	\$ 2,175,981	\$ 20,140,405	\$ 25,903,908	\$ -	\$ 25,903,908	\$ -	\$ -	\$ 7,503,364	\$ 18,400,544	\$ 18,400,544
Total Transportation						\$ 15,591,455	\$ 2,330,333	\$ 42,636	\$ 2,175,981	\$ 20,140,405	\$ 25,903,908	\$ -	\$ 25,903,908	\$ -	\$ -	\$ 7,503,364	\$ 18,400,544	\$ 18,400,544
Total Transportation per Hectare						\$ 15,591,455	\$ 2,330,333	\$ 42,636	\$ 2,175,981	\$ 20,140,405	\$ 25,903,908	\$ -	\$ 25,903,908	\$ -	\$ -	\$ 7,503,364	\$ 18,400,544	\$ 18,400,544



APPENDIX
Off-Site Levy Fact Sheet

E

Town of Coaldale Off-Site Levy Fact Sheet

General Off-Site Levy Overview

What is the purpose of this Off-Site Levy Review?

- To ensure adequate capital is collected from new developments in the Town to fund infrastructure required to support Town growth. These costs should be financed through levies collected on the development within the Town.
- To update the existing levy rates and bylaw from the previous 2007 Off-Site Levy and Development Charges Review.



Why update the current Off-Site Levy Bylaw?

- Levy rates, as well as other issues such as timing, may impact a municipality's ability to attract and maintain developments.
- The Town annexed additional lands from Lethbridge County in 2018, increasing the available development area and services required to accommodate this development.
- A new Infrastructure Master Plan and Transportation Master Plan were completed in 2019 and 2020, respectively, to outline the infrastructure needs due to anticipated future growth.

What types of infrastructure can be included in an off-site levy?

The governing authority for the off-site levy bylaw is the Municipal Government Act (MGA), which states that the off-site levy may be used to pay for all or part of the capital cost of any or all of the following:



- New or expanded facilities for the storage, transmission, treatment or supplying of water;
- New or expanded facilities for the treatment, movement or disposal of wastewater;
- New or expanded storm sewer drainage facilities;
- New or expanded roads required for or impacted by a subdivision or development; and
- Land required for or in connection with any facilities described above.

As of January 1, 2018, an off-site levy may also be used to pay for the following:

- New or expanded community recreation facilities (i.e., parks, pools, arenas, etc.);
- New or expanded fire hall facilities;
- New or expanded police station facilities; and
- New or expanded libraries.

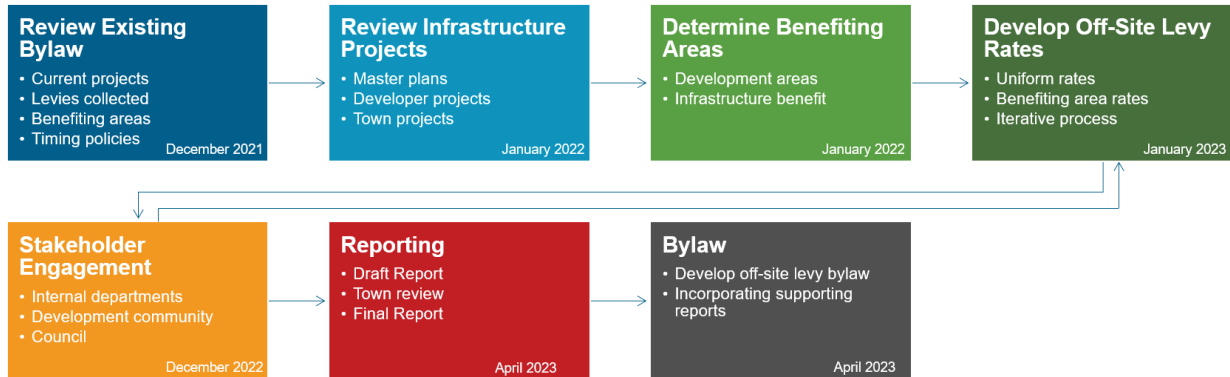


What are the benefits of off-site levies?

- Levies provide a standardized system (levy rates, payment timing, etc.) for developers to contribute to town infrastructure project needs to accommodate their development. This benefits both the existing town and new developments.
- The Town can better budget for upcoming infrastructure projects based on proposed development horizons, associated off-site levy rates and collections timelines, as well as debenture-based financing impacts to the Town.

Town of Coaldale Off-Site Levy Review

Off-Site Levy Review Methodology



Off-Site Levy Assumptions

- Water, wastewater, and transportation infrastructure projects are included. Stormwater and facility infrastructure projects were not included.
- All projects are considered to provide global benefit to the Town. Therefore, levy rates were calculated on a uniform basis and based on the net developable area.
- Projects were separated into priority categories:
 - Priority 1: Suitable off-site levy projects with established cost estimates.
 - Priority 1A: Suitable off-site levy projects with established cost estimates that have been initialized or completed. Therefore, off-site levies spent to date must be considered.
 - Priority 1B: Suitable levy projects with order of magnitude cost estimates to be refined as more detailed cost estimates become available.
- The growth boundary and development areas are based on the 25-year growth horizon.
- An annual inflation factor was applied to the infrastructure project costs to account for increased costs in the proposed construction year.
- Grant funding has been applied for those projects that have already received funding.
- No interest or carrying charges have been included at this stage.



Off-Site Levy Rates

Infrastructure	Proposed Levies				
	Priority 1	Priority 1A	Priority 1B	Combined	Combined Minus Existing Balances
	\$/ha	\$/ha	\$/ha	\$/ha	\$/ha
Water	\$53,041	\$0	\$0	\$53,041	\$50,253
Wastewater	\$55,313	\$13,522	\$0	\$68,834	\$68,834
Stormwater	\$0	\$0	\$0	\$0	\$0
Transportation	\$6,854	\$14,052	\$46,072	\$66,978	\$65,679
Facilities	\$0	\$0	\$0	\$0	\$0
Total	\$115,207	\$27,574	\$46,072	\$188,853	\$184,765

Off-Site Levy Review Questions

Questions regarding the Off-site Levy Review can be directed to:

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