



**County of Wellington
Purchasing and Risk Management Services
74 Woolwich Street
Guelph, Ontario
N1H 3T9**

County of Wellington
Project CW2023-054
Request for Proposal
Development of Affordable Rental Housing

Closing Date: October 16, 2023
Time: 2:00:59 p.m.

Contact: Purchasing and Risk Management Services
E: purchasing@wellington.ca
F: 519.837.1909

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ELECTRONIC BID SUBMISSIONS shall be received by the Bidding System, no later than **2:00:59 p.m. on October 16, 2023**

for the development of affordable rental housing units for the Consolidated Municipal Service Manager (CMSM) area of Wellington and Guelph.

Questions related to this tender may be submitted via the Bidding System using the **Submit a Question** feature.

Proponents are cautioned that the timing of their Proposal Submission is based on when the Bid is **RECEIVED** by the Bidding System, **not** when a Bid is submitted by a Proponent, as Bid transmission can be delayed in an ***“Internet Traffic Jam”*** due to file transfer size, transmission speed, etc.

For the above reasons, the Owner recommends that Proponents allow sufficient time to upload their Proposal Submission and attachment(s) (if applicable) and to resolve any issues that may arise. The closing time and date shall be determined by the Owner’s Bidding System web clock.

The Bidding System will send a confirmation email to the Proponent advising that their bid was submitted successfully.

Late Proposals shall not be accepted by the Owner’s Bidding System.

To ensure receipt of the latest information and updates via email regarding this bid or if a Proponent has obtained this Proposal Document from a third party, the onus is on the Proponent to create a Bidding System Vendor account and register as a Plan Taker for the bid opportunity at the at www.bidsandtenders.ca.

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STATUTORY FORM OF DECLARATION

We certify that: -

The party executing this document is authorized to sign the same.

The matters set forth in the Request for Proposal are correct.

This Request for Proposal is made without any connection, comparison of figures or arrangement with or knowledge of any other Corporation, Firm or Person making a Request for Proposal for the same work.

No member of the Council and no officer or employee of the County of Wellington is, will be, or has, become interested, directly or indirectly, as a Contract in Party, Partner, Stockholder, Surety or otherwise in, or in the performance of the Contract, or in the supplies, work, or business to which it relates, or in any portion of the profits thereof, or in any of the money to be derived therefrom.

This Request for Proposal will remain open for acceptance for a period of 90 (ninety) days after opening of Request for Proposals and the County of Wellington may at any time within this period accept this Request for Proposal.

Name of firm:

Signing Officer's Signature:

Declared before me this day of 2023

OVERVIEW

PROGRAM REQUIREMENTS & INFORMATION

Introduction

On April 17, 2019, the County of Wellington was advised by the Ontario Minister of Municipal Affairs and Housing that new federal and provincial funding was being delivered in Guelph and Wellington under the National Housing Strategy and Community Housing Renewal Strategy. The current programme supporting these initiatives is the Ontario Priorities Housing Initiative (OPHI). Funding under OPHI could be used towards homeownership loans, renovation loans/grants, rent supplements, housing allowances, housing support services, and the development of affordable rental housing in the community.

The County of Wellington is requesting responses to this Request for Proposals (RFP) from non-profit, co-operative, municipal, and charitable parties wishing to create new affordable rental housing for low and moderate income households within the Service Manager area. Responses to this RFP received by the County of Wellington will be considered for funding through the OPHI programme. Based on proposals received, the County of Wellington may commit up to \$XXXXXXX.00 of funding towards the development of new affordable rental housing in Guelph and Wellington, based on planned allocations over the 2023-2024 period.

Process

If the County is satisfied that a project has merit, is viable and will meet the needs of the community, it may include the proposed project in its Investment Plan. A selected project proposal would be submitted to the Ministry of Municipal Affairs and Housing (MMAH) for consideration. County Council approval for providing funding to the project is also required.

If a project is selected and approved for funding, it will receive a Conditional Letter of Commitment (CLC) from the MMAH. The CLC confirms MMAH approval of the project and outlines the steps that must be taken prior to the proponent and the County of Wellington entering into a Contribution Agreement. The Contribution Agreement will set out legal obligations and reporting requirements for the project. The successful proponent will need to sign a Service Manager Contribution Agreement and confirm registration of security no later than December 15, 2023.

Construction must begin within 120 days of the Contribution Agreement signing date and must be completed within 4 years.

Eligibility

This RFP invites proposals to create new affordable rental housing units in the CMSM service area of Wellington and Guelph that meet the CMSM and the Provincial guidelines. Non-profit, co-operative, municipal, and charitable proponents are invited to submit proposals with a ready start (see requirements below), which includes the ability of a proponent to sign a Service Manager Contribution Agreement no later than December 15, 2023.

All proposals will be required to meet the criteria described within this RFP, which briefly includes the following:

Eligible Projects:

- New construction, including additions and extensions;
- Acquisition and, where required, rehabilitation of existing residential buildings to maintain or increase the affordable rental housing stock;
- Conversion of non-residential buildings or units to purpose-built rental buildings/units;
- Social housing redevelopment which involves building new affordable rental units/additions on social housing sites is eligible provided that the appropriate ministerial or Service Manager consent, as applicable, is obtained as per the *Housing Services Act, 2011*; or
- Proponents who wish to develop congregate living buildings (rooms with shared living spaces) for supportive housing may be eligible for programme funding and should provide a rationale in order to receive funding.

Ineligible Projects:

- Projects proposed by private sector proponents without non-profit/municipal/co-operative partnership;
- Secondary suites in owner-occupied housing;
- Nursing and retirement homes;
- Shelters and crisis care facilities;
- Owner-occupied housing; or
- Student residences.

Ready Start Requirements

Only proposals that meet the ready start requirements as outlined below will be reviewed by the evaluation team.

Ready Start Requirements:

- Ability to sign a Contribution Agreement and confirm registration of security no later than December 15, 2023;

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- Ability to start construction within 120 days from signing Contribution Agreement and be completed within four years;
- Evidence of land ownership;
- Evidence of site plan, zoning and servicing approvals, and building permit (including completion of all LPAT hearings and planning and zoning processes);
- The project meets the affordability requirements;
- Financial viability has been proven, as confirmed by the Service Manager (for capital and operating);
- Meet Planning and Design requirements, and must be reasonable in size for self-contained units; and,
- Be designed to maximize achievable reductions in energy consumption and greenhouse gas emissions to minimum requirements;
- Have an occupancy plan in place to ensure units will be occupied in a timely manner;
- Proponents must demonstrate the capacity and financial capability to undertake the proposed development, and must be able to sustain this project over the term of the agreement.

Service Manager Preferences

As there are typically limited funds available for new rental development, the County may give preference to experienced respondents that can deliver units within required timeframes.

Service Manager preferences include submissions that:

- Address needs identified in “A Place to Call Home, A - Five Year Update”. The plan is included as Attachment D;
- Offer a range of supportive housing options for residents with complex needs due to aging, disabilities, mental health issues and addictions;
- Have a site with required zoning in place and have short time frames to start construction;
- Propose small to mid-sized projects;
- Ensure the employment of apprentices in the residential housing sector;
- Have rents below the stated maximum monthly rate and/or that include some or all utilities in the monthly rent;
- Incorporate energy efficiency measures, positive design, and barrier free or visitable features that exceed minimum building requirements;
- Commit to affordability for longer than 20 years;
- Incorporate best practices, as noted in the “Affordable Rental Housing Development Resource Guide”. The guide is included as Attachment E;
- Have contributions by others to be used in partnership with OPHI funding;

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- Have submitted a Seed Funding application to CMHC; and,
- Have engaged CMHC to explore funding through the National Housing Co-Investment Fund.

Sample

PROPOSAL REVIEW PROCESS

PROJECT EVALUATION

Proposals will be evaluated by an evaluation team. By responding to this RFP, proponents acknowledge that the evaluation team is solely responsible for recommending the successful proponents to the CMSM, with County Council making the final decision. Only proposals that meet the ready start requirements as outlined in this RFP will be evaluated by the evaluation team.

Evaluation Criteria

The evaluation criteria will be based on the following:

EVALUATION CRITERIA	MAXIMUM POINTS
Business Plan & Financial Viability	30
Proponent Qualifications & Partnerships	20
Development Plan/Design & Target Groups	20
Milestones & Ready Start Status of proposal	30
Maximum Points	100

The CMSM will review all projects submitted to them and select projects that are financially viable and meet all the programme requirements for funding.

The CMSM recommended proposal(s) require the following approvals including:

- County of Wellington proposal approval if located in County of Wellington area, including any local incentives to the proposal;
- City of Guelph proposal approval if located in the City of Guelph area, including any local incentives to the proposal, and approval for an indemnity agreement between the City of Guelph and the CMSM;
- County of Wellington approval as CMSM, subject to a Provincial Conditional Letter of Commitment to the proponent;
- Provincial approval to enter into a Service Manager Contribution Agreement; and,
- County Council Approval.

DEVELOPMENT CRITERIA

PLANNING AND DESIGN REQUIREMENTS

All projects are subject to normal local and provincial planning and building code requirements, and related regulations. All proposals will require the appropriate approvals to be in place and is or will be compliant with all requirements.

