

Development Summary Report for 2020

Executive Summary

2020 saw a decline in development activity following a trend of year-to-year decreases and likely influenced by the effects of the COVID-19 epidemic. The population is estimated to have increased by 788 residents¹ which is a 2.7% increase over 2019. The number of new homes built in Cochrane in 2020 was down to 303, which is a decrease from the previous year's rate of 368. This year's summary report is a continuation of the previous year's methodology, using the estimated number of dwelling units based on Building Permit data and registered subdivision plan as well as tentative plan in the "to be subdivided" column. These numbers will get more and more refined the closer each neighbourhood comes to completion.

By settling into this development trend, Cochrane's growth projection has slowed compared to last year. (2019 projections)

- 15.6 – 18.4 years of land use approved area (15.8 – 18.6 last year)
- 19.1 – 22.7 years of neighbourhood plan approved area (19.3 – 22.7 last year)
- 6.8 – 8.1 years of growth within current water limits (6.8 – 8.1 last year)

According to the growth projections and the town's land supply policies, these numbers are on track and put the Town in a good position to respond to growth proactively.

Out of 153 Development Permits applications in 2020, 57 were for non-residential development, including industrial, changing the uses of existing development, new commercial construction, and commercial expansions. Further generating commercial activity in our communities, there were 17 development permits for major home-based businesses, where clients visit the home.

This report reviews the year over year change that has occurred in Cochrane's ten active growth neighbourhoods over 2020. Regardless of how land use or plans are in place, new home purchases are generally market driven. The projections in this report do not account for environmental, social, political, or economic factors either imposed on the Town or occur within the Canadian and Albertan context.

¹ No census has conducted in 2020. An estimated growth rate based on the number of new dwellings (303) by the average household size (2.6) was used instead.

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Table 1 - Residential development (dwelling numbers) by community with land use²

Community	ASP Stage 1	ASP Stage 2	NP Stage 1	NP Stage 2	NP Stage 3	Building Permits end of 2019	Building Permits end of 2020	Homes built in 2020	Balance of dwellings with land use	Dwellings with SD, not built	Dwellings no SD, not built	Population 2019 Census	Population 2020 Estimate
Fireside	2100	-	1298	1382	-	906	957	51	1723	52	1671	2019	2152
Heartland	1237	893	-	-	-	734	796	62	1334	158	1176	1650	1811
Heritage Hills	1818	-	534	1128	-	563	570	7	1092	52	1040	1577	1595
River Heights	4620	-	-	-	-	-	-	-	-	-	-	-	-
Rivercrest		-	666	-	-	7	19	12	647	66	581	0	31
Southbow Landing ³		-	2853	-	-	-	-	-	1907	-	1907	0	0
The Willows		-	746	-	-	438	457	19	207	103	104	745	794
Riversong	-	-	803	-	-	747	748	1	55	40	15	2888	2922
Riviera		-	-	552	-	383	395	12	157	138	19		
Precedence		-	-	-	-	479	21	63	42	416	36	380	0
Sunset Ridge	1302	-	-	1801	645	2518	2587	69	1161	100	1061	5620	5799
Total	11077	893	6900	4863	1124	6317	6580	275	8699	733	7954	13239	15214

Table 2 - Residential development (dwelling numbers) by community without land use/neighbourhood plans approved

Community	ASP Stage 1	ASP Stage 2	NP Stage 1	NP Stage 2	NP Stage 3	Building Permits	Balance of dwellings w/o land use
Greystone	1091	-	694	-	-	-	694
Southbow Landing	4620	-	2853	-	-	-	946
Summit of River Heights		-	363	-	-	-	363
Total	5711	-	3910	-	-	-	2003

² as of December 31, 2020

³ R-M land use was only given to 7.5 acres (equating to 304 units). NP estimates 1250 total R-M units. Balance of dwellings estimate reduced by 946 dwellings.

