



# SUBDIVISION Endorsement and Building Permit Release Requirements

Community Growth & Investment ■ Town of Okotoks, Box 20 (5 Elizabeth St.), Okotoks AB, T1S 1K1 ■ [planning@okotoks.ca](mailto:planning@okotoks.ca) ■ Phone: 403-995-2760

The Town of Okotoks has implemented a new subdivision endorsement (i.e. post approval) process with the intention of providing greater flexibility for developers. This new process is outlined below.

## Process Overview

<b>1. Subdivision Approval by the Town’s Subdivision Authority</b>	
<b>2. Enter into a Subdivision Servicing Agreement (SSA) with the Town</b> <i>The below items must be completed prior to finalization and execution of the SSA. The Developer can request the preparation of the SSA once the subdivision application has been approved and the Engineering Design Drawings have been submitted to the Town by contacting the Subdivision Officer.</i>	
a. Submission and Acceptance of Engineering Design Drawings	<ul style="list-style-type: none"> <li>• Detailed review is undertaken by Community Development &amp; Engineering, including interdepartmental Review Meeting</li> <li>• Comments are provided to consultant and some revisions may be required prior to acceptance</li> </ul>
b. Submission of any other Engineering documentation (if required)	<ul style="list-style-type: none"> <li>• If there are other items that impact engineering design, such as transportation impact analysis or further geotechnical information</li> </ul>
c. Community Mailbox Location Acceptance	<ul style="list-style-type: none"> <li>• Proposed locations of Community Mailboxes (CMB) have been identified by Canada Post and accepted by the Town</li> </ul>
d. Offsite Levies and Securities	<ul style="list-style-type: none"> <li>• Offsite Levies due on execution of the SSA per the Offsite Levies Bylaw</li> <li>• Submission of performance securities in the form and amount identified in the SSA</li> <li>• Identification of any Endeavors to Assist</li> </ul>

### 3. Prior to endorsement requirements

*In addition to execution of the SSA, the below items are required prior to endorsement of the plan of subdivision. These items are typical requirements and may not apply in all cases.*

a. Submission of Landscape Plans	<ul style="list-style-type: none"><li>• Landscape Design Plans are prepared by landscape architect and submitted to Parks in the prescribed format</li></ul> <p><i>Town acceptance, including potential revisions, is not required prior to endorsement</i></p>
b. Submission and acceptance of Utility Line Assignment Plans	<ul style="list-style-type: none"><li>• Utility providers (Fortis Alberta and ATCO Gas) have submitted shallow utility designs for review by Community Development &amp; Engineering</li></ul> <p><i>Town acceptance of the proposed design is required prior to endorsement</i></p>
c. Submission of Endorsement Package	<ul style="list-style-type: none"><li>• Registration documents are prepared by the Applicant or Surveyor based on the Town templates</li><li>• Town undertakes internal review and external legal review of documents</li><li>• Community Development &amp; Engineering reviews and verifies the Utility Right-of-Way and Overland Drainage Plans</li><li>• Final documents are executed by Town and held until all prior to endorsement requirements have been completed before release to the Applicant<sup>1</sup></li></ul>
d. Land Use Sign (LUS) accepted	<ul style="list-style-type: none"><li>• Design of the LUS is submitted to Subdivision Officer for review and approval</li></ul>
e. Submission of other plans or documentation	<ul style="list-style-type: none"><li>• Any special case prior to endorsement conditions, such as submission of architectural controls or developer fencing designs.</li></ul>

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<sup>1</sup> Releasing endorsement documents directly to the Applicant for registration is being done by the Town on a trial basis, the typical requirement is to release the documents through the Town's Solicitor under trust conditions.