Preference will be given to projects that demonstrate enhanced energy efficiency and accessibility features, and meet the local municipal planning objectives and design requirements, in addition to basic site specific development requirements.

Planning and development requirements

The proponent should consult with the local municipality for planning and other building requirements prior to submitting their proposal. The successful proponent will be responsible for completing and obtaining all necessary planning and development approvals in a timely manner and will be expected to work collaboratively with local municipal staff to achieve the same.

Unit sizes

The following unit sizes should be considered average sizes and will be reviewed in evaluating the submissions. These unit sizes are guidelines and not requirements.

Unit Type	Bachelor	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Minimum	40.0 m ²	48.7 m ²	60.4 m ²	83.6 m ²	102.2 m ²
Average	41.8 m ²	55.0 m ²	67.4 m ²	92.9 m ²	109.2 m ²

Non-Residential Space

Under the Rental Housing component of OPHI, up to 30% of the total available space may be used for non-residential purposes, including common areas and services used directly with the residential accommodation such as office space for support service providers.

Accessibility and Barrier-Free Units

Proposals must meet local accessibility guidelines.

Proponents are encouraged to include barrier-free units with accessible building features. Examples of these features may include ramps, grab bars, wider doorways and/or lower cabinets, as well as provisions for persons with hearing and vision impairments, storage for accessible equipment such as scooters, and other alterations.

Energy Efficiency and Building Design

Several energy efficient measures are now required in projects funded under the New Rental Housing component. Recommended projects shall maximize achievable reductions in energy consumption and greenhouse gas emissions relative to minimum requirements (i.e. meet or exceed the current National Energy Code and Ontario Building Code requirements for new construction).

Suite meters

All units must have suite meters installed. The Energy Consumer Protection Act, 2010, and Ontario Regulation 389/10 set out the rules for suite meter installation.

Environmental Assessment

Projects funded are subject to the *Canadian Environmental Assessment Act* (CEAA), and therefore prior to entering into a SM Contribution Agreement, successful proponents will be required to confirm that their project proposal does not impose adverse impacts that cannot be mitigated.

AFFORDABILITY REQUIREMENTS

RENTAL AFFORDABILITY REQUIREMENTS

There are various key affordability requirements, including affordable market rents, maximum income limits, rent supplement, targeted tenant types and selection, affordable rent duration and rent increases, etc.

Affordable Market Rents

Affordable rents will average at or below 80% of the Canada Mortgage and Housing Corporation's (CMHC) Average Market Rent (AMR) for the area, as determined by the County.

The average monthly rents for apartment buildings should be no greater than the following amounts (2022 rates):

Type of Unit	2022 Average Market Rent	Maximum Monthly Rent (80%)
Bachelor	\$989	\$791
One bedroom	\$1,324	\$1,059
Two bedroom	\$1,490	\$1,192
Three bedroom	\$1,504	\$1,203
Four bedroom	\$1,504	\$1,203

Rent increases after initial occupancy must be made in accordance with rules established in the Residential Tenancies Act, 2006 (RTA). New rental buildings (no part of which was occupied for residential purposes on or before November 15, 2018) are technically exempt from RTA rent increase guidelines, but are subject to terms and conditions in the OPHI Transfer Payment Agreement. The Agreement states that rent increases are required to follow the RTA rent increase guidelines, but must still remain at or below the CMHC AMR for the area, and that average rents for the project must not exceed 80% of CMHC AMR.

Maximum Income Limits

Income limits establish the maximum amount of gross annual income that households may have to be eligible to initially occupy a unit funded under the programme. To ensure that any Affordable Rental Housing units are made available to low to moderate income households, gross tenant household income targets will be established by the County of Wellington under the Municipal Facility By-Law and/or the Service Manager Contribution Agreement.

Successful Proponents will be required to check incomes for prospective tenants at initial occupancy during rent up and for ongoing vacancies. To be eligible prospective tenants must not exceed the maximum amount of gross annual income.

Rent Subsidy Units

Funds may be available for rent subsidy agreements with the successful proponent(s) throughout the County of Wellington CSM. The proponent may indicate a target number of rent subsidy units. The CSM may enter into a separate rent supplement agreement with the proponent should funding be available. Tenants in receipt of rent supplement subsidies will be required to meet income and household rules to remain eligible for the rent subsidies. Tenant selection may be from the CSM or supportive agency's waiting list, and must meet CSM Centralized Waiting List eligibility criteria, with exceptions to be approved by the CSM administrator.

OPHI Target Groups

Projects funded under the OPHI Rental Housing component must target occupancy from the eligible target groups provided. These include, but are not limited to:

- Seniors
- Persons with disabilities
- Indigenous peoples
- People with mental health or addictions issues
- Survivors of domestic violence
- Those who are homeless or at risk of homelessness
- Recent immigrants
- Working poor
- Veterans
- Racialized groups

The tenant groups for the affordable housing programme must also be on, or eligible to be on, social housing waiting lists.

A Project developed under this proposal will adhere to the CSM's Occupancy Standards as outlined in Attachment B. These standards determine the size and type of unit in respect of which a household can occupy under the OPHI programme.

Successful proponents will be required to submit a comprehensive tenant selection plan satisfactory to the CSM detailing procedures to ensure a fair and open process in compliance with the Contribution Agreements, and must agree to maintain a fair and open rental practice.

For example, proponents cannot rent Affordable Rental Housing Units to themselves, their shareholders or directors or to any individual not at arm's length from the Successful Proponent or its shareholders or directors.

Affordable Rent Duration & Permitted Rent Increases

The minimum period of affordability set by the CSM is twenty (20) years, in addition to a five (5) year phase-out period. The phase-out period of five (5) years will ensure that at the end of

the period of affordability, current tenants will be protected. During the phase-out period, vacant units may be rented without regulatory restriction.

Years 1-20 - Initial Affordability Period (20-year minimum)

Occupied and vacant units have rent increases governed by *Residential Tenancies Act (RTA) 2006*, or any successor legislation, but limited to an average of 80% of AMR.

5 Year - Phase-out Period

Units have rent increases governed by the RTA as per the initial affordability period, but limited to 100% of AMR. After the 5year phase-out period - Programme restrictions on rent increases no longer apply to any unit unless otherwise required by the RTA.

FUNDING DELIVERY

CAPITAL FUNDING COMPONENT

Funding assistance for affordable rental housing under this RFP is being offered through the Ontario Priorities Housing Initiative (OPHI) Rental Housing component.

The OPHI Rental Housing component will fund up to 75% of the pro-rated share of the capital costs of affordable units. Total capital costs include land, financing, hard (construction) and soft costs less any HST rebates. To encourage the development of family-sized units, per unit funding caps have been eliminated under the OPHI Rental Housing component.

Projects may include both affordable units and market units, but only units with rents that meet affordability requirements will be eligible for funding.

FUNDING ASSISTANCE AND FINANCIAL REQUIREMENTS

Funding is in the form of a long-term forgivable capital loan to be secured against the property. The housing created must remain affordable for at least 20 years before the loan is forgiven. Preference may be given to proposals that indicate rents will remain affordable for more than 20 years.

Funding will be advanced during the development and construction phase of the project in three installments, assuming all required documentation has been received by the County of Wellington in a timeframe and manner as prescribed in the Contribution Agreement:

- **50% after signing of the Contribution Agreement*** between the proponent and the County of Wellington, registration of security, 1st available building permit and confirmation of construction start provided by the proponent in a manner identified by the County of Wellington.
- **40% at completion of structural framing*** upon submission of a certificate confirming completion of structural framing (for new construction) or documentation confirming fifty percent completion for acquisition and rehabilitation projects (letter from architect or planning consultant is acceptable).
- **10% at confirmation of occupancy*** upon submission of an initial occupancy report and confirmation of Employment of Apprentices Report and submission of an updated capital cost statement in a form acceptable to the Ministry.

(*Proponents must allow for a delay in funding installment payments made by the County of Wellington to the proponent, as County staff will need to confirm and communicate the funding milestones with MMAH before funding will be advanced to the County of Wellington.

Once released to the County of Wellington, the funds will then be able to be forwarded to the proponent)

Proponents must apply directly to the local municipality for any municipal incentives other than the required municipal incentive for property tax class rates. Projects that include capital and operating funding from other government agencies or other sources are expected to have this funding confirmed within 60 days of the proposal submission date.

Funding assistance and allotment to successful proponents will also be subject to recommendations made by the CMSM and final approval by the CMSM, Province and local municipalities.

In order to obtain financial assistance under this RFP, successful proponents will be required to enter into a Service Manager Contribution Agreement.

Full details of the successful proponent's obligation to make Affordable Rental Housing Units available will be established in the Contribution Agreement.

Key Proponent Financing and ownership responsibilities

Financing is a responsibility of the proponent for project pre-development costs, construction, on-going mortgage financing and operating. The proponent is required to provide proof of financing of 25% or more to address the total capital costs of the project, and must sustain break-even operations for the term of the agreements.

Equity Contributions

The following requirements apply to projects approved under the Rental Housing component of the OPHI programme:

- minimum 4% equity must be provided for projects sponsored by partnerships between private companies and non-profit organizations
- no equity contribution is required for projects sponsored by non-profit or co-operative housing organizations to encourage participation by these groups in the programme
- Please note that private lenders may have additional equity requirements.

