



THE REGIONAL MUNICIPALITY OF HALTON

REQUEST FOR EXPRESSIONS OF INTEREST #REOI-002-20

TO DEVELOP GOVERNMENT-ASSISTED RENTAL HOUSING IN HALTON REGION

1. Purpose

The purpose of this Request for Expressions of Interest (REOI) is for The Regional Municipality of Halton (the “Region” and/or “Halton Region”) to:

- Gauge non-profit and private sector interest and readiness to develop government-assisted rental housing in Halton Region;
- Obtain information about (potential) projects through the attached Application Form in Appendix A;
- Provide applicants who are meeting REOI eligibility requirements with the option of joining the Region’s list of potential REOI partners, with the intent to initiate exploratory exchange of information about the application and its potential as government-assisted housing;
- Identify applications with demonstrated potential to address government-assisted housing needs longer-term, in a way that is consistent with Regional key priorities and maximizes potential internal and external funding options in 2020 and 2021.

It is noted that this REOI is issued for informational purposes only and does not constitute any obligation for the Region or the applicant to enter into a funding agreement at any point in time.

2. Background

The Region’s Comprehensive Housing Strategy 2014-2024 (CHS) sets out a 10-year target for the creation of 550 to 900 additional government-assisted housing opportunities, financed in part with Regional and/or Federal / Provincial funds. Government-assisted housing opportunities include (the development of) purpose-built rental units with program rents below the Average Market Rent (AMR) for municipalities in Halton Region, as published annually by CMHC and (the creation of additional) geared-to-income rental assistance allocations.

This REOI is primarily focused on gauging and enabling the potential for new unit development, with the understanding that government funding is required to sustainably operate (some or all) project units below the AMR.

3. Regional Key Priorities

The search for qualifying projects is informed by key priorities identified in the Region's Comprehensive Housing Strategy 2014-2024, the Strategic Business Plan, the Regional Official Plan and the Community Safety and Well-Being Plan.

Of particular note is the importance of stimulating partnerships between non-profits, agencies and private sector developers; the need to strengthen the links between support service provision and housing; and the importance of following building design principles that enhance universal accessibility and help reduce the regional carbon foot print and contribute to a more sustainable environment.

Within this context, the Region intends to use the REOI to identify applications with demonstrated potential to address government-assisted housing needs with the following priority considerations:

- The application represents or will result in a partnership initiative for purpose-built rental housing that potentially showcases leadership and innovation in the provision of accessible, environmentally sustainable housing with integrated access to a range of supports as needed, for people to lead stable and independent lives.
- The project location is within the Region's Urban Area, as specified in the Regional Official Plan and is ideally within a well-connected community (near public transit, retail and other facilities);
- Where opportune, the project could provide an appropriate mix of program funded units and market units to stimulate mixed-income community settings.
Note: the project must include at least six (6) program units;
- An appropriate share of program funded units could potentially be made available to accommodate housing seekers on Halton's centralized waitlist for geared-to-income housing (indicating high demand for one-bedroom units for seniors and non-seniors across the region and family-sized units (two+-bedroom) in Milton and Halton Hills);
- The ultimate funding and financing plan for the project will have the potential to operate program funded units at or below 80% of the Local or Regional AMR (by number of bedrooms, as published annually by CMHC) for at least 30 years;
- The application will result in best-possible use of available external financing and funding opportunities for affordable / assisted housing.

4. The REOI approach

The REOI provides for a staged approach, based on the understanding that time and guidance may be needed to navigate potentially promising applications to comprehensive, construction-ready proposals that are consistent with Regional key priorities. The following stages are envisioned:

1. Initial REOI application review

Received applications will be assessed in accordance with the REOI eligibility requirements identified in section 10, to determine eligibility for REOI listing. If multiple applications are potentially eligible, the Region will use its absolute discretion to only select those applications that best meet the stated key priorities.

2. Initial report back

Selected eligible applicants will be invited for an exploratory exchange of information about the application and its potential to advance the application to a comprehensive proposal for government-assisted housing. Provided the applicant expresses a continued interest in being REOI listed, the Region will add the applicant to the list of potential REOI partners.