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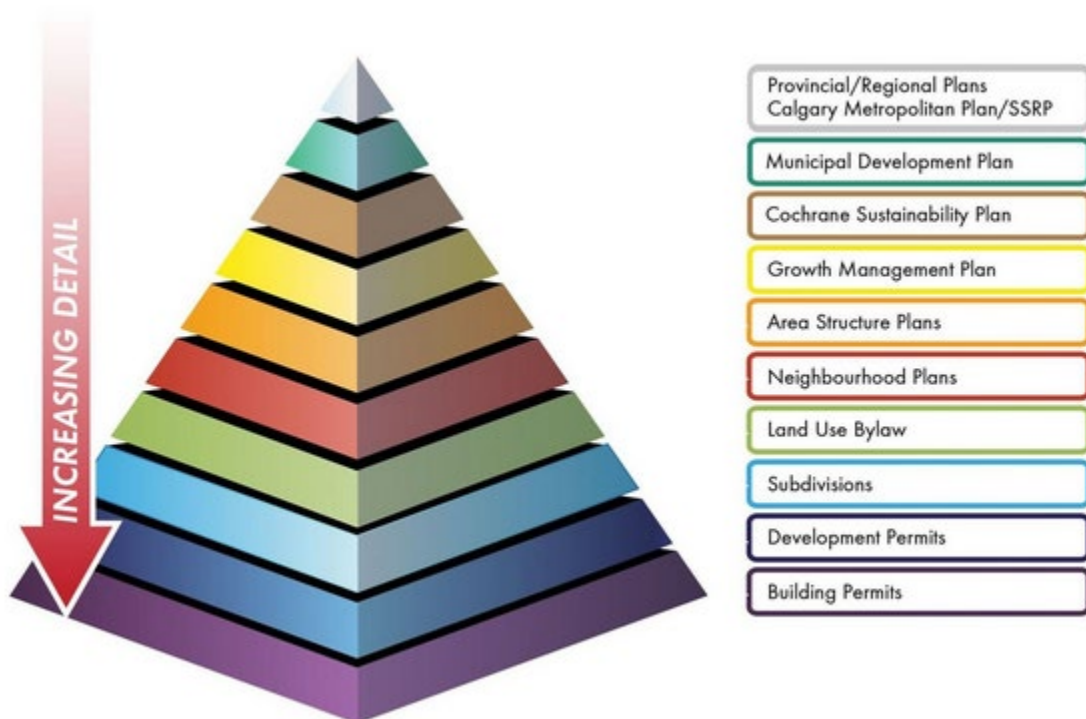
Introduction

Originating in 2017, this report is a Development Summary Report for 2020. This report summarizes the amount of development in each of the town's new communities, how much of that land has land use approval, how much has been built and how much remains. Tables 1 and 2 provide that information for each community, using the information contained in the Area Structure Plans, Neighbourhood Plans, subdivision data and the building permit activity report for all of 2020.

To manage the sustained development growth in Cochrane effectively, the Town has several planning documents that shape our new communities. Section 632(1) of the Municipal Government Act ("MGA") requires the Town to approve and adopt a Municipal Development Plan ("MDP"). This is our over-arching planning document and provides the strategic framework for development within Cochrane. Other significant planning documents include the Cochrane Sustainability Plan and Growth Management Strategy. These plans build on the policies of the MDP. They increase in the amount of policy detail incrementally. Next in this order of detail in the Area Structure Plan, followed by Neighbourhood Plans and then the Land Use Bylaw.

Figure 1 (below) illustrates the hierarchy of planning document, from the highest level (MGA) to the non-statutory Neighbourhood Plan.

Figure 1 Planning Document Hierarchy



In addition to the level of detail between them, there is a significant difference between Area Structure Plans and Neighbourhood Plans. Area Structure Plans ("ASP") are established by Bylaw, approved by Council, and provided for in the MGA (s.633). As such they are statutory planning documents. Neighbourhood Plans, on the other hand, are approved by resolution of Council. They do not hold any statutory status and are intended to inform and provide an additional level of detail for the overall pattern of development, location of land uses, road and path system layout, areas of open space; adding detail and guidance to the statutory ASP.