It is recommended that all projects obtain CMHC insurance for the first mortgage. However, there is the option to waive the CMHC mortgage insurance requirement and seek alternative loan financing arrangements, at the discretion of the lender and the County of Wellington.

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Proponents should contact CMHC to discuss details of their project to determine if they are eligible for any fee reductions as an affordable housing project.

Proponents must have secured a site and verify their interest in the land. Land can either be owned outright or under option to purchase. If there is an option to purchase a site, the expiry date must not exceed a reasonable time period, as determined by the CMSM after the execution of the Service Manager Contribution Agreement. Proponents must submit proof of ownership as applicable.

Proponents must demonstrate financial capacity and capability. A development budget including capital costs and financing, and operating budget submissions are required. A Property Management plan must be submitted. Previous or current Audited financial statements of the corporation will be required. If a project submitted includes a mixture of affordable and market units, the budgets submitted must include a full breakdown of the entire project's development (construction/land/soft costs) costs and ongoing operating budget implications.

If a portion of the development is slated to be made up of condominium units, submissions must include an explanation regarding the proponent's intentions related to the County's mortgage being secured against the whole of the property and how the mortgage would operate for the term of the agreement, including any proposals for partial discharge.

The proponent shall provide the CMSM within 5 months of the end of construction a final capital cost audit, maintain records and provide ongoing reporting in a form acceptable to the CMSM.

SUBMISSION REQUIREMENTS

READY START REQUIREMENTS

As a reminder, only proposals that meet the ready start requirements as outlined in this RFP will be evaluated by the evaluation team.

REQUIRED CONTENTS

Request for Proposals must include all RFP signed documents and be no longer than 25 pages (excluding support documents which can be included in appendices of **Attachment A: Project Information Form Package (General Information Form and Forms 1-15)**, which is a required attachment to the proposal) and must include the following information:

- Name of the respondent and the key contact information - phone number, fax number, mailing and e-mail addresses;
- The respondent's experience in developing and managing affordable rental housing including examples;
- Three professional references for past projects. They must include name, position, organization, and telephone number;
- Description of the professional team: financial, legal, architect, etc.;
- Location/address of the proposed site, if known;
- Information related to zoning of the site, including any information needed for rezoning/minor variances, if available;
- The environmental status of the land. Include a copy of a Phase 1 Environmental Assessment, if completed;
- Initiatives/activities to promote and/or support the use of apprentices during construction, if applicable;
- Number, type and size of units offered by the proponent;
- Proposed rents and whether utilities are likely to be included;
- A preliminary capital budget and, if applicable, an operating budget;
- Mortgage financing details (if known); and
- Completed Attachment A: Project Information Form Package (General Information Form and Forms 1-15) as a proposal summary.

ADMINISTRATION

RIGHTS RESERVED BY THE COUNTY OF WELLINGTON

The County reserves the right to accept or reject any or all proposals, including the lowest proposal, and/or to reissue the RFP in its original or revised form.

The County further reserves the right to cancel this RFP at any time, without notice and without any penalty or cost to the County. This RFP and the resulting proposal should not be considered a commitment by the County to provide funding and/or enter into any contract with any proponent.

There will be no payment to proponents for work related to and material supplied in the preparation, presentation and evaluation of the RFP response nor for the contract negotiations, whether they are successful or unsuccessful.

The County is not liable for any costs incurred by the proponent in the preparation of their response to the RFP or selection interviews, if required. Furthermore, the County shall not be responsible for any liabilities, costs, expenses, loss or damage incurred, sustained or suffered by any proponent, prior or subsequent to, or by reason of the acceptance, or non-acceptance by the County of any proposal, or by reason of any delay in the acceptance of the proposal.

The County reserves the right to request proponents to:

- Address specific requirements not accurately covered in their initial submissions; and
- Clarify information in the Request for Proposal.

All documents, notes and materials produced in connection with this project shall become the property of the County and the County may use such of them, as it deems advisable.

The County reserves the right to share with City of Guelph staff any affordable rental housing proposal submitted in response to this RFP, which shows intent to develop a project within the City of Guelph.

The County of Wellington reserves the right to enter into detailed negotiations with potential proponents based on the Request for Proposals submitted.

The County of Wellington reserves the right to administer funding in its absolute discretion.

TERMINATION OF RFP

The County reserves the right to cancel this RFP at any time, without any penalty to the County. Further, any offer submitted pursuant to this RFP must comply with the ready start requirements

listed above including compliance with any processes outside of the proponent's control and is also subject to the approval of County Council and Ministry of Municipal Affairs and Housing.

FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY

The information submitted in response to this RFP will be treated in accordance with the relevant provisions of the *Municipal Freedom of Information and Protection of Privacy Act* (MFIPPA). The information collected will be used solely for the purposes stated in the RFP. The proponent does, by the submission of a proposal, accept that the information contained in the proposal will be treated in accordance with the process set out in the RFP. Proponents should clearly indicate in their submission which parts, if any, are exempt from disclosure under MFIPPA.

STATUS OF PROPONENT

The successful proponent acknowledges and agrees this RFP is in no way deemed or construed to be an Agreement of Employment. Specifically, the parties agree that it is not intended by this RFP that the successful proponent is to be an employee of the County for the purposes of the Income Tax Act, the Canada Pension Act, the Employment Insurance Act, the Workplace Safety and Insurance Act, the Occupational Health and Safety Act, the Pay Equity Act, or the Health Insurance Act, all as amended from time to time, and any legislation in substitution therefore.

FOLLOW UP AGREEMENTS

Mechanisms to ensure delivery of the programme as outlined in this RFP and subsequent discussions will need to be defined in agreements between the successful proponent and the County of Wellington.

ASSIGNMENT

The successful proponent will not make any assignment or subcontract any interest in this RFP or the rights and responsibilities under it without the written consent of the CMSM.

NO OBLIGATION

Proponents are reminded that until City and County Councils have approved the form and substance of the Contribution Agreements (including the County of Wellington Housing Facility Agreement) as negotiated by the City and County staff and authorized their execution, and the Agreements have been executed by the City and the County, the County and City have no obligations of any kind, direct or indirect, to proponents in respect of this RFP.

APPENDIX

ATTACHED DOCUMENTS

The following documents are intended as a resource for respondents interested in developing an RFP for consideration. They outline core requirements, community goals, programme guidelines and provide practical information regarding the affordable housing development process.

- Attachment A: **Project Information Form Package ***Required Attachment to Proposal*****

The project information form package (General Information Form and Forms 1-15) is a group of forms that break down some of the key points to a proponent's proposal. These documents will need to be completed and attached to the proponent's RFP submission.

- Attachment B: **Occupancy Standards**

County of Wellington Housing Services local policy - Occupancy Standards.

- Attachment C: **Ontario Priorities Housing Initiative (OPHI) – April 1, 2023 Programme Guidelines – Rental Housing Component**

The Rental Housing Component of the OPHI Programme Guidelines have been attached to this Request for Proposals for the proponent's review and consideration while developing their RFP submission. These are the guidelines developed by the Province for the delivery of this funding.

- Attachment D: **A Place to Call Home: A 10-year Housing and Homelessness Plan for Guelph Wellington (HHP) – 5 Year Update**

This document includes a five-year-review and sets the groundwork from now until 2024 by updating our community's goals and targets for developing appropriate, safe and affordable housing in Guelph Wellington. The goals and targets identified in the HHP will help to inform the decision making process when awarding any future allocations of capital funding to a project.

- Attachment E: **Affordable Rental Housing Development Resource Guide**

This document was updated in 2021 and is made available by the County of Wellington as a resource to individuals and groups wanting to develop, build and operate affordable rental housing. Included in this guide are practical considerations that highlight specific topic areas and the development process more fully.

