



CALGARY LEGACY COMMUNITY ASSOCIATION (CLCA)

BUSINESS PLAN 2021

EXECUTIVE SUMMARY

The Calgary Legacy Community Association CLCA was formally incorporated under the *Societies Act* of Alberta in October 2018 and memberships became available for purchase in November 2019. By the end of 2019 we had close to 100 members. In February 2020 we hosted our first AGM introducing formerly the CLCA into the community. After a successful community event in January 2020 celebrating our Annual Winter Skating Festival and the excellent results of the AGM in February, COVID 19 restrictions came into place and all in-person events, such as our Annual Easter Egg Hunt was cancelled.

Despite the restrictions and limitations to execute events during 2020, the CLCA came up with a series of initiatives that encouraged safe celebrations in the community, helping people to be together while remaining physically apart. By the end of 2020, the CLCA grew to almost 200 members.

The main purpose of the CLCA continues to be “building our community together”. Therefore, our job is to facilitate, support and encourage recreational, cultural, social, athletic and educational activities in the community. This will help us to continue building the community spirit in Legacy and achieve and preserve a vibrant community for living, working, learning and playing.

We remain committed to our Mission and Vision statements. Financial responsibility and community building will continue to be a focus in 2021.

OUR MISSION

We want to foster a sense of community pride and spirit by engaging and representing our diverse neighborhood, through partnerships, programs and services, as well as events that brings us all together.

OUR VISION

We are building the legacy of a safe, caring and vibrant community where people are connected.

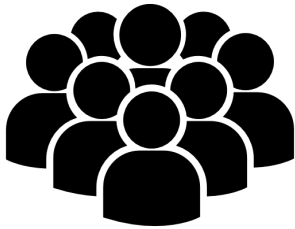
OUR VALUES

Pride
Integrity
Diversity
Accountability
Sustainability



OUR COMMUNITY

What we know about the people we serve:



2,315

Population in private household
Total Houses: 1,660



0-14: 20%. 65+: 5%

Distribution by Age



\$104,855

Median Household Income

**Source: 2016 City of Calgary Census*

As of January 2021, 1,733 single family homes and 939 multi-family homes have been built in Legacy for a total of 2,672 households. This brings the estimated population number to 3,740.

CLCA Members:

As of January 10, 2021 the CLCA has 192 active memberships. 172 are family memberships, 20 are individual memberships.

Members receive VIP status at events, often with additional perks. They will also have priority access or notice to events that require registration. Members can run for our board and executive, access discounts in local businesses with whom we have partnered or host in our small business directory, and they enjoy access to extended benefits from the Federation of Calgary Communities.

CLCA Partners:

Government: The CLCA has a strong relationship with the City of Calgary and the province of Alberta. Both have been great supporters of the organization since the beginning: regularly attending our monthly board meetings as invited guests, accessing funds and grants as sponsors, providing updates around community issues, and sharing tools and important information for the CLCA to share with the broader community.



Developers and Builders: Given that our community is only partially built, the presence of the community developer's Westcreek Developments remains quite strong. Our relationship with Westcreek started before the CLCA was officially established and has evolved based on support and collaboration. Westcreek Developments often supports the events and initiatives organized by the Community Association. They are invited guests at our AGM and we keep them in the loop with ongoing projects.

As the developer of the main shopping area around Legacy, Royop is another key partner for the CLCA. Royop has also supported some of our events and we keep constant communication with them.

Currently the community has 11 builders active in Legacy. Most of them have been involved and/or sponsored one or more of the CLCA initiatives and events hosted in the past two years. In most cases our main contact is at Head Office level due to the turnover in the show home teams.

Businesses: Stores and businesses in the community have been sponsors of different events. They also have the opportunity to offer a special discount or perk to community members to support local shopping. We've also worked in the past with stores in the Walden area who have graciously sponsored us. In 2020, we allowed other businesses in the south to support events and initiatives including providing prizes and giveaways, always for community members.

As a CLCA practice, local stores will always have first right of refusal to sponsor an event before engaging others stores not located in the community.

In 2020, the CLCA started to work closer with home businesses, by hosting our first community market (online). We also created the Small Business Directory, giving everyone in the community with a small or home business the opportunity to register in the directory which is open to the public on our website.

Charity partners: As a member of the Federation of Calgary Communities, the CLCA has access to seminars and learning opportunities. The Federation offers platforms for community associations across the city to connect, exchange information, common practices and lessons learned. The Federation also offers businesses discounts that are extended to all community members.

The CLCA has worked and partnered on different occasions with the Calgary Foundation accessing grants. In 2020, we started accessing grants also from the Parks Foundation Calgary, including the Embrace the Outdoors Grant, creating the Footprints of Legacy Free snowshoe rental program for members.