3. Engagement post REOI-intake

The nature and intensity of this stage is dependent on the project strengths and areas of improvement from a Regional perspective, and is intended to carry out the trajectory toward a comprehensive proposal. Each party may at any time decide to terminate the engagement, while the Region has the absolute discretion to determine if and when the exploratory nature of this stage could proceed toward formal funding negotiations aimed at formalizing a development schedule with a construction start on or before December 31, 2021 (subject to Council approval).

Halton Region intends to issue similar REOIs on an annual basis, or as needed. The list of REOI partners will be maintained by Halton Region until the next REOI is issued, whereby the Region, at its sole discretion, may extend the active listing of potential REOI partners.

5. Regional Concierge Outreach

Regional concierge outreach is available at any time to all interested parties, including non-applicants, selected applicants and applicants not selected for this list of REOI partners.

Regional concierge outreach is intended to provide guidance, tools and referrals as needed with regard to financial analytics, potential partnership arrangements, pathways to leverage Federal and Provincial funding programs, and options to adjust project components to optimize consistency with Regional key priorities.

It should be noted that if an applicant engages with Regional concierge outreach, the applicant remains the sole responsible party for any progress during the REOI stages.

Regional Concierge Contact Information:

Sarah Phillips, Senior Policy Analyst, Legislative & Planning Services

Email: s.phillips@halton.ca

6. Who Should Apply

Non-profits, housing co-operatives, supportive housing providers, private sector organizations and partnership initiatives that are planning to develop and operate purpose-built rental housing in Halton Region with all or part of the units operated at government-assisted rent levels are encouraged to apply by completing the Application Form attached as Appendix A to this document. Submissions must meet minimum criteria outlined in section 10, but ideally include more in-depth level of detail. While joint submissions are encouraged, it is also possible for non-profits, housing co-operatives, supportive housing providers and private sector developers to submit their application unilaterally with the intent to use the REOI initiative as an opportunity to arrive at a partnership arrangement.

If an applicant wishes to submit an REOI application for more than one (1) development, the applicant must submit a separate REOI application for each proposed development.

7. Submission Instructions

One (1) copy of the Appendix A – Application Form, plus any additional documentation as indicated, should be submitted as instructed in the Submission Deadline section below.

Refer to the Submission Document Checklist of Appendix A – Application Form for details of all additional documentation to be submitted with your application, as applicable.

8. Submission Deadline

Interested parties are invited to respond by completing the attached Appendix A - Application Form and submit it by email to:

Sharon Telfer, Purchasing Supervisor

Email: Sharon.Telfer@halton.ca

No later than 4:00pm on

TUESDAY, MARCH 31, 2020

9. Inquiries

Any questions related to the REOI must be received a minimum of five (5) working days prior to the submission deadline. Questions are to be directed to Sharon.Telfer@halton.ca. Any correspondence with regards to this REOI must be in writing via email. Questions received may be answered through addendum.

10. REOI Eligibility Criteria

REOI Eligibility Requirements		Comments and Priority Considerations
1. Organizational Background, Capacity, Experience and Partnership	<ul style="list-style-type: none"> General description of the organizational background, capacity and experience to develop and operate the project. If the application represents a partnership submission, this information must be included for all involved partners. Identify core-competencies of each partner and the rationale for this particular partnership. General description of the existing or envisioned composition of the development team for the project, including internal and external expertise / consultants to cover all required expertise to prepare and develop the project. 	<ul style="list-style-type: none"> It is preferred that one or more partners have direct experience with the development and operation of multi-residential rental housing with integrated access to support services. While joint submissions are encouraged, it is also possible for applicants to submit their application unilaterally with the intent to seek partnership through the REOI process. Halton Region may verify past and/or ongoing partnership performance issues.
2. Project Location	<ul style="list-style-type: none"> Project must be within Halton Region's Urban Area, and outside of the Employment Area, as specified in the Regional Official Plan. Projects not located in the Urban Area (regardless of stage) are ineligible for consideration. 	<ul style="list-style-type: none"> See Resource section for Regional Official Plan information. Projects are preferably located in well-connected communities (preferably designated for residential growth or intensification), near public transit, retail and other facilities / social infrastructure.
3. Ownership	<ul style="list-style-type: none"> Applicant(s) must provide evidence of current / future land ownership, indicating one of the following: <ul style="list-style-type: none"> Ownership of the project land; or Agreement of Purchase and Sale; or 30+ year lease agreement in place; or Signed offer to purchase or lease (not expiring within 12 months); or Statement or resolution of land donation (issued by the donor). 	<ul style="list-style-type: none"> Current deed, property tax bill or MPAC assessment in the name of the REOI applicant is acceptable Council minutes clearly identifying donation of land or letter from Municipal CAO would be acceptable All registered owners / leaseholders must be part of the application. While project partnership is a required outcome of this REOI, joint ownership is not required.