Attachment A: Project Information Form Package

Form 8: Project Budget and Funding Worksheet

a) Proposed Capital Budget

PROPOSED DEVELOPMENT/CONSTRUCTION COSTS	Dollar Amount
Purchase price (includes land acquisition costs and/or acquisition of existing building)	
Title fees and land transfer tax	
Environmental/ Geotechnical site assessments Surveys	
Site upgrade (site preparation/ clean-up/ remediation)	
Survey	
Appraisal costs	
Other land costs:	
Legal fees - closing/ other than land	
Planning approvals	
Fees for Site plan, grading plan, park dedication	
Building permit fees	
Development charges	
Development consultant /administration expenses	
Architect/ Engineers (may include all design consultants)	
Insurance during construction	
Taxes during construction	
Lender's legal fees including title insurance fees	
CMHC application fees/ premiums/ insurance fees	
Interest during construction	
Other (Audit & GST Appraisal)	
Construction or Renovation costs (includes servicing costs)	
Kitchen appliances	
Furnishings and office equipment and laundry if applicable	
Landscaping, paving/hard surfaces, outdoor amenities	
HST	
Contingency	
TOTAL CAPITAL COSTS	\$0

b) Proposed Project Funding

Funding Sources	Project total
1. Proponent mortgage financing	
2. Proponent equity - Source	
3. Proposed affordable unit funding	
*Reminder - Per unit funding is not to exceed 75% of capital costs.	
4. Other contributions – specify sources	
Total project financing	\$0

Attachment A: Project Information Form Package

Form 8: Budget Form and Funding Worksheet

c) Proposed 5 Year Annual Operating Budget

Revenue (Rental Revenue Plus Non-Rental Revenue)											
Affordable Rental Revenue											
Bdrm type	# of units	Year 1		Year 2		Year 3		Year 4		Year 5	
		Mo. rent	Ann. Rent	Mo. rent	Ann. Rent	Mo. rent	Ann. Rent	Mo. rent	Ann. Rent	Mo. rent	Ann. Rent
Bach			\$0		\$0		\$0		\$0		\$0
1 bdrm			\$0		\$0		\$0		\$0		\$0
2 bdrm			\$0		\$0		\$0		\$0		\$0
3 bdrm			\$0		\$0		\$0		\$0		\$0
Vacancy LOSS (record as a negative #)			\$0		\$0		\$0		\$0		\$0
Total Affordable Rental Revenue		\$0		\$0		\$0		\$0		\$0	
Market Rental Revenue											
Bdrm type	# of units	Year 1		Year 2		Year 3		Year 4		Year 5	
		Mo. rent	Ann. Rent	Mo. rent	Ann. Rent	Mo. rent	Ann. Rent	Mo. rent	Ann. Rent	Mo. rent	Ann. Rent
Bach			\$0		\$0		\$0		\$0		\$0
1 bdrm			\$0		\$0		\$0		\$0		\$0
2 bdrm			\$0		\$0		\$0		\$0		\$0
3 bdrm			\$0		\$0		\$0		\$0		\$0
Vacancy Loss			\$0		\$0		\$0		\$0		\$0
Total Market Rental Revenue		\$0		\$0		\$0		\$0		\$0	
Non-Rental Revenue - Parking											
	# of units	Year 1	Year 2	Year 3	Year 4	Year 5					
Affordable Unit Parking											
Market Unit Parking											
Total Parking Revenue		\$0	\$0	\$0	\$0	\$0					
Non-Rental Revenue - Other											
		Year 1	Year 2	Year 3	Year 4	Year 5					
Laundry											
Interest											
Total Other Revenue		0	0	0	0	0					
Total Revenue		\$0	\$0	\$0	\$0	\$0					

Attachment A: Project Information Form Package

Form 8: Budget Form and Funding Worksheet

Shelter Expenses (Operating Costs Plus Fixed Costs)

Operating Costs

	Year 1	Year 2	Year 3	Year 4	Year 5
Maintenance Wages and Benefits					

Maintenance Materials and Services	Year 1	Year 2	Year 3	Year 4	Year 5
Building and Equipment					
Elevator					
Electrical Systems					
Heating, Air and Plumbing					
Grounds					
Painting					
Waste removal					
Security					
Other					
Total	\$0	\$0	\$0	\$0	\$0

Utilities	Year 1	Year 2	Year 3	Year 4	Year 5
Hydro – res. areas					
Hydro – common area					
Heating – common area					
Heating – res.units					
Water – common area					
Water – res area					
Total	\$0	\$0	\$0	\$0	\$0

Administration	Year 1	Year 2	Year 3	Year 4	Year 5
Salaries, Wages & Benefits					
Management Fees					
Materials and Services (Office)					
Other - Audit					
Total	\$0	\$0	\$0	\$0	\$0

Other	Year 1	Year 2	Year 3	Year 4	Year 5
Insurance					
Bad Debts					
Total	\$0	\$0	\$0	\$0	\$0

Total Operating Costs	\$0	\$0	\$0	\$0	\$0
------------------------------	------------	------------	------------	------------	------------

Attachment A: Project Information Form Package

Form 8: Budget Form and Funding Worksheet

Shelter Expenses (Operating Costs Plus Fixed Costs)

Fixed Costs

	Year 1	Year 2	Year 3	Year 4	Year 5
Municipal Taxes					
Principal and Interest Mortgage payments					
Replacement Reserves					
Contingency (10%)					
Other					
Total Fixed Costs	\$0	\$0	\$0	\$0	\$0

Total Shelter Expenses	\$0	\$0	\$0	\$0	\$0
-------------------------------	------------	------------	------------	------------	------------

Excess (deficiency) of Revenue over Expenses	\$0	\$0	\$0	\$0	\$0
---	------------	------------	------------	------------	------------

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Attachment A:

PROJECT INFORMATION FORM PACKAGE

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Attachment A: Project Information Form Package

General Information Form

Project Address:

Owned Option to purchase Other _____

Municipal Street address: _____

Legal Address: _____

Legal Incorporated Name of Proponent: _____

Incorporation Number: _____ Charitable Number: _____

Proponent Address and Contact Information: _____

Phone: _____ Fax: _____ Email: _____

Proponent Type:

private sector municipal non-profit co-operative partnership
private non-profit charitable corporation municipality other

* If partners are involved, please provide details in Form 7 Business Plan section.

Project Information

Total number of units: _____

Is it 100% affordable rental: Yes No

Total number of affordable funded units: _____

Type of Construction: Apartment Townhouse/ Row Other _____

Property area: _____

Building size (if applicable): #stories _____ **Area:** _____

Zoning: Current _____

Proposed: _____

Affordability Term (years): _____

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Client Type

Specify #: Family Seniors Single Other _____
Supportive Community Partners Mental Health Physical Victims of Domestic Violence
Support funding: Yes No Specify: _____

Project Team:

Architect: _____
Project Development: _____
Contractor: _____

Proposed Construction Start Date: _____
Proposed Construction Completion Date: _____
Anticipated First Occupancy Date: _____

Details for Affordable Rental units -

	Number of Affordable Units		Affordable Rents (80% of 2022 AMR)	Proposed unit size (same or specify the size if less)
	Rents at 80% of AMR	Rent Supplement Units		
Bachelor apartment			\$791	
1 Bedroom Apartment			\$1059	
1 Bedroom Apt. Accessible			\$1059	
2 Bedroom Apartment			\$1192	
2 Bedroom Apt. Accessible			\$1192	
3 Bedroom Apartment			\$1203	
4 Bedroom Apartment			\$1203	
Total				

Note: Contact CMSM for other unit sizes/ affordable rents

Mortgage financing

Name of lender: _____
Proponent Equity: Specify type and amount _____

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Attachment A: Project Information Form Package

Form 1: Application Proposal Submission Checklist

I/We hereby submit our proposal application for consideration under the terms, conditions and provisions outlined in this RFP. All supporting documentation must be provided at time of submission. Enclosed herewith as part of our submission are responses to all mandatory requirements, including:

ITEM	INCLUDED	COMMENT
Application Form		
Form 1: Submission Checklist		
Form 2: Mandatory Eligibility Checklist		
Form 3: Form of Offer		
Form 4: Local Planning Department Proposal Review Form		
Form 5 and 6: Local Municipal Incentives Proposal Review Form (Submit either Guelph form 6 or Wellington form 5)		
Form 7: Business Plan (all information requested including proof of Canadian or Ontario incorporation and concept or actual drawings)		
Form 8: Project Budget and Funding Worksheet - Capital, project funding, operating/ shelter costs		
Form 9: Project Milestones Attach supporting documents if milestones are achieved		
Form 10: Tax Compliance Declaration Form		
Form 11: Fairness is a Two-way Street		
Form 12: Statement of Equity Contributions		
Form 13: Statement of Insurance Provisions		
Form 14: Proof of Ownership, Option to Purchase or Leasehold Interest in Land		
Form 15: References		
Confirmation of Funding for all partnerships providing monies, services, or other donations to the capital costs of the project, where required – please attach letter(s)		
Statutory Form of Declaration		

Attachment A: Project Information Form Package

Form 2: Mandatory Eligibility Checklist

Submissions under the RFP that do not demonstrate compliance with all the following eligibility criteria will not be selected for funding. To be considered for funding, the proponent and the project must comply with **all** eligibility requirements.

CRITERIA	YES	NO
The proponent meets all corporate and equity requirements, i.e., is a non-profit corporation or private sector corporation and has the 10% or 4% equity.		
The proponent has provided proof of ownership of project site or long term lease, option to purchase or option for a long term lease which remains valid for a minimum of 18 months from the date of the proposal submitted, to be confirmed for the 20 year (or more) affordability period upon approval.		
The proponent has demonstrated that their projects are “ready start”.		
The proponent has demonstrated that their project submission is in accordance with Ministry of Environment, Grand River Conservation Authority and Canadian Environmental Assessment Act (CEAA) requirements, and if not, will specify details related to any contamination, ESA or other approvals required.		
Non-profit housing corporations that currently own and manage social housing projects and wish to use their land as equity have demonstrated that the necessary consents from CMSM and the Province can be in place by the appropriate time.		
The proponent demonstrates a willingness to create affordable rental housing for one or more of the target population(s) and to comply with program criteria for tenant selection and initial maximum income limits for the tenants.		
The proponent demonstrates a willingness to provide and commit to affordable rents (80% of the annual average market rents as established under the programme) for the 20-year affordability period.		
The proponent acknowledges that rent increases for all units funded under this program are subject to the legislation (Residential Tenancies Act, 2006).		
The proponent acknowledges and demonstrates willingness to comply with the Terms and Conditions set out in this RFP.		
The proponent has a proven track record in developing and managing affordable rental housing projects and experience working with the proposed target population(s).		
Any/all partners and affiliates identified in the proposal demonstrate the capacity and financial capability to undertake the proposed development.		
All project design details meet the programme criteria for location (located within the CMSM area), building type, project size, unit type and size.		
The proposed project demonstrates short-term and long-term financial viability.		
The proponent acknowledges and demonstrates a willingness to obtain CMHC mortgage insurance financing and will provide mortgage financing details (i.e. expected amount, interest rate and amortization, and letter from the lender indicating interest or commitment in financing the project (commitment can be conditional on obtaining programme financing).		
The proponent has completed, signed and submitted all required forms.		
The proponent acknowledges and demonstrates a willingness to enter into a Service Manager Contribution Agreement with the CMSM and all other agreements required under this RFP.		