**4. Prior to Building Permit Release**

*In addition to the prior to endorsement requirements, the below items are required prior to release of building permits.*

a. Release of Registration Documents	<ul style="list-style-type: none"><li>Once all of the prior to endorsement requirements and conditions have been met, the Town will release the endorsement package to the Applicant<sup>2</sup></li></ul>
b. Land Use Sign is installed	<ul style="list-style-type: none"><li>LUS is installed and picture is provided to Subdivision Officer for verification of installation or inspection is undertaken</li></ul>
c. All Alberta Safety Code requirements have been addressed	<ul style="list-style-type: none"><li>This includes the verification of a functioning all weather access road as well as fire hydrants installed and operational.</li></ul>

**5. Prior to Building Occupancy**

*The below items are required to be in place prior to occupancy of new residential construction being permitted.*

a. Completion of Construction	<ul style="list-style-type: none"><li>Local improvements are completed to the satisfaction of the Community Development &amp; Engineering Manager (i.e. Construction Completion Certificates are issued or issuance is imminent).</li></ul>
b. Shallow utility installation is imminent	<ul style="list-style-type: none"><li>A date of installation has been scheduled by the utility installer</li></ul>

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<sup>2</sup> Confirmation of subdivision registration is no longer required prior to the release of building permits

## Show Homes

The Community Development & Engineering Manager may permit **up to six contiguous<sup>3</sup> lots** to be developed as show homes subject to application and the below requirements being met.

### **Prior to show home building permit release requirements**

*In addition to approval of the subdivision, the below items are required prior to release of show home building permits.*

a. Fully executed SSA with the Town	<ul style="list-style-type: none"><li>• Engineering design is complete, offsite levies due on execution have been paid, and securities and insurance are in place</li></ul>
b. Submission and <b>acceptance</b> of Utility Line Assignment Plans	<ul style="list-style-type: none"><li>• Utility providers have submitted shallow utility designs and have been accepted by Community Development &amp; Engineering</li></ul>
c. Submission of Endorsement Package	<ul style="list-style-type: none"><li>• A complete endorsement package with all required materials has been received by the Town</li></ul>
d. Submission of other plans or documentation	<ul style="list-style-type: none"><li>• Any special case prior to endorsement conditions, such as submission of architectural controls or developer fencing designs.</li></ul>
e. All Alberta Safety Code requirements have been addressed	<ul style="list-style-type: none"><li>• This includes verification of functioning all weather access road and fire hydrants installed and operational.</li></ul>

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<sup>3</sup> Lots may have intervening roads, such as units across the street from each other.

**Developer Tiering and Performance Securities**

The Town of Okotoks has moved to a tiered system for subdivision performance securities to rank developers into tiers in order to reduce the performance securities for developers with a proven record of development in Okotoks.

Performance securities are to be provided by letter of credit in accordance with the terms specified in the Subdivision Servicing Agreement. Tier ‘A’ Developers may be eligible to provide performance security by surety bonds at the discretion of the Chief Administrative Officer.

Tier	Eligibility <sup>4</sup>	Minimum Securities Required <sup>5</sup>
C	No experience in Okotoks, no experience in similar municipalities, or no active agreements in past 5 years  Ongoing issues meeting SSA obligations	<b>100%</b> of the cost of construction <sup>6</sup> of local improvements and landscaping or \$150,000, whichever is greater  <b>100%</b> of the remaining offsite levies to be paid
B	Satisfactory completion <sup>7</sup> of <b>two</b> SSAs in Okotoks with at least one completed in past five years  Obligations met within SSA prescribed timelines	<b>50%</b> of the cost of construction** of local improvements and landscaping or \$150,000, whichever is greater  <b>50%</b> of remaining offsite levies to be paid
A	Satisfactory completion of <b>four</b> SSAs in Okotoks with at least one completed in past five years  Obligations met within SSA prescribed timelines	\$3,500 per residential lot and \$17,500/ha for multi-residential/non-residential lots or \$150,000, whichever is greater

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<sup>4</sup> The Community Development & Engineering Manager would have the discretion to establish or modify the tier of a developer in consideration of (1) unique situations, (2) evidence of satisfactory development completion in other municipalities, and (3) performance issues. Upper tier developers may be downgraded to a lower tier for failing to meet obligations with the timelines prescribed in the SSA.

<sup>5</sup> Additional securities may be required for critical offsite infrastructure improvements that are necessary to service the phase.

<sup>6</sup> A developer may be required to provide an estimate of the full cost to complete construction for acceptance by Community Development & Engineering.

<sup>7</sup> Satisfactory completion includes completing necessary construction work within the timelines prescribed in the SSA, payment of fees and levies on time, and reasonably addressing any nuisance issues or other housekeeping matters over the life of the agreement.