REOI Eligibility Requirements		Comments and Priority Considerations
4. Project Information	<ul style="list-style-type: none"> ▪ A preliminary outline of the project is required with a signed commitment that all units targeted for program funding will be purpose-built rental. ▪ The outline should include a tentative indication of the type and number of units (no less than six), envisioned target group and a preliminary description on how the applicant(s) envision(s) to address Regional priorities with regard to: <ul style="list-style-type: none"> ▪ Partnership arrangements and integrated access to a range of support ▪ Leadership and innovation regarding environmentally sustainable and universally accessible building design ▪ Mixed-income community setting and aligning the project with Halton's centralized waitlist 	<ul style="list-style-type: none"> ▪ Purpose-built rental units are registered on title as one block of units. As such, they cannot be sold or transferred individually. This is verified at title registration. ▪ A range of project types are potentially eligible, including new development, intensification and residential conversion. Projects not eligible: Secondary suites, Long Term Care, shelters / crisis care facilities, owner-occupied housing, and student residences. ▪ Leadership and innovation regarding sustainable building design could involve intent to adopt an industry standard such as: <ul style="list-style-type: none"> ▪ Leadership in Energy and Environmental Design (LEED) ▪ Net Zero certification ▪ Passive House or WELL Building Standard™ certified
5. Project Timing	<ul style="list-style-type: none"> ▪ Construction start must be on or before December 31, 2021. ▪ A tentative projection of anticipated steps and associated timelines toward construction start is required. ▪ Construction must be completed within two (2) years of construction start. 	<ul style="list-style-type: none"> ▪ Regional staff will assess feasibility of construction start before the stated deadline from a land-use planning perspective as part of the REOI intake. Projects requiring Local Official Plan Amendment are likely out of scope for this REOI unless written documentation submitted and verified during evaluation can support the ability to meet the construction start deadline of December 31, 2021.

REOI Eligibility Requirements		Comments and Priority Considerations
6. Financial Information	<ul style="list-style-type: none"> A general description of an intended financing plan and an approach to ongoing operating budgets within affordability requirements must be provided at a minimum. While detailed information is preferred, no exact or final projections are required at intake. The description should outline a reasonable approach to finance the project and ensure continued sustainable operations without operating subsidy. The description and supporting documents (if available) should include an attempt to factor in the following Regional priorities: <ul style="list-style-type: none"> An appropriate mix of program funded units and market units (where opportune) to stimulate mixed-income community settings; Program funded units set at or below 80% of the Local or Regional Average Market Rent (by number of bedrooms, for at least 30 years; Anticipated impact of building design features related to accessibility and environmental sustainability; Anticipated use (with some justification) of available federal and provincial financing and funding opportunities (e.g. CMHC's National Housing Strategy programs (Co-investment, SEED). 	<ul style="list-style-type: none"> Regional staff will perform an initial financial feasibility assessment as part of the REOI intake review. With regard to an appropriate mix of program and market units: Unless the project is exclusively targeted for fixed low-income client groups, at least 50% of the units are expected to be market units (and as such out of scope for program funding). Applications with program rents in perpetuity will be preferred. Average Market Rents (AMR) for 2020 are provided in the Resources section and should be used for estimating initial program rents.

The Application Form provided in Appendix A is based on criteria that must be met to qualify for REOI listing and subsequent exploratory exchange of information.

11. Use of Submissions

This REOI is issued for information-gathering and exchange purposes only, and is not intended to be a formal legally binding "Contract A" bidding process. It does not in any way create a binding relationship or obligation between the Region and the applicant. Any response to this REOI shall not be understood as a process directly leading to the execution of a contract with the Region. Submissions will be reviewed and used to assist the Region in determining any required next steps.