Attachment A: Project Information Form Package

Form 3: Form of Offer

PLEASE PRINT OR TYPE

PROPONENT INFORMATION	
Legal Business Name:	
Contact Name and Title:	
Mailing Address:	Postal Code:
Phone No:	Fax No:
E-Mail Address:	
Address of Proposed Project:	

DECLARATION

I/We have carefully examined the Request for Proposal (RFP) documents and have a clear and comprehensive knowledge of the requirements under the RFP, which include the programme guidelines of the Investment in Affordable Housing for Ontario Programme and the Ontario Priorities Housing Initiative. By this submission, I/we agree and consent to the terms, conditions and provisions of the RFP and any addenda issued.

I/We hereby confirm that there is not nor was there any actual or perceived unfair advantage or conflict of interest in our submission or our performing of or observing that contractual obligations of the proponent set out in this RFP.

I/We hereby consent, pursuant to the *Municipality Freedom of Information and Protection of Privacy Act*, to the disclosure, on a confidential basis, of this proposal by the CMSM to consultants retained for the purpose of evaluating or participating in the evaluation of this proposal.

I/We hereby understand that in the event my/our proposal is selected under this RFP, in whole or in part, I/we agree to finalize and execute all requisite documents including the Service Manager Contribution Agreement in accordance with this RFP.

I/We hereby acknowledge that in the event my/our proposal is selected under this RFP, in whole or in part, it will be subject to approval of County Council and by the Ministry of Municipal Affairs and Housing . I / We further acknowledge that the County reserves the right to reject any proposal that is submitted pursuant to this RFP , including the lowest proposal, irrespective as to whether the proposal is ready start (as defined in the RFP) or not or it is determined by the County that due to factors outside my control that the proposal is not ready start and that I /we will not be entitled to any costs for preparing and submitting this proposal .

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I/We understand that in the event that my/our submission is selected under this RFP, in whole or in part. I/We, hereby agree to provide proof of the following requirements and conditions prior to entering into a Service Manager Contribution Agreement no later than December 31 of each programme year, following receipt of the approved Provincial Conditional Letter of Commitment:

1. Proof of ownership or long-term lease to permit development of the proposed project over a minimum 25 year period.
2. Approval of mortgage financing and interest rate, in the form of a mortgage commitment satisfactory to the Service Manager and the Province, for the balance of the required capital cost.
3. First permit for the demolition or foundation of the project to be completed and/ or permits for subsequent phases in the construction process.
4. Written confirmation of existing support services funding, if required.
5. Certificate of Insurance and any required insurance as part of the Service Manager Contribution Agreement, in the form of a valid certificate of insurance.
6. Confirmation of required owner equity, if required.
7. All other conditions precedent to the implementation of the project as set out in this RFP, the project submission to the County of Wellington and as outlined in the 2018 Ontario Priorities Housing Initiative Programme Guidelines.

I/We, hereby make the following requests and contributions:

Total number of units in the project: _____

Total

- | | |
|---|----------|
| 1. Request for affordable housing funding | \$ _____ |
| 2. Proponent Equity provided (see Form 12) | \$ _____ |
| 3. Request for Municipal Funds (see Form 5/6) | \$ _____ |
| 4. Other Contribution(s): Specify: _____ | \$ _____ |

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SIGNED SEALED AND DELIVERED in the presence of:

Authorized Signing Authority: (Party or Parties who will represent the proponent in all contractual matters requiring a signature and have the authority to bind the proponent)	
Print Name:	Print Name:
Position or Title:	Position of Title:
Signature:	Signature:
Date:	Date:
Name of Witness:	Name of Witness:
Signature of Witness:	Signature of Witness:

County of Wellington
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Attachment A: Project Information Form Package

Form 4: Local Planning Department Proposal Review Form

Proponent Information
Official Name of Proponent:
Proponent Address:
Contact Phone Number:
Proposed Project Location and Property Information
Municipal Address known as: _____ located in _____ Legal Address known as: _____
Current Official Plan designation:
Current Zoning information:

The following information should be filled in and signed by the municipal planning department contact person for the municipality in which the intended project will be built. Please note that local municipal staff will be sharing proponent information with CMSM/County of Wellington for the purposes of evaluating the proposal submission.

Name of Municipality:	
Planning Department Contact Name:	
Contact Number of Planner Reviewing Proposal:	
Email Address of Planner:	
Building Department Contact Name:	
Email Address of Building Staff:	

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	<u>Required</u>		<u>Approved</u>		<u>In Process</u>	
Official Plan Amendment	YES	NO	YES	NO	YES	NO
Rezoning/Zoning Bylaw Amendment	YES	NO	YES	NO	YES	NO
Subdivision Approval/Consent for Subdivision	YES	NO	YES	NO	YES	NO
Committee of Adjustment Variances/Consents	YES	NO	YES	NO	YES	NO
Site Plan Approval	YES	NO	YES	NO	YES	NO
Building Permit	YES	NO	YES	NO	YES	NO
Conservation Authority status	YES	NO	YES	NO	YES	NO
Eligible for construction within 3 - 7 months?	YES	NO	YES	NO	YES	NO
Information missing at the time of your review?	YES	NO	YES	NO	YES	NO

Please indicate by circling, if the following are required, approved or in process for this project:

Comments:_____

By signing below you agree with the above information.

_____	_____
Municipal Planning Staff (<i>Print Name</i>)	Municipal Planning Staff Signature
_____	_____
Municipal Building Staff (<i>Print Name</i>)	Municipal Building Staff Signature
_____	_____
Proponent (<i>Print Name</i>)	Proponent Signature
_____	_____
Date:	Date:

County of Wellington
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Attachment A: Project Information Form Package

Form 5 (Guelph only): Municipal Incentives Proposal Review Form

This form details the amount of Municipal Incentives that your project is eligible for and must be certified by the Municipality. Proponents should make every effort to determine the maximum amount of Municipal Incentives that could be available for their project (exclusive of property tax incentives).

To show that proponents have fully researched the Municipal incentives available and entered in the budget forms – project funding, proponents should make arrangements to have their concept plans reviewed by City staff and verify that the amount of Municipal Incentives requested are available and reasonable. This Form must then be signed by an authorized individual in the City of Guelph Planning or Finance Department. The total per unit value of municipal incentives is to be entered into the budget forms – project funding worksheet.

Please note that the City cannot be legally obligated to enter into and complete any transactions contemplated by this tender or the Project Agreements. Proponents are reminded that until City and County Councils have approved the form and substance of the Contribution Agreements (including the County of Wellington Housing Facility Agreement as negotiated by the City and County staff and authorized their execution, and the Agreements have been executed by the City and the County, the County and City have no obligations of any kind, direct or indirect, to proponents in respect of this proposed project.

I/We have determined that the project located at _____ is eligible for the following Municipal Incentives:

Incentive Description	Per Unit Value
Total	

City of Guelph Certification:

I have reviewed this submission and supporting documents and certify that the proponent estimates for Municipal Incentives shown above are reasonable and within approved guidelines for projects in the City of Guelph.

Comments:

Staff Position: _____

Staff Name (printed): _____

Signature _____

Date _____

County of Wellington
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Attachment A: Project Information Form Package

Form 6 (Wellington Only): Municipal Incentives Proposal Review Form

This form details the amount of Municipal Incentives that your project is eligible for and must be certified by the County of Wellington Municipality, and a separate form if required by the local municipality. Proponents should make every effort to determine the maximum amount of Municipal Incentives from the Councils of either or both the County and local Municipality that could be available for their project (exclusive of property tax incentives).

To show that proponents have fully researched the Municipal incentives available and entered in the Budget Form 8 – project funding, proponents should make arrangements to have their concept plans reviewed by County and/ or local municipal staff and verify that the amount of Municipal Incentives requested are available and reasonable. This Form must then be signed by an authorized individual in the municipal finance and or planning department. The total per unit value of municipal incentives is to be entered into the Budget Form– project funding worksheet.

Please note that the County and the local municipalities cannot be legally obligated to enter into and complete any transactions contemplated by this tender or the Project Agreements. Proponents are reminded that until the respective Council(s) have approved the form and substance of the Contribution Agreements (including the County of Wellington Housing Facility Agreement as negotiated by the County staff and authorized their execution, and the Agreements have been executed by the County and the local municipalities, the County and local municipalities have no obligations of any kind, direct or indirect, to Proponents in respect of this proposed project.