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There are currently seven Area Structure Plans and 14 Neighbourhood Plans adopted for growth areas within the Town boundary.

These plans establish the principles of development of an area, providing general land use themes. The neighbourhood plans that are currently approved by Council incorporate both residential and non-residential areas as a central tenet of best planning practice in building “complete communities”. This report identifies both residential and non-residential development in ASP and NP documents to provide a reflection of the development in Cochrane.

This report goes on to consider those parcels that are currently under construction. The balance of the potential future development that is yet to commence construction and does not yet have Building Permit approval can be assumed. By looking at this potential balance of development and considering the amount of annualized building activity, we are able to forecast a potential future land supply.

This report also considers an assumed population increase (and total resulting population) and how that is affected by the availability of adequate water servicing to the Town.

The following community profiles provide information extracted from current ASP and NP, together with Building Permit data held by the Town’s Safety Codes Department.

Community Profiles

1. Fireside

The West Ridge Area Structure Plan was adopted April 14, 2009. It covers the whole of the land that is now the Fireside community. The ASP estimates the total number of dwelling units in the plan area to be a minimum of 2,100.

There are two Neighbourhood Plans associated with the Fireside community. Stage 1 was adopted March 29, 2010 and Stage 2 was adopted June 23, 2014. The estimated total dwelling units for each stage is 1,298 in Stage 1 and 1,382 in Stage 2. This equates to a total anticipated number of dwellings of 2,680 (580 units more than the minimum established in the ASP).

Building Permit activity indicates that 51 dwelling units were completed or under construction in 2020 for a total of 957 dwelling units within Fireside. There are 52 lots with subdivision approval that have not had dwellings constructed on them yet.

If relying on the Neighbourhood Plan estimate, which provides a greater level of detail than the ASP, this would equate to a balance of 1723 dwelling units to be constructed. This means there are approximately 1671 dwellings yet to be subdivided in Fireside.

Table 3 provides the community statistics from the Neighbourhood Plans.

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Table 3 – Fireside Community Statistics

Fireside Neighbourhood Plan	Stage 1		Stage 2	
	Area (ac)	% of plan	Area (ac)	% of plan
Residential	57.39	52.5	93.77	66.1
Non-Residential	9.22	8.4	0	0
School Site	8.00	7.3	0	0
Municipal Reserve	8.88	8.1	8.25	5.8
Other (Roads, PS, etc.)	25.78	23.7	40.13	28.3
Total	109.27	100	141.88	100

2. Greystone

The Greystone Area Structure Plan was adopted on July 9, 2018. It covers the whole of the land that is the Greystone community as well as existing industrial and institutional lands. The ASP estimates the total number of dwelling units in the plan area to be approximately 1,091 (2,837 people / 2.6 people per household).

There is one Neighbourhood Plan associated with the Greystone community. The Greystone Neighbourhood Plan was adopted on August 13, 2018. The estimated total dwelling units for the NP is approximately 694 (375 units less than the estimate in the ASP).

Council has yet to consider land use approval for these lands. No subdivision or development has occurred on these lands yet, apart from the development of a stormwater pond.

Table 4 provides the community statistics from the Area Structure Plan and the Neighbourhood Plans.

Table 4 – Greystone Community Statistics

Greystone	ASP		NP	
	Area (ac)	% of plan	Area (ac)	% of plan
Residential	-	-	52.85	35.8
Non-Residential	-	-	35.71	24.2
School Site	-	-	0	0
Municipal Reserve	-	-	14.75	10
Other (Roads, PS, etc.)	-	-	43.93	29.8
Total	-	-	147.24	100

3. Heartland

The Heartland community was approved as two area structure plan areas in March of 2015. Heartland Stage 1 ASP estimates a minimum 1,237 dwellings and Heartland Stage 2 ASP estimates a minimum of 893 dwellings, equating to 2,130 dwellings at full build out.