12. REOI Not to Limit Halton Region's Pre-existing Rights

This REOI will not limit any of Halton Region's pre-existing rights. Without limiting the generality of the foregoing, Halton Region expressly reserves the right, at its sole discretion, to:

- (a) Seek subsequent information or initiate discussions with any potential party, including potential parties that did not respond to this REOI;
- (b) Seize arising opportunities in the wake of this REOI to initiate negotiations toward potential funding arrangements with any potential party or parties, regardless of whether the potential party or parties responded to this REOI;
- (c) Contact a limited number of potential parties, which may include only those that responded to this REOI or may include potential parties that did not respond to this REOI;
- (d) Elect not to proceed with this REOI.

These expressly reserved rights are in addition to any and all other rights of Halton Region that existed prior to the issuance of this REOI.

13. Parties to Bear Own Costs

Halton Region will not be liable for any expenses incurred by an applicant, including the expenses associated with the cost of preparing responses to this REOI. The parties will bear their own costs associated with or incurred through this REOI process, including any costs arising out of, or incurred in, (i) the preparation and issuance of this REOI; (ii) the preparation and making of a submission; or (iii) any other activities related to this REOI process.

14. Accuracy of Responses

The applicant acknowledges that the information provided is, to the best of its knowledge, complete and accurate.

15. Submissions Will Not Be Returned

Except where set out to the contrary in this REOI or expressly requested in the applicant's submission, the submission and any accompanying documentation provided by an applicant will not be returned.

16. Confidential Information of Halton Region

All information provided by or obtained from Halton Region in any form in connection with this REOI either before or after the issuance of this REOI (i) is the sole property of Halton Region and must be treated as confidential; (ii) is not to be used for any purpose other than replying to this REOI; (iii) must not be disclosed without prior written authorization from Halton Region; and (iv) must be returned by the respondent to Halton Region immediately upon the request of Halton Region.

The applicant may not at any time directly or indirectly communicate with the media in relation to this REOI without first obtaining the written permission of Halton Region.

17. Disclosure of Information

The applicant consents to Halton Region's collection of information as contemplated under the REOI for the uses contemplated under the REOI. Information provided by an applicant may be released in accordance with relevant access to information and privacy legislation including primarily the *Municipal Freedom of Information and Protection of Privacy Act*, R.S.O. 1990, c. M.56, as amended ("MFIPPA"). The applicant agrees that any information provided in its application, even if it is identified as being supplied in confidence, may be disclosed pursuant to MFIPPA or as required by any other applicable law or by order of a court or tribunal. The applicant acknowledges that Halton Region may make public the name of any and all applicants.

18. Resources

The information/links in the table below may be helpful when completing the Appendix A – Application Form.

1.	Halton Region Official Plan																																						
2.	Official Plan Maps																																						
3.	Halton's Comprehensive Housing Strategy (with link to 2018 State of Housing Report)																																						
4.	CMHC Housing Market Information Portal																																						
5.	Province of Ontario Community Housing Renewal Strategy																																						
6.	CMHC National Housing Strategy (NHS) <ul style="list-style-type: none">▪ Co-Investment Fund▪ Rental Construction Financing▪ SEED Funding																																						
7.	Current CMHC Average market rents within Halton Region: <table><tr><th colspan="5">Average Market Rent for apartment units Applicable to 2020 (CMHC Rental Market Report, January 2020)</th></tr><tr><th></th><th>bachelor</th><th>one-bedroom</th><th>two-bedroom</th><th>three-bedroom +</th></tr><tr><td>Burlington</td><td>\$1,049</td><td>\$1,354</td><td>\$1,506</td><td>\$1,721</td></tr><tr><td>Halton Hills and Milton</td><td>\$834</td><td>\$1,117</td><td>\$1,290</td><td>\$1,665</td></tr><tr><td>Oakville</td><td>\$1,123</td><td>\$1,387</td><td>\$1,570</td><td>\$1,886</td></tr><tr><td colspan="5"></td></tr><tr><td>Halton Region</td><td>\$1,075</td><td>\$1,336</td><td>\$1,505</td><td>\$1,769</td></tr></table>				Average Market Rent for apartment units Applicable to 2020 (CMHC Rental Market Report, January 2020)						bachelor	one-bedroom	two-bedroom	three-bedroom +	Burlington	\$1,049	\$1,354	\$1,506	\$1,721	Halton Hills and Milton	\$834	\$1,117	\$1,290	\$1,665	Oakville	\$1,123	\$1,387	\$1,570	\$1,886						Halton Region	\$1,075	\$1,336	\$1,505	\$1,769
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APPENDIX A - APPLICATION FORM