I/We have determined that the project located at _____ is eligible for the following Municipal Incentives:

Incentive Description	Per Unit Value
Total	

County of Wellington/ Local Municipality Certification:

I have reviewed this submission and supporting documents and certify that the proponent estimates for Municipal Incentives shown above are reasonable and within approved guidelines for projects located within the County of Wellington.

Comments: _____

Staff Position: _____

Staff Name (printed): _____

Signature _____

Date _____

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Attachment A: Project Information Form Package

Form 7: Affordable Housing Business Plan

Please provide your own typed Business Plan, which includes the information below, limiting it to 15 pages or less, in addition to the mandatory forms and/or attachments.

PROPONENT INFORMATION
Provide details in proponent type i.e. private sector developer, non-profit corporation etc: proof of legal incorporation in Ontario or Canada – attach copy; reference to any past projects, particularly those which demonstrate the ability of the proponent to develop and manage affordable rental housing; evidence of a successful track record, including contacts and references; demonstrate an awareness and familiarity to social and neighborhood factors. Clearly identify any charitable status. Clearly identify any partnerships.
DEVELOPMENT/MANAGEMENT TEAM / BOARD OF DIRECTORS INFORMATION
Project team information including architect, engineer, consultants, contractors, suppliers and any partnership arrangements. Details should include a list of professional contacts available to the proponent including providers of financial, legal, planning and architectural services. For Non-Profits, include a list of Board of Directors and a copy of resolution approving application under the RFP.
PARTNERSHIP INFORMATION
List all partner organizations and their involvement, include written confirmation of other programme funding from partners, if applicable. Provide evidence of a successful track record and financial competence for any/all partners involved.
DESIGN CONCEPT & DRAWINGS
Note the rationale for any design considerations in relation to tenant mandate, services, etc.; provide details on implementation plan/development schedule showing dates for achieving key milestones including any planning approvals, building permits, construction schedule and occupancy; clearly identify any local design principles and energy and water efficiency measures incorporated and/or areas that incorporate any local program design criteria; identify any supplemental materials to be used for construction, for example, impact resistant drywall, shatter proof windows, etc.
TARGET TENANT GROUP
Identify the target tenant group of project; evidence that the proposal promotes affordable rental housing opportunities in geographic areas of Wellington and Guelph where the existing supply of rental housing is limited and there is a demonstrated need.

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FINANCIAL OVERVIEW
In addition to completing the Proposed Capital Budget, Proposed Project Funding and Proposed Annual Operating Budget (Form 8), the Business Plan should demonstrate the proponent's ability to financially sustain the proposed project (affordable funded units, market rent units, condo revenue and all other revenue sources) for both the short and long-term and its ability to maintain monthly rental rates at targeted levels; provide details on any financial commitments, if available; explanation/evidence of sufficient funding for total project costs, including equity contribution as indicated on Form 12; identify confirmed funding for support services where proposed; clear delineation of requested financial and/or other assistance including confirmation that funding will not be used for repayment of an existing debt; include copy of most recent audited financial statements. Please include a copy of the mortgage letter of intent or mortgage pre-approval from the financial institution. If a portion of the development is slated to be made up of condominium units, submissions must include an explanation regarding the proponent's intentions related to the County's mortgage being secured against the whole of the property and how the mortgage would operate for the term of the agreement, including any proposals for partial discharge.
MARKETING PLAN (including information on tenant rent-up plan)
Provide description of all community consultation and activities involved in marketing the proposed project.

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Attachment A: Project Information Form Package

Form 8: Budget Form and Funding Worksheet

See Attached Excel Workbook

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Attachment A: Project Information Form Package

FORM 9: Project Milestones

Milestones	Initial Estimate Date (yyyy-mm-dd) Or indicate if N/A	Revised Estimate Date (yyyy-mm-dd) Or indicate if N/A	Actual Date (yyyy-mm-dd) Or indicate if N/A Check X if already achieved /Attach supporting documents
Site Acquired			
Planning Act Approvals			
Official Plan Amendment			
Severances			
Easements			
Re-zoning Approval			
Minor Variance Approval			
Site Plan Approval			
Environmental / Conservation Authority Approvals			
Completed ESA -Phase 1			
Completed ESA – Phase 2			
Completed ESA – Phase 3			
Confirmation of Canadian Environmental Assessment Act Requirements			
Conservation Authority			
Record of Site Condition			
Additional Development Schedule			
Permit (excavation, foundation, demolition)			
Building Permit			
Construction Start			
Substantial Completion			
Occupancy			
Construction Lien Publication			
Financial			
Mortgage Financing			
Interest Adjustment Date			
Owner Equity Specify if mandatory 10% or 4% or N/A:			
Insurance			
Security Documents eg. Development Charges Agreement, etc.			

DATED: _____

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Attachment A: Project Information Form Package

Form 10: Tax Compliance Declaration Form

The Ontario Government expects all proponents to pay their Provincial taxes on a timely basis. In this regard, proponents are advised that any contact with the Ontario Government will require a declaration from the successful proponents that his/her company's Provincial taxes are in good standing.

In order for a company to be considered for a contract award, the Proponent must submit the following statement of the company's tax compliance status.

I/We hereby certify that _____ at the time of submitting this proposal,

(Legal name of Proponent)

is in full compliance with all tax statutes administered by the Ministry of Finance of Ontario and that, in particular, all returns required to be filed under all Provincial tax statutes have been filed and all taxes due and payable under those statutes have been paid or satisfactory arrangements for their payment have been made and maintained.

Date at _____ this _____ day of _____, 20_____.

(Signature of proponent or an authorized signing officer who binds the proponent)

(Print Name)

(Title)

(Phone Number)

(Fax Number)

(Date)

Attachment A: Project Information Form Package

Form 11: Fairness is a Two-Way Street

1. In this Article:

(a) "Construction" includes all work in or about:

- (i) constructing, altering, decorating, repairing, demolishing, erecting or remodeling the whole or any part of a building or structure;
- (ii) laying pipe and conduit above 'or below ground level;
- (iii) excavating, tunneling, fencing, grading, paving, land clearing and bridging;
- (iv) building a highway, as defined in section 1 of the *Highway Traffic Act*;
- (v) carrying out other activities prescribed by the Minister of Labour under the *Fairness is a Two-Way Street Act (Construction Labour Mobility), 1999* for inclusion in the definition of Construction; and
- (vi) providing consulting services, including architectural or engineering services, with respect to the matters set out in clauses (i) to (v).

(b) "Contractor" means a person that enters into a contract for Construction and includes any sub-contractor;

(c) "Controlled" has the same meaning as in subsection 1 (5) of the Business Corporations Act;

(d) "Designated Jurisdiction" means a Province or territory of Canada prescribed by the Lieutenant Governor in Council as a designated jurisdiction under the *Fairness is a Two-Way Street Act (Construction Labour Mobility), 1999*.

(e) "Person who is resident in a Designated Jurisdiction" means:

- (i) in the case of an individual or a sole proprietor, a person who is ordinarily resident in that jurisdiction;
- (ii) in the case of a corporation:
 - (A) a person whose head office or registered office is located in that jurisdiction; or
 - (B) a person controlled directly or indirectly by a person described in subclause (A);
- (iii) in the case of a partnership, a partnership that includes at least one partner who is resident in that jurisdiction under clause (i) or (ii) .

2. All ministries, and any agencies/boards or commissions prescribed by the Minister of Labour under the *Fairness is a Two-Way Street Act (Construction Labour Mobility), 1999*, shall not award a Construction contract to a Contractor who is a person resident in a Designated Jurisdiction. Such a person is not eligible and will be disqualified from this RFP.

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3. All Proponents are required to provide the following information in respect of themselves and any sub-contractors:
 - (a) in the case of an individual or sole proprietor, whether he/she is ordinarily resident within a Designated Jurisdiction;
 - (b) in the case of a corporation, whether the corporation's head office or registered office(s) is/are in a Designated Jurisdiction or whether any person who controls the corporation, either directly or indirectly, is a person who is ordinarily resident in a Designated Jurisdiction;
 - (c) in the case of a partnership, whether the partnership includes one partner who is resident in a Designated Jurisdiction under clause (a) or (b) above, and
 - (d) whether any exemptions prescribed under the Act are applicable.
4. In any Construction contract awarded under this RFP, if any, the Contractor will be required to:
 - (a) represent and warrant that neither the Contractor nor any sub-contractors are persons who are resident in a Designated Jurisdiction;
 - (b) acknowledge that any sub-contracts not identified in the bid following the award of the contract will be subject to the approval of the Ministry of Municipal Affairs and Housing;
 - (c) acknowledge that any material misrepresentation or breach of the representation and warranty in clause (a) will be grounds for termination.
5. This provincial requirement will be considered in the evaluation of bids and proposals received under this RFP.

DECLARATION BY PROPONENT

Italicized terms have the same meaning as in this Article of the RFP document.