Building Permit activity indicates that 62 dwelling units were completed or under construction in 2020 for a total of 796 dwelling units within Heartland. There are 158 lots with subdivision approval that have not had dwellings constructed on them yet.

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Table 5 provides the community statistics from the Area Structure Plans.

Table 5 – Heartland Community Statistics

Heartland ASP	Stage 1		Stage 2	
	Area (ac)	% of plan	Area (ac)	% of plan
Residential	84.78	58	57.62	53
Non-Residential	0	0	7.93	7
School Site	0	0	0	0
Municipal Reserve	17.64	12	8.35	8
Other (Roads, PS, etc.)	65.08	30	35.09	32
Total	167.5	100	108.99	100

4. Heritage Hills

The Heritage Hills Area Structure Plan was adopted in April of 2014. It covers the whole of the land that is the Heritage Hills community, including the existing built area. The ASP estimates the total number of dwelling units in the plan area to be a minimum of 1,818.

There is one Neighbourhood Plan associated with the Heritage Hills community and an older concept plan. When the Neighbourhood Plan was adopted on March 29, 2016, the older area was 95% subdivided and almost completely built out. The estimated total dwelling units for the Stage 2 Neighbourhood Plan is approximately 1,128. This equates to a total anticipated number of dwellings of 1662 (156 units less than the estimate in the ASP).

Building Permit activity indicates that 7 dwelling units were completed or under construction in 2020 for a total of 570 dwelling units within Heritage Hills. There are 52 lots with subdivision approval that have not had dwellings constructed on them yet.

Relying on the Neighbourhood Plan estimate, which provides a greater level of detail than the ASP, this would equate to a balance of 1,092 dwelling units to be constructed. This means there are approximately 1,040 dwellings yet to be subdivided in Heritage Hills.

Table 6 provides the community statistics from the Neighbourhood Plan.

Table 6 – Heritage Hills Community Statistics

Heritage Hills	ASP		NP Stage 2	
	Area (ac)	% of plan	Area (ac)	% of plan
Residential	-	-	80.16	56.6
Non-Residential	-	-	4.89	3.5
School Site	-	-	11.17	7.9
Municipal Reserve	-	-	7.86	5.5
Public Utility	-	-	7.31	5.2
Other (Roads, PS, etc.)	-	-	30.27	21.4
Total	-	-	141.66	100

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5. River Heights

The River Heights Area Structure Plan was adopted in October of 2011. It covers a large area of land south of the Bow River including the neighbourhoods of Rivercrest, the Willows of River Heights, the Summit of River Heights, and Southbow Landing. There are other areas of land within the River Heights ASP area that are currently without neighbourhood plans, including the existing highway commercial area and other future development areas. The broad nature of the plan is not particularly meaningful in understanding the level of development at the community level. Nevertheless, the ASP estimates the total number of dwelling units in the plan area at 4,620.

Table 7 provides the community statistics from the Area Structure Plan.

Table 7 – River Heights Community Statistics

River Heights	ASP	
	Area (ac)	% of plan
Residential	548	54
Non-Residential	104	10
School Site	34	3
Other (MR, Roads, PS, etc.)	336	33
Total	1,022	100

There are currently four Neighbourhood Plans associated with the River Heights area. The dwelling unit estimates for each neighbourhood are Rivercrest – 666, the Willows of River Heights – 746, the Summit of River Heights – 363, and Southbow Landing – 2853. This totals 4,628, slightly more than estimated in the ASP, and does not include all the lands in the ASP with development potential.

a) Rivercrest

The Rivercrest NP was adopted in May of 2017. The estimated total dwelling units is 666.

Building Permit activity indicates that 12 dwelling units were completed or under construction in 2019 for a total of 19 dwelling units within the Rivercrest. There are 66 lots with subdivision approval that have not had dwellings constructed on them yet.

If relying on the Neighbourhood Plan estimate, this would equate to a balance of 647 dwelling units yet to be constructed as well as 581 dwellings yet to be subdivided in Rivercrest.