Request For Expressions of Interest #REOI-002-20 to Develop Government-Assisted Rental Housing in Halton Region

Please complete this application form and associated documentation / information in as much detail as you have at this time. If the information is not available, please indicate N/A. If there is not enough room on the form, please attach and reference which section that supporting materials are associated with.

Applicant Information

Legal Name of Corporation / Applicant:		
Mailing Address:		
Authorized Representative:	Name and title	
Contact Information:	telephone and email	
Company Website address:		
Type of business entity:	<input type="checkbox"/> Private Sector Corporation <input type="checkbox"/> Non-Profit Corporation <input type="checkbox"/> Non-Profit Housing Co-operative	<input type="checkbox"/> Registered Charity <input type="checkbox"/> Other:
Is this application being made joint with any partner organization?	<input type="checkbox"/> Yes <input type="checkbox"/> No	

1. Organizational Background, Capacity and Experience

In separate document(s), please provide the following information:

An overview of housing (re)developments completed by your and/or your partner's organization over the last five (5) years, including size, location, tenure, target group, specific features and current status. Describe any specific difficulties that may have been encountered and how these were managed.

An overview of rental properties your and/or your partner's organization own and/or operate, and since when.

Where known, a list of your Project Team including any confirmed consultants, professionals (architect, engineer, builder) with details on their related experiences to this project

If you represent a Partnership or Joint Venture for the development of this project: a description of the legal nature of the relationship(s) and the roles and responsibilities of each party for this project and (if applicable) previous project(s).

Provide details of any Partnerships with other agencies or groups that you anticipate working on this project if applicable or known.

List of current Board of Directors, if applicable to your and your partner's organization (name, position on the board, length of tenure and occupational background).

Did your and/or your partner's organization ever receive funding from Halton Region?

☐ Yes ☐ No
 If yes, please include details in the document requested above

Does your and/or your partner's organization receive any operating funding from a Ministry?

☐ Yes ☐ No
 If yes, please include details in the document requested above

2. Project Location

Projects eligible for REOI listing must be within Halton Region's Urban Area, and outside of the Employment Area, as specified in the Regional Official Plan. Projects not located in the Urban Area (regardless of stage) are ineligible for consideration.

Location (municipal address):		
Closest major intersection:		
Current use (pre-development):	<input type="checkbox"/> Residential <input type="checkbox"/> Mixed Use <input type="checkbox"/> Commercial / Industrial	<input type="checkbox"/> Agricultural <input type="checkbox"/> Vacant Greenfield <input type="checkbox"/> Other:
Current zoning designation: (as per Zoning By-Law)		
Any issues regarding Environmental Status of the land / property site?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know If yes, please provide copies of available environmental reports (if any)	
Is this project located within Halton Region's Urban Area as specified in the Regional Official Plan	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Heritage Designation Status?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please include details	

3. Ownership

Applicant(s) must provide evidence of current / future land ownership, indicating one of the following:

- Ownership of the project land or an Agreement of Purchase and Sale; or
- a 30+ year lease agreement in place; or
- a signed offer to purchase or lease (not expiring within 12 months); or
- a statement or resolution of land donation (issued by the donor).

All registered owners / leaseholders must be part of the application. While project partnership is a required outcome of this REOI, joint ownership is not required.