Sports and Families: In July, the CLCA established a partnership with the Calgary Foothills Soccer Club as the official community official soccer program. Pending COVID updates, we anticipate a launch of this program in the Spring. This helps build our community for young families, while growing our membership as an organization.

OUR PEOPLE

BOARD OF DIRECTORS

The Calgary Legacy Community Association (CLCA) board currently consists of 9 voting members (including executive officers and directors) and is supported by Advisors (appointed by the board as required, with no right to vote or achieve quorum). In 2020, 2 advisors were considered to replace open positions in the board and were appointed by majority of votes by board members. This practice will continue, considering advisors key individuals in the succession plan.

Members of the Board are generally elected at the AGMs. Positions available on the board will be also posted on the website and on social media pages. An ad to learn more about the board and opportunities to get involved will be posted frequently in the printed newsletter. More details about nominations, elections and forming the board of directors can be found under the Bylaws.

All Directors and Advisors must be members of the Community Association.

BOARD RESPONSIBILITIES: (and current holders)

Commitment	Attend frequent general meetings (usually 1st Monday of the month).
Participation	Take an active part in community events executing roles assigned.
Advocacy	Take an interest in and promote the aims and objectives of the association.
Behaviour	Respect and follow the CLCA Code of Conduct.

Chairing board meetings will be a joint responsibility and each meeting a member of the board (including advisors) will be designated to host the upcoming meeting.



BOARD ROLES & APPOINTED MEMBERS (Update Jan. 2021):

President

(Alexandra Velosa)

- Be a member of the executive and the board.
- Be an ex-officio member of all committees of the board with voting rights.
- Signing authority on all bank accounts of the association. One of the two co-signers of cheques.
- Act as the official spokesperson for the association but may delegate such authority to the Vice-President or other member of the board.
- Represent the association in dealing with partners.
- Provide support to all directors in the development of plans and strategies.
- Work close with advisors who have no director role supporting them.

Vice-President

(Derek Sheahan)

- Be a member of the executive and the board.
- Assume the powers and duties of the president in either the temporary or permanent absence of the president.
- Signing authority on all bank accounts of the association. One of the two co-signers of cheques.
- Be the principal signing authority on all contracts and official documents.
- Oversee and supervise the finances and budget of the organization.
- Work with Secretary to file the annual report, the audited financial statements, any special resolutions, changes in the directors, amendments to the bylaws and other incorporating documents with the Corporate Registry or any other applicable regulatory body, as required by the Act, and other statutes or laws.

Treasurer

(Jose Alvarado)

- Be a member of the executive and the board.
- Signing authority on all bank accounts of the association. One of the two co-signers of cheques.
- Be responsible for the care, custody, and control of the finances and financial records.
- Provide a monthly report of revenues, expenditures, investments, amounts due and owing to the association for more than thirty days after the date that such amounts were due to be paid, keeping the board informed of the



financial position of the organization.

- Ensure that an audited financial statement for the preceding Fiscal Year is prepared and presented at the Annual General Meeting (AGM).
- Collect all monies paid to the association and deposit them within 30 days.
- Carry out other duties as required and/or assigned by the board.

Secretary

(Amanda Hodder)

- Be a member of the executive and the board.
- With direction of the president or vice-president prepare agendas for all meetings.
- Keep accurate minutes of all meetings.
- Ensure that all records of the association (other than financial records) are properly saved and maintained.
- Carry out other duties as required and/or assigned by the board.

Director of Memberships

(Kendra Read)

- Development and implementation of an annual membership plan.
- Monthly report to the board on community membership status.
- In conjunction with the Director of Web Development hold and maintain an up-to-date registry of the associations' members.
- Coordinate all opportunities to drive memberships (including renewals and new registrations).
- Communication with local businesses and set up business discounts.
- Carry out other duties as required and/or assigned by the board.

Director of Information Technology

(David Cloutier)

- Manage IT systems, including secure document storage and email systems.
- Management and maintenance of organization's website, ensuring the web is user friendly, easy to navigate and relevant with current pictures, videos and information.
- Management of an online Member Portal, including membership cards, public directories (such as the small business directory), and forms (contests, event registration, etc.)
- In conjunction with the Director of Memberships, hold and maintain an up-to-date registry of the associations' members.
- Support the Advisor of Communications and President to deliver



emails with frequent and timely information to members and the public community (email list)

- Carry out other duties as required and/or assigned by the board.

Director of Events

(Carlene Jubinville)

- Develop an annual event plan. (Winter Skating Festival, Easter Egg hunt, Jane's Walk, Neighbour Day, Halloween, Christmas, Other).
- Coordinate and implement a plan for each event or initiative including budget and post event report.
- While COVID 19 restrictions are in place, work on initiatives that replace in-person events while continue bringing the community together and celebrating key dates.
- Work with Advisor of Fundraising & Grants to apply for grants to support events and initiatives.
- Carry out other duties as required and/or assigned by the board.