Table 8 provides the community statistics from the Neighbourhood Plan.

Table 8 – Rivercrest Community Statistics

Rivercrest	NP	
	Area (ac)	% of plan
Residential	53.1	64.5
Non-Residential	0	0
School Site	8.1	10
MR	2.3	2.7
Other (Roads, PS, etc.)	18.8	22.8
Total	82.3	100

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b) Southbow Landing

The Southbow Landing NP was adopted in October of 2015 and Council granted land use for most of the area in September of 2017. Southbow Landing NP estimates 2,853 dwelling units. Three areas of multi-family residential were not given land use at that time. These areas equate to an estimated 946 dwellings. Therefore, the estimated total dwelling number for Southbow Landing is 1,907 units.

No further subdivision or development has occurred on these lands yet. It could be approximately 2-5 years until development commences.

Table 9 provides the community statistics from the Neighbourhood Plan.

Table 9 – Southbow Landing Community Statistics

Southbow Landing	NP	
	Area (ac)	% of plan
Residential	189.24	49.3
Non-Residential	48.08	12.5
School Site	26.42	6.9
Municipal Reserve	11.98	3.1
Other (MR, Roads, PS, etc.)	108.11	28.2
Total	383.83	100

c) The Willows of River Heights

The Willows of River Heights NP was adopted in June of 2012 and since has also been granted land use for most of the area. The NP estimates 746 dwelling units.

Building Permit activity indicates that 19 dwelling units were completed or under construction in 2020 for a total of 457 dwelling units within the Willows. There are 103 lots with subdivision approval that have not had dwellings constructed on them yet.

If relying on the Neighbourhood Plan estimate, which provides a greater level of detail than the ASP, this would equate to a balance of 207 dwelling units to be constructed. This means there are approximately 104 dwellings yet to be subdivided in the Willows.

Table 10 provides the community statistics from the Neighbourhood Plan.

Table 10 – The Willows of River Heights Community Statistics

The Willows	NP	
	Area (ac)	% of plan
Residential	45.37	62.3
Non-Residential	0.99	1.4
School Site	1.02	1.4
Municipal Reserve	6.57	9.0
Other (Roads, PS, etc.)	18.82	25.9
Total	72.77	100

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d) The Summit of River Heights

The Summit of River Heights NP was adopted on April 10, 2017. The NP estimates 363 dwelling units.

Council gave First Reading of Bylaw 25/2017 to approve land use for these lands on June 26, 2017 with a Public Hearing held in July of 2017. This bylaw has since expired due to Council not giving the bylaw a second or third reading in the past 2 years from the date of First Reading. A new application may be applied for and brought forward to Council again. No subdivision or development has occurred on these lands yet.

Table 11 provides the community statistics from the Neighbourhood Plan.

Table 11 – The Summit of River Heights Community Statistics

The Summit	NP	
	Area (ac)	% of plan
Residential	25.17	62
Non-Residential	0	0
School Site	1.98	4.8
Municipal Reserve	2.10	5.2
Other (MR, Roads, PS, etc.)	11.61	28.4
Total	40.87	100

6. Riversong

The South Ridge Area Structure Plan was adopted in 1994 and updated in 2001, 2002, and 2011. The ASP covers all stages of Riversong, including Riviera and Precedence as well as the existing gravel operation lands south of the Bow River. The ASP includes a Design Brief for Riversong however offers no estimation of dwelling units.

There are three Neighbourhood Plans associated with the South Ridge area. The dwelling unit estimates for each neighbourhood are Riversong – 803, Riviera – 552, and Precedence – 479, which totals 1,834.

a) Riversong

The Riversong Stage 1 NP was adopted in May 28, 2010. A significant portion of the community already had land use and a smaller portion was already subdivided and built when the NP was approved. The NP estimates 803 dwelling units.

Building Permit activity indicates that 1 new dwelling units were completed or under construction in 2020.