Does your and/or your partner's organization currently own the land where the housing will be developed?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, provide most recent MPAC statement, indicating assessed value	
If your and/or your partner's organization do not own the land, what is the current status? Provide applicable evidence / legal agreement(s)	<input type="checkbox"/> Agreement of Purchase and Sale <input type="checkbox"/> Signed offer to purchase <input type="checkbox"/> Leasing the land Term: ____ years	<input type="checkbox"/> Signed offer to lease <input type="checkbox"/> Donation <input type="checkbox"/> None – no status

4. Project Information

The items below are intended to describe the envisioned purpose-built rental development (of no less than six (6) program units), (potential) target group(s) and alignment with Regional priorities regarding:

- Partnership arrangements and integrated access to a range of support services
- Leadership and innovation regarding environmentally sustainable and universally accessible building design
- Mixed-income community setting
- Unit occupancies through Halton's centralized waitlist

Envisioned land use:	<input type="checkbox"/> Residential <input type="checkbox"/> Infill Residential	<input type="checkbox"/> Mixed Use <input type="checkbox"/> Other:																																			
Type of development:	<input type="checkbox"/> New build <input type="checkbox"/> Conversion to residential	<input type="checkbox"/> Other:																																			
Anticipated Built-Form:	<input type="checkbox"/> Apartment - number of floors: ... <input type="checkbox"/> Townhouse	<input type="checkbox"/> Stacked townhouse <input type="checkbox"/> Other:																																			
Actual or potential scale and scope of the project:	<table border="1"> <thead> <tr> <th></th> <th>Market units</th> <th>Program units</th> <th>Total</th> <th>Average size (SF)</th> </tr> </thead> <tbody> <tr> <td>Bachelor</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>One-bedroom</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Two-bedroom</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Three-bedroom</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Four-bedroom</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>TOTAL</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>			Market units	Program units	Total	Average size (SF)	Bachelor					One-bedroom					Two-bedroom					Three-bedroom					Four-bedroom					TOTAL				
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In separate document(s), please provide the following information:																																					
If available, please provide a copy of concept drawings illustrating site plan context, elevation, floor plan, and other available projections of the development.																																					
Provide in as much detail as possible a description of design features and guidelines that are or may be considered for universal accessibility and environmental sustainability. You may use other development examples as point reference to illustrate the intentions.																																					
(potential) target group(s) and approach to housing:	Provide in as much detail as possible a description regarding: <ul style="list-style-type: none"> ▪ the intended target group(s) for the project; ▪ potential range of income within these group(s); ▪ support service provisions required / considered, and the envisioned partnership arrangement to deliver these services; ▪ use of non-residential floor area for that purpose; ▪ potential tenant pool and potential to source from Halton's centralized wait list for geared-to-income housing; ▪ how and why this housing initiative adds value to the community. 																																				
Are you using the REOI as an opportunity to arrive at a partnership arrangement?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, identify what partnership you are looking for and incorporate this in the description above.																																				

Purpose-built rental commitment:	<p><i>"We are interested in developing government-assisted housing units in Halton Region and acknowledge that</i></p> <p><input type="checkbox"/> all market and program units (or)</p> <p><input type="checkbox"/> all program units</p> <p><i>will be registered as purpose-built rental housing upon completion"</i></p>
	Signature Corporate Representative

5. Project Timing

Construction start must be on or before December 31, 2021. A tentative projection of anticipated steps and associated timelines toward construction start is required. Construction must be completed within two (2) years of construction start.

Have you been engaged in pre-consultation with the local municipal planning department already?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, when did this occur?	
Which planning approvals are required?	<input type="checkbox"/> Local Official Plan Amendment <input type="checkbox"/> Zoning By-law Amendment <input type="checkbox"/> Minor Variance	<input type="checkbox"/> Site Plan <input type="checkbox"/> Other..... <input type="checkbox"/> Don't know
Current planning applications status:		
Anticipated construction start:	<input type="checkbox"/> Spring 2020 <input type="checkbox"/> Summer 2020 <input type="checkbox"/> Fall/Winter 2020	<input type="checkbox"/> Spring 2021 <input type="checkbox"/> Summer 2021 <input type="checkbox"/> Fall/Winter 2021
Estimated Length of Construction; construction must be completed within two (2) years of construction start (# of months):		
In separate document(s), please provide a (tentative) development plan or overview of anticipated steps and associated timelines toward construction start.		

6. Financial Information

The description and supporting documents (if available) should include an attempt to factor in the following Regional priorities:

- An appropriate mix of program funded units and market units (where opportune) to stimulate mixed-income community settings;
- Program funded units set at or below 80% of the Local or Regional Average Market Rent (by number of bedrooms, for at least 30 years);
- Anticipated impact of building design features related to accessibility and environmental sustainability;
- Anticipated use (with some justification) of available Federal and Provincial financing and funding opportunities (e.g. CMHC's National Housing Strategy programs (Co-investment, SEED).