Director of Volunteers

(Elaine Shaneyfelt)

- Administration of Volunteers Database.
- Work closely with directors and recruit volunteers as they request.
- Carry out other duties as required and/or assigned by the board.

Director of Social Media

(Megan Harrison)

- Develop and implement an annual social media plan.
- Day to day administration of Facebook and Instagram.
- Monthly reporting on social media to include in board meetings.
- Carry out other duties as required and/or assigned by the board.

Advisor of Communications

(Kim Dixon)

- Prepare monthly newsletter content.
- Plan, prepare and deliver members e-newsletter.
- Carry duties as required and/or assigned by the board.



Advisor of Memberships

(Darpan Shan)

- Support Director of Memberships' initiatives to recruit more members.
- Support with memberships benefits and perks
- Carry out other duties as required and/or assigned by the board.

Advisor of Development

(Evan Hendricks)

- Lead development initiatives.
- Apply for grants to finance specific projects.
(including documentation and post reports).
- Carry out other duties as required and/or assigned by the board.

Advisor of Events

(Position Available)

- Support Director of Events in the coordination and implementation of event plans in the community.
- Brainstorm ideas for new events and initiatives.
- Carry out other duties as required and/or assigned by the board.

Advisor of Fundraising & Community Grants

(Position Available)

- Apply for grants to finance events and community initiatives
(including documentation and post reports).
- Lead fundraising initiatives.
- Carry out other duties as required and/or assigned by the board.

Requirements:

- Organizational and planning skills.
- Passion to coordinate events and initiatives.
- Experience in event planning would be an asset.

VOLUNTEERS

As of January 2021, the CLCA has a database of 64 volunteers. Volunteers are usually engaged per event or initiative as needed. In 2020, about 12 volunteers outside of the board supported the Winter Skating Festival, the Thanksgiving Fundraising event, the Remembrance Day initiative and the Holiday kit. In the last quarter of 2020, an advisor was appointed as Director of Volunteers. A call out for volunteers is included every month in the printed community newsletter.



COMMUNICATIONS

Internal

The board has access to shared documents and communications in Google Workspace. The main medium of communication is via Email and through a Whatsapp group. This allows the board and executive to keep the team up to date on information in between board meetings, as well as to address specific topics that are of general board interest.

A collaborative atmosphere is encouraged in the Association and smaller Whatsapp groups are opened frequently to communicate with specific groups on specific projects.

Internal communications protocols and expectations are specified in the Code of Conduct.

External

Printed: In April 2020 we started working with Great News Media to publish Legacy's monthly newsletter. *Our Legacy* is the official community newsletter, and covers community news and is published monthly to keep content current and relevant. Delivered to every household, apartment, and business, every resident is acquainted with the community's most important information.

E-Mail: Members of the Community Association enter their email upon registration and the CLCA communicate events, initiatives and relevant community information. Non-members can also register for emails on the Legacy website. This database comprises over 600 emails of community members.

Social Media: The CLCA has a Facebook and an Instagram account. In 2020, we started using Facebook ads to connect with a targeted audience to share information about specific events and also to connect with new potential members.

PR: Our community is open to PR opportunities to share the activities that bring our community together. In 2020, our Thanksgiving Fundraising event got lots of media attention. Our event was shared in 7 media outlets, reaching 2'421,900 impressions for an approximate value of \$46,016 in free publicity. PR for Legacy helps build the profile of the community.



FINANCES

Income & Expenses

Our current sources of income are sponsorships, grants and memberships.

\$ in account by end of 2019 **\$2070**

Income 2020

Memberships	\$3887
Sponsorships	\$9063
Grants	\$0

Total Income **\$12,950**

Expenses 2020

Administration

IT Services (Stripe/Website) \$164

Insurance \$354

Taxes \$0

Memberships Managements \$204

CLCA Memberships*

(*Federation of YYC Communities - This is the first out of two years of free services for new CAs)

Accounting system \$0

Other Admin Costs* \$29 (Cash Box)

Total Administration Expenses **\$751**

Events & Initiatives (not including Fundraising events)

Winter Skating Festival \$960

AGM (signs) \$208

Easter Egg Scavenger Hunt \$366 (Prize + Plastic eggs)

Neighbour Day (online / prizes) \$499

Halloween Prizes \$

Remembrance Day Initiative \$687

Holiday Legacy Kit \$4,660

Total Expenses Events & Initiatives **\$7,380**

Total Expenses **\$8,131**

\$ in account by end of 2020 **\$6,607 + 282 CASH (incl. special funds)**



BUILDING A STRONGER COMMUNITY



WWW.CALGARYLEGACY.CA



info@calgarylegacy.ca



CalgaryLegacyCommunityAssociation



LegacyCommunity

Special Funds:

After consulting with the community the potential name for a fund to start saving to develop our Community Association space, **Building our Legacy Fund** was created.