1. The Contractor represents and warrants that neither the Contractor nor any sub-contractor is a *person who is resident in a Designated Jurisdiction*.
2. Any sub-contract proposed by the Contractor after the date of this Contract shall be subject to the prior written approval of the Ministry of Municipal Affairs and Housing and the Corporation of The County of Wellington.
3. In the event of any material misrepresentation or breach of the representation and warranty in paragraph 1 of this Declaration, it is acknowledged and agreed that the Ministry of Municipal Affairs and Housing and /or The Corporation of the County of Wellington may, without liability therefore, terminate this Contract upon written notice to the Contractor.

I/We have authority to bind the proponent.

I/We have authority to bind the proponent.

(Print Name and Title, if appropriate)

(Print Name and Title, if applicable)

Signature of Proponent (s)

Signature of Proponent (s)

Date

Date

County of Wellington
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Attachment A: Project Information Form Package

Form 12: Statement of Equity Contributions

I/We hereby declare that I/we will supply equity for the following amounts if I/we are a successful project.

*Please note that successful proponents will be required to provide an affidavit to confirm equity contributions, prior to signing a Contribution Agreement and release of funds.

Type or Form of Equity <i>(Including any details of any specified designation/application – e.g. if land equity contribution, an appraisal will be required to be submitted)</i>	Date to be advanced	Amount <i>(if other than cash, show how this was calculated)</i>

Continue on reverse side of page if necessary.

I/We have authority to bind the proponent.

(Print Name and Title, if appropriate)

Signature of Proponent (s)

Date

I/We have authority to bind the proponent.

(Print Name and Title, if appropriate)

Signature of Proponent (s)

Date:

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Attachment A: Project Information Form Package

Form 13: Statement of Insurance Provisions

Prior to commencement of any contract/agreement arising out of this RFP Proposal Submission /we hereby agree to provide the CMSM and any other party the County of Wellington reasonably requires with a valid Certificate of Insurance and any renewal/replacement as may be necessary, confirming the insurance coverage requirements outlined in this RFP Proposal Submission and stating any pertinent exclusions as applicable, contained by the policy (ies).

I/We further agree that these insurance requirements will be included in any Agreement made with any contractor requiring the contractor to comply with these insurance requirements set out in the contract/agreement by obtaining similar types of insurance and providing the contractor with valid Certificates of Insurance.

I/We further agree to provide of the following insurance in a form satisfactory to and as requested by County of Wellington:

- a) construction risk insurance of at least \$5 million;
- b) commercial general liability insurance of at least \$5 million;
- c) all risk property insurance for the project under development for its full replacement cost; and,
- d) such other insurance as the CMSM or MMAH may reasonably require (contact CMSM for more details).

I/We further acknowledge that the Province, CMSM and CMHC may request indemnification in their respective standard forms.

I/We have authority to bind the proponent.

I/We have authority to bind the proponent.

(Print Name and Title, if appropriate)

(Print Name and Title, if appropriate)

Signature of Proponent (s)

Signature of Proponent (s)

Date

Date

Attachment A: Project Information Form Package

Form 14: Proof of Ownership, Option to Purchase or Leasehold Interest in Land

I/We hereby declare that I/we own the land for my/our proposed project known municipally as

_____ and
described legally as _____.

OR

I/We hereby declare that I/we hold leasehold interest in the land for my/our proposed project municipally

as _____ and described
legally as _____ as

evidenced by the attached certified copy of the Lease.

OR

I/We hereby declare that I/we hold or are negotiating a purchase or long-term lease for the land for

my/our proposed project known municipally as _____

and described legally as _____ and

will provide a certified copy of said Option or an Agreement of Purchase & Sale as required by the

Condition Letter of Commitment with the Ministry of Municipal Affairs and Housing.

I/We have authority to bind the Proponent.

I/We have the authority to bind the proponent.

(Print Name and Title, if appropriate)

(Print Name and Title, if appropriate)

Signature of Proponent (s)

Signature of Proponent (s)

Date:

Date:

Attachment A: Project Information Form Package

FORM 15: Reference Form

Each proponent shall provide a minimum of 3 references from clients for Canadian multi-residential projects for whom they have provided similar services within the past five years.

1)	Company	
	Address	
	Contact:	
	Title	
	Telephone Number:	
	Date work undertaken	
	Type of work undertaken	
2)	Company	
	Address	
	Contact:	
	Title	
	Telephone Number:	
	Date work undertaken	
	Type of work undertaken	
3)	Company	
	Address	
	Contact:	
	Title	
	Telephone Number:	
	Date work undertaken	
	Type of work undertaken	

I/ We hereby give consent to the Wellington Consolidated Municipal Service Manager to contact the above noted references.

Dated at _____ this _____ day of _____, 20_____.

Name and title (Please print)

Signature of the Proponent

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Attachment B: Occupancy Standards

AFFORDABLE HOUSING REQUEST FOR PROPOSALS INFORMATION

New Rental Housing Component

County of Wellington Social Services Department - Occupancy Standards.

The Occupancy Standards Policy can be found at the following link:

[Housing Services - Occupancy Standards \(wellington.ca\)](#)

County of Wellington
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Attachment C: OPHI Guidelines

AFFORDABLE HOUSING REQUEST FOR PROPOSALS INFORMATION

New Rental Housing Component

**Ministry of Municipal Affairs and Housing:
Ontario Priorities Housing Initiative (OPHI) - Programme Guidelines -
Rental Housing Component**

Canada-Ontario
Community Housing
Initiative (COCHI) &
Ontario Priorities
Housing Initiative (OPHI)
– Effective April 1, 2023

PROGRAM GUIDELINES

Rental Housing Component

The Rental Housing component will:

- Increase the supply of community rental housing for households on, or eligible to be on, social housing waiting lists
- Ensure that safe, adequate, and affordable rental housing is available to Ontario households

Eligibility Criteria - Projects

Eligible projects must be non-profit/municipal/co-operative developments or partnerships, and be one of the following:

- New construction, including additions and extensions
- Acquisition and, where required, rehabilitation of existing residential buildings to maintain or increase the affordable rental housing stock
- Conversion of non-residential buildings or units to purpose-built rental buildings/units

Social housing redevelopment which involves building new affordable rental units/additions on social housing sites is eligible provided that the appropriate ministerial or Service Manager consent, as applicable, is obtained as per the *Housing Services Act, 2011*.

Amendments to the *Housing Services Act, 2011*, effective January 1, 2017, have resulted in changes to consent authorities. Specifically, Service Managers now have consent authority for the transfer of most social housing properties. Please refer to the Guide for Service Manager Consents under the Housing Services Act, 2011 which can be found at:

<https://www.ontario.ca/page/consent-authority-service-managers>

Ineligible Projects

Projects that are **not eligible** include:

- Projects proposed by private sector proponents without non-profit/municipal/co-operative partnership*
- Additional units (secondary or garden suites) in owner-occupied housing (eligible only under the Ontario Renovates component)
- Nursing and retirement homes
- Shelters and crisis care facilities
- Owner-occupied housing
- Student residences

*Canada Mortgage and Housing Corporation has made available other programs – for example, the National Housing Co-Investment Fund – to support the development of affordable units by private developers. The Ministry is interested in focusing OPHI funding on the development of community housing that will provide longer-term public benefit.

Eligibility Criteria – Units

Units must be modest in size and amenities relative to other housing in the community. Units

are expected to be self-contained. Proponents who wish to develop congregate living buildings (rooms with shared living spaces) for supportive housing may be eligible for program funding and should provide a rationale in order to receive funding.

Service Managers may establish size and amenity requirements. If Service Managers do not set size requirements, the following provincial minimum and average size requirements can be used as a guideline for new construction projects.

	Bachelor	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Minimum	40.0 m ²	48.7 m ²	60.4 m ²	83.6 m ²	102.2 m ²
Average	41.8 m ²	55.0 m ²	67.4 m ²	92.9 m ²	109.2 m ²

Up to 30 percent of the total available space may be used for non-residential purposes, including common areas and services used directly with the residential accommodation such as office space for support services providers.

Project Submission Process

Service Managers will solicit proposals and select Rental Housing projects to recommend to the Ministry for funding approval. All procurement processes must be in accordance with the *Municipal Act, 2001* or the *City of Toronto Act, 2006* (applicable to the City of Toronto).

Service Managers will submit recommended projects for the Ministry's consideration within the allocation set out in their Investment Plans.

Recommended projects shall:

- Be approved by council and/or board based on municipal/board procurement practices and in accordance with the *Municipal Act, 2001* or the *City of Toronto Act, 2006* (applicable to the City of Toronto)
- Be able to sign a Contribution Agreement and confirm registration of security (in a format that is applicable) no later than **December 15** of each program year
- Be able to start construction within 120 days after signing a Contribution Agreement and be completed within four years
- Be financially viable from a construction and operating cost perspective – based on Service Manager confirmation
- Meet the current Ontario Building Code and comply with the CMHC-provided checklist in Appendix C
- Have unit rents that are at or below the Canada Mortgage and Housing Corporation Average Market Rent for the community or as approved by the Ministry for a minimum of 20 years (see "Affordability Criteria and Rents" on page 31 for additional details)
- Project weighted average rent must be at or below 80 percent of CMHC AMR
- Provide the required equity, if applicable – 4 percent for partnerships between private sector and non-profit organizations; zero (0) percent for non-profit organizations
- Address local housing needs and target tenant groups identified in local housing and homelessness plans
- Be designed to maximize achievable reductions in energy consumption and

greenhouse gas emissions relative to minimum requirements (i.e., meet or exceed the current National Energy Code or Ontario Building Code requirements for new construction; and maximize the achievable energy savings where possible when planning work or retrofits for renovations/repairs). The Ministry will provide guidance and requirements for energy consumption and greenhouse gas emissions reductions in a separate communication to SMs.