If relying on the Neighbourhood Plan estimate, which provides a greater level of detail than the ASP, this would equate to a balance of 55 dwelling units to be constructed. There is one remaining multi-family parcel to be developed in Stage 1, but no current development plans or timeline for completion of this parcel exists.

Table 12 provides the community statistics from the Neighbourhood Plan.

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Table 12 – Riversong Stage 1 NP Community Statistics

Riversong (Stage1)	NP	
	Area (ac)	% of plan
Residential	69.86	60.3
Non-Residential	0	0
School Site	22.16	19
Municipal Reserve	1.09	0.9
Other (Roads, PS, etc.)	22.81	19.7
Total	115.92	100

b) Riviera

The Riversong Stage 2 NP, known as Riviera, was adopted in July 18, 2011. The NP estimates 552 dwelling units.

Building Permit activity indicates that 12 dwelling units were completed or under construction in 2020 for a total of 395 dwelling units within Riviera. There are 138 lots with subdivision approval that have not had dwellings constructed on them yet, in this case relating to a multi-family site which is slated for only 84 dwellings.

If relying on the Neighbourhood Plan estimate, which provides a greater level of detail than the ASP, this would equate to a balance of 157 dwelling units to be constructed. This means there are approximately 19 dwellings yet to be subdivided in Riviera.

Table 13 provides the community statistics from the Neighbourhood Plan.

Table 13 – Riversong Stage 2 NP (Riviera) Community Statistics

Riversong (Stage 2), Riviera	NP	
	Area (ac)	% of plan
Residential	42.13	61.4
Non-Residential	0	0
School Site	0	0
Municipal Reserve	0.30	0.4
Other (Roads, PS, etc.)	26.17	38.2
Total	68.6	100

c) Precedence

The Riversong Stage 3 NP, known as Precedence, was adopted in April 24, 2017. The NP estimates 479 dwelling units.

Building Permit activity indicates that 42 dwelling unit were completed or under construction in 2020 for a total of 63 dwelling units within Precedence. There are 36 lots with subdivision approval that have not had dwellings constructed.

If relying on the Neighbourhood Plan estimate, which provides a greater level of detail than the ASP, this would equate to a balance of 416 dwelling units to be constructed. This means there are approximately 380 dwellings yet to be subdivided in Precedence.

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Table 14 provides the community statistics from the Neighbourhood Plan.

Table 14 – Riversong Stage 3 NP (Precedence) Community Statistics

Riversong (Stage 3), Precedence	NP	
	Area (ac)	% of plan
Residential	37.58	73
Non-Residential	0	0
School Site	0	0
Municipal Reserve	0.94	0.9
Other (Roads, PS, etc.)	13.06	26.1
Total	51.58	100

7. Sunset Ridge

The Sunset Ridge Area Structure Plan was first adopted in 2005. The community started developing but underwent a significant developer ownership change. The existing developed area was then renamed the Stage 1 area and a Stage 2 Area Structure Plan was adopted in 2013. The Stage 2 ASP was updated in 2019. The Stage 1 ASP estimates 1,302 dwelling units.

There are two Neighbourhood Plans associated with the Sunset Ridge Stage 2 area. The dwelling unit estimates for each neighbourhood are Stage 2 – 1,801 and Stage 3 – 645, which totals 2,446.

Building Permit activity indicates that 69 dwelling units were completed or under construction in 2020 for a total of 2,587 dwelling units within Sunset Ridge. There are 169 lots with subdivision approval that have not had dwellings constructed on them yet. This means there are approximately 1,061 dwellings yet to be subdivided in Sunset Ridge Stage 2 and Stage 3 areas.

Table 15 provides the community statistics from the Area Structure Plans.

Table 15 – Sunset Ridge Community Statistics

Sunset Ridge	ASP Stage 1		NP Stage 2		NP Stage 3	
	Area (ac)	% of plan	Area (ac)	% of plan	Area (ac)	% of plan
Residential	113	52	135.06	56.7	51.05	63.6
Non-Residential	8	4	0	0	0	0
School Sites	19	9	4	1.7	0	0
MR (Parks)	22	10	31.76	13.3	5.46	6.8
Other (Roads, PS, PUL, etc.)	54	25	67.24	28.2	23.67	29.5
Total	+/- 217	100	238.06	100	80.28	100

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Analysis

Land Supply

The Safety Codes Department has provided historical building rates for residential development for the past ten years. This amount of development activity is provided in the table below.