Income from fundraising events and initiatives will be directly accounted for in this fund. The first fundraising event ever organized by the CLCA was hosted on October 10, 2020.

Thanksgiving Brunch

Income

Sponsorships \$1,600

Tickets \$1,002

In kind donations: food, juice, water, coffee, hot chocolate, music

Total Income \$2,602

Expenses \$895

Revenue \$1,707

2020 RECAP





CLCA STRATEGIC PRIORITIES

1. Get the community actively engaged and involved with the CA and build collaborative partnerships.
2. Facilitate and support recreational, cultural, social, athletic and educational activities.
3. Support community volunteerism and initiatives that bring our community together.
4. Operate a sustainable organization.
5. Plan Legacy's community space.

2021 GOALS

GOALS	DATE / PERIOD	NOTES
Finance 1. Monitoring income & expenses. 2. Monthly financial report to present at board meetings. 3. Prepare audit financial Report for the CLCA.	1. Ongoing 2. First Monday of each month 3. End of March 2021	1. 2. 3.
Memberships 1. Build a membership plan with ideas to duplicate the number of members by end of year. 2. Update all contracts with exciting local business and add new stores. 3. Review and update memberships as required.	1. Plan to be presented at March's board meeting 2. Existing contacts ready by April 2021. New contracts on going 3. Ongoing	1. 2. 3.



Web Development 1. Caching and Speed/ Performance of Website (Host Migration resulting from Rapid Growth) 2. Capacity Building for IT and Communication Systems (e.g. others ability to spread emails) 3. Membership Card Growth	1. By end of April, 2021 2. Ongoing 3. By end of October, 2021 (Push in Summer)	1. This will address several outages, and the significantly increased demand from where we started. This will migrate existing systems but also be designed as future-scalable. 2. This will include cross training for the Mailchimp distribution system, and the Memberpress Member Management system (including targeted renewal emails). 3. This would include communications reminders that people have access to the card and what benefits they receive, as well as “one-time” promotions with business sponsors.
Events 1. Develop an annual events calendar and notify business sponsors 2. Complete post event reports and share with sponsors 3. Submit pre & post event info to IT & Communications for the website, Newsletter and members’ emails	1. February 23, 2021 2. Ongoing	1. Notifying in advance while allow the business to plan their sponsorship accordingly 2.



	3. Ongoing	3.
Volunteers 1. Grow volunteer database to 100 2. Ensure volunteers are being utilized in events, membership drives, etc 3. Highlight a volunteer quarterly in newsletter	1. By end of 3rd quarter 2021 2. Ongoing 3. Begin Summer 2021. Begin Summer 2021	1. Regular newsletter and social media postings; ensure there is one avenue of response so replies can be timely. 2. We have several volunteers waiting to be asked to serve; we need to be active in looking for more ways for them to join the work of the LCA. 3. Hopefully we will have a broader involvement of volunteers
Social Media 1. Reach 1000 LIKES on facebook 2. Increase “brand” awareness 3. Facilitate the creation of an instagram page	1. End of 2021 2. End of 2021 3. End of 2021	1. Run a series of facebook engagement posts, including contests to encourage members to like and follow our page 2. Institute a bi-monthly (to start) educational “DYK” post that highlights features of our community association including differences between CLCA and RA, benefits of memberships, and what makes community associations special
Communications / Newsletters 1. Prepare an annual calendar for potential news/ideas 2. Have 10 pieces of information (articles/ CLCA info / events info, etc) per each month’s issue	1. January 31, 2021 2. 8th of each Month	1. 2.



<p>3. Find 2 regular collaborators on specific topics that provide articles each month.</p> <p>4. Send constant communication via e-newsletter to community members.</p>	<p>3. End of 2021</p> <p>4. Ongoing (2021)</p>	<p>3.</p> <p>4.</p>
<p>Fundraising & Grants</p> <p>1. Organize 3 fundraising events/initiatives in 2021 with a goal of \$5,000</p> <p>2. Apply for casino funds</p> <p>3. Obtain \$10,000 in grants for events/initiatives and projects.</p>	<p>1. Ongoing</p> <p>2. Ongoing</p> <p>3. Ongoing</p>	<p>1.</p> <p>2.</p> <p>3.</p>
<p>Development</p> <p>1. Develop Strategic Business Plan for the Community Space</p> <p>2. Develop working plan for Phase 1 - Community Garden</p>	<p>1. March 31, 2021</p> <p>2. February 28, 2021</p>	<p>1.</p> <p>2.</p>