In separate document(s), please provide the following information:				
<p>Provide an outline of a financing plan and an approach to ongoing operating budgets within affordability requirements, including documentation to support MPAC Statement and Mortgage statement, if applicable.</p> <p>While detailed budget / pro forma information is preferred, no exact or final projections are required at intake.</p> <p>The description should outline a reasonable approach to finance the project and ensure continued sustainable operations without operating subsidy.</p>				
Have you prepared a preliminary capital budget?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please provide.			
Estimated total capital budget:				
Estimated amount of capital funding required:				
Estimated cost per unit and SF:				
Land Value for this project (MPAC, purchase price and/or appraised value)				
Is there a current mortgage on this land/property that will be developed?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, what amount?:.....			
Financing in place or approved for this project?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please Provide documentation to support.			
Owner equity contribution?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, what amount?:..... Describe:			
Have you applied for CMHC Seed Funding?	<input type="checkbox"/> Yes <input type="checkbox"/> No			
If you have not applied for CMHC Seed Funding, are you planning to?	<input type="checkbox"/> Yes <input type="checkbox"/> No			
Have or will you be applying for CMHC Co-Investment or Rental Construction Financing?	<input type="checkbox"/> Yes <input type="checkbox"/> No			
<i>If you have applied for any CMHC programs and/or have the information available to complete them, please include a copy of your application summary and/or self-assessment checklist with this application.</i>				
Have you prepared a preliminary operating budget?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please provide.			
Anticipated monthly rents:		Market units	Program units	Average Market Rent
	Bachelor			
	One-bedroom			
	Two-bedroom			
	Three-bedroom			
	Four-bedroom			

Submission Document Checklist

This checklist outlines additional required documentation to supplement a complete Appendix A – Application Form submission. Please use the check boxes to verify inclusion of the corresponding documentation, if applicable to your application.

Section 1. Organizational Background, Capacity and Experience	
<input type="checkbox"/>	If you represent a Partnership or Joint Venture for the development of this project include copy of any memorandum of understanding / agreement.
<input type="checkbox"/>	Include details if your and/or your partner's organization ever received funding from Halton Region
<input type="checkbox"/>	Include details if your and/or your partner's organization receive any operating funding from a Ministry?
Section 2. Project Location	
<input type="checkbox"/>	Any environmental reports if available (i.e. ESA Phase 1, 2, Record of Site Condition)
<input type="checkbox"/>	Heritage Designation Status document, if applicable
Section 3. Ownership	
<input type="checkbox"/>	Evidence of current/future land ownership of project site, as applicable
Section 4. Project Information	
<input type="checkbox"/>	Concept drawings illustrating site plan context, elevation, floor plan, and other available projections of the development.
<input type="checkbox"/>	Description of design features and guidelines that will or may be considered for universal accessibility and environmental sustainability. You may use other development examples as point reference to illustrate the intentions.
<input type="checkbox"/>	Description of the (potential) target group(s) for the project and approach to housing.
<input type="checkbox"/>	If you are using the REOI as an opportunity to arrive at a partnership arrangement, identify what partnership you are looking for
Section 5. Project Timing	
<input type="checkbox"/>	(Tentative) development plan or overview of anticipated steps and associated timelines toward construction start.
Section 6. Financial Information	
<input type="checkbox"/>	Three (3) years of audited financial statements for the primary applicant organization and any partner(s) for the project, and latest management letter from auditor (if any).

<input type="checkbox"/>	Documentation to support MPAC Statement and Mortgage statement, if applicable.
<input type="checkbox"/>	Documentation to support financing currently in place or approved for this project if available.
<input type="checkbox"/>	If available, proposed Capital Budget .
<input type="checkbox"/>	If available, proposed Operating Budget.
<input type="checkbox"/>	Documentation to support any Equity to the project.
<input type="checkbox"/>	If you have applied for any CMHC programs (i.e. SEED, Co-Investment, Rental Construction Financing) and/or have the information available to complete them, please include a copy of any letters of approval, your application summary and/or self-assessment checklist.