Table 16 Building Permit (BP) data from 2011-2020

Table 16 – Building Permit Statistics

	Year	Number of New Dwellings
1	2011	372
2	2012	544
3	2013	781
4	2014	969
5	2015	847
6	2016	469
7	2017	588
8	2018	359
9	2019	368
10	2020	303
Total	(10 years)	5600

The mean number of BPs, as an annual average, is 560 dwellings per year.

2014 and 2015 BP figures appear to be irregular variances (greater than 1 standard deviation of the average) to the historic general trend. To provide an upper and lower annual building rate, these two years have been removed. With the outliers taken out, a lower annual build rate of 473 dwellings is produced. The average of the upper and lower build rate is 517.

The remaining 8,699 estimated total number of dwellings with land use yet to be constructed (see table 1) would equate to a 15.5-year land supply at the upper average annual building rate and 18.4-year land supply at the lower average.

Other factors need to be considered in estimating land supply, for example, the number of communities that have the benefit of ASP and NP approval but not land use approval. For proposed communities and land that have approved plans but not land use yet, there are a potential 2,242 dwellings. This equates to a 3.9-year land supply at the upper annual rate and 4.6-year land supply at the lower annual rate.

Population

Cochrane's current population based on the most recent municipal census indicates 29,277 residents. An estimated 788 residents were added in 2020, for a total 30,065.

Household make up indicates an average multiplier of 2.6 people per dwelling⁴.

⁴ Statistics Canada, 2016 Census of Population.

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If only those dwellings with subdivision approval but not yet built were completed (745), the current population would increase by 1,937 to 32,002.

Using the total number of estimated dwellings currently with land use, but not yet built (8,699) this would equate to an additional 22,617 residents. This would bring the total population of Cochrane to 52,682.

Including the additional development proposals that do not have land use but have approved ASP or NP approval (2,003), this would increase the potential population by a further 5,208. This means the population could rise to a total of 57,890 in the next 19 to 21 years.

These scenarios are summarized in Table 17 below.

Table 17 – Population Growth Scenarios

	Scenario 1 Dwellings with Subdivision, not yet built	Scenario 2 Balance of all dwellings with land use	Scenario 3 All potential dwellings
#of Dwellings	745	8,699	10,702 (8,699+2,003)
Land Supply	1.3 – 1.6 years	15.5 – 18.4 years	19.1 – 22.6 years
Avg. Household Size	2.6	2.6	2.6
Subtotal	1,937	22,617	27,825 (22,617+5,208)
Current Population	30,065	30,065	30,065
Total Resulting Population	32,002	52,682	57,890

These population estimates for the Town within the next 15.5 – 18.4 years is based on current land uses and assumes that development occurs at an average rate of between 473 and 560 new dwellings per year consistently over that period. It does not account for environmental, social, political, or economic factors either imposed on the Town or occur within the Canadian and Albertan context. It does not take into account periods of slower than average growth for an extended period of time.

Water Licenses

Part of the original notice of motion was to include the availability of water licenses to serve the potential residential growth.

Administration has confirmed that there is room within the current water licenses and water treatment capacity available in Cochrane to support a population of 40,000. Given Cochrane’s estimated population of 30,065, this means that we can support another 9,935 residents. This equates to approximately 3,821 dwellings. Using the annualized average build rates discussed above and assuming Cochrane continues to grow at its current rates, the Town would have enough water license availability to support 6.8 – 8.1 years of residential growth.

Administration is actively engaged in exploring and securing sufficient water license and infrastructure to meet the future long-term growth need of the town and its population. It is anticipated that this will occur before the population reaches the growth limits.