- Have an occupancy plan in place to ensure that units will be occupied in a timely manner

Further, Service Managers are encouraged to give priority consideration to projects that:

- Have Contributions by Others, including the Service Manager, local municipality, and proponent – to be used in partnership with OPHI Rental Housing funding
- Include family-sized (multi-bedroom) units
- Are fully accessible and/or have units that are accessible to persons with disabilities
- Provide community employment benefits (for project with total contributions \$10M or above) including:
 - Work contracts for small and medium-sized businesses (As per Statistics Canada, a small enterprise has fewer than 100 employees and a medium enterprise has 100 to 499 employees)
 - Job creation for apprentices, Indigenous peoples, women in construction, veterans, and newcomers to Canada
- Have support service funding in place, if applicable

Project Approval Process

Project approval will be based on construction readiness, the ability to meet the program's eligibility criteria, financial viability and value for money, and alignment with the Investment Plan.

For each recommended project recommended for funding, Service Managers are required to create and submit Project Information Forms through TPON to the Ministry no later than November 30 of each program year. All projects must be submitted through TPON along with additional project background information such as that contained in Council/board reports.

Once approved, a project will receive a Conditional Letter of Commitment (CLC) from the Ministry, which confirms Ministry approval and outlines the steps to take prior to signing a Contribution Agreement.

The Contribution Agreement describes the legal obligations and reporting requirements for the project. All Service Managers are required to enter into Contribution Agreements directly with proponents.

Funding

Service Manager funding for the Rental Housing component is provided as a forgivable capital loan.

The OPHI Rental Housing component will fund up to 75 percent of the pro-rated share of the capital costs of the affordable units. Total capital costs include land, financing, hard (construction) and soft costs but less any HST rebates.

To encourage the development of family-sized units, and in recognition of the variance in costs across the province, per unit funding caps have been eliminated under the OPHI Rental Housing component. Service Managers are encouraged to consider factors such as unit bedroom size, unit type (e.g., low-rise apartment, high-rise apartment, townhouse), or geographic location of the project within the Service Manager's service area when determining project funding amounts. The Ministry, however, will only approve projects that are determined to provide value for public money and are modest relative to other housing in the community.

Service Managers are required to perform their due diligence to ensure that a project is financially viable from a construction cost and on-going operating context, that costs per unit are accurate and that the program expenditures represent a prudent and best value use of public dollars.

The Ministry, at its discretion, may require further information from the Service Manager or an independent analysis to confirm project financial viability including soft, hard and land costs (including any details regarding acquisition and local market conditions) to develop affordable housing units.

Funding Commitment

As funding allocations must be committed for the program, the deadline to execute Contribution Agreements and confirmation of security is December 15 of each program year to allow time for reallocation of funds if necessary. Service Managers that have not signed a Contribution Agreement or have not begun construction by the required dates may have their funding reallocated.

Contributions by Others

In addition to the mandatory program requirements, Service Managers, municipalities, and proponents are encouraged to provide additional contributions in order to increase the financial viability of the project and/or to provide deeper affordability for tenants.

Contributions by Service Managers and/or municipalities may include: planning approvals application fees; building permit fees; and full property tax exemptions as well as contributions of municipal grants, and municipally owned land.

Where appropriate, and to avoid the granting of bonuses, a Service Manager will need to ensure that an appropriate policy or program (e.g., Community Improvement Plan (per Section 28 of the *Planning Act, 1990*), Municipal Housing Facilities By-law (per Section 110 of the *Municipal Act, 2001* – see page 33)) is in place to enable municipal contributions.

For additional information on this and other municipal tools and incentives for affordable housing development, please contact the appropriate service manager, municipality, and/or respective Regional Municipal Offices Team Leads for more information.

Contributions by proponents may include land or cash, including that from fundraising and donations.

Payment Process

The Ministry will advance funding directly to Service Managers, who will be responsible for

making project payments to housing proponents. Service Managers will advance funds to proponents based on the completion of construction milestones and compliance with the program requirements.

Funding will be advanced to Service Managers based on the following instalments:

- 50 percent at signing of the Contribution Agreement and confirmation of registration of security.
- 40 percent at confirmation of structural framing for new construction or 50 percent completion for acquisition and rehabilitation projects.
- 10 percent at confirmation of occupancy, submission of Initial Occupancy Report, including actual capital costs.

The Ministry may consider accelerated payments for acquisition/modular projects on a case-by-case basis.

All final payments are required to be made within four years of signing the Contribution Agreement. Service Managers are required to ensure that all projects are completed and request the final payment prior to this deadline.

Eligible Target Groups

The Rental Housing component aims to create affordable rental housing for households that are on, or eligible to be on, social housing waitlists. This includes, but is not limited to:

- Seniors
- Persons with disabilities
- Indigenous peoples
- People with mental health or addictions issues
- Survivors of domestic violence
- Those who are homeless or at risk of homelessness
- Recent immigrants
- Working poor
- Veterans
- Racialized groups

Income Verification

Service Managers are required to establish maximum income levels for OPHI-funded Rental Housing units at the time of initial tenancy; however, all households must be on, or eligible to be on, the waiting list for social housing. Service Managers must establish an approach for income verification to ensure that households in need are targeted.

Annual income verification is at the Service Manager's discretion.

Affordability Criteria and Rents

Projects approved under the Rental Housing component must remain affordable for a minimum period of 20 years. Affordability is defined as having both of the below criteria:

- 1) Individual unit rents for the project must be at or below Canada Mortgage and Housing

Corporation Average Market Rent (CMHC AMR) at the time of occupancy. Individual unit rent is calculated using actual rents paid by tenants and any rent supplements provided by the Service Manager.

- 2) The project weighted average rent must be at or below 80 percent of CMHC AMR. The project weighted average rent considers the proportion and project's total number of units of varying sizes and types.

Service Managers have flexibility in setting rent paid by tenants as long as rent for each unit is at or below CMHC AMR and the project weighted average rent does not exceed 80 percent of the project's weighted average CMHC AMR. An illustration is provided below:

Weighted Average Based on CMHC AMR:				Project Weighted Average Rent:		
Bedroom Type	No. of Units	CMHC AMR	Weighted Average CMHC AMR	Proposed Rent	No. of Units	Weighted Average of Actual Rent
1BR	2	1,000	2,000	100	2	200
2BR	3	1,200	3,600	1,200	3	3,600
3BR	5	1,500	7,500	1,300	5	6,500
Weighted Average Based on CMHC AMR	10		1,310	Project Weighted Average	10	1,030
80 percent of Weighted Average	1,048			Project's Weighted Average Rent	79 percent	
				Proposed Rent is 79 percent of CMHC AMR		

Projects may include both OPHI Rental Housing and market units, but only units with rents that meet affordability requirements will receive OPHI funding.

If rent supplements are used for OPHI-funded units to provide deeper affordability for tenants, the Service Manager shall ensure total rent received by a Proponent, including rent from the tenant and any rental supplements from the Service Manager or other party shall not exceed 100 percent of Canada Mortgage and Housing Corporation Average Market Rent. In addition, the total of the rent paid by the tenant and any federal and/or provincially funded rent supplements paid to the proponent must be used to calculate the weighted average rent in a project.

Rent increases after initial occupancy must be made in accordance with rules established in the *Residential Tenancies Act, 2006*. New rental buildings (no part of which was occupied for residential purposes on or before November 15, 2018) are technically exempt from the *Residential Tenancies Act, 2006* rent increase guidelines but are subject to terms and conditions in the Transfer Payment Agreement. The Transfer Payment Agreement states that rent increases follow the *Residential Tenancies Act, 2006* rent increase guidelines but must still remain at or below 100 percent of Canada Mortgage and Housing Corporation Average Market Rent and that average weighted rents for the project must not exceed 80 percent of Canada Mortgage and Housing Corporation Average Market Rent.

Alternate Average Market Rent Values

The intent of the Rental housing component is to develop affordable rental housing units for low to moderate income households and to provide longer-term public benefit. As such, the individual units created under this component must adhere to the affordability rule of being at or below CMHC AMR and a project weighted average at or below 80 percent of CMHC AMR.

If Canada Mortgage and Housing Corporation Average Market Rents are not available for certain communities, or the Service Manager believes that the Canada Mortgage and Housing Corporation Average Market Rents may impact project viability, the Service Manager may request alternate average market rent values. Service Managers may request alternate average market rent values by submitting a business case to the Ministry for a project that includes a strong rationale for alternate average market rent values to justify project viability. All such requests will be reviewed on a case-by-case basis and Ministry approval is not guaranteed.

General Requirements

The following general program requirements apply to projects approved under the Rental Housing component:

Municipal Housing Facility By-law

- Where appropriate a Service Manager will ensure that a Municipal Housing Facility By-law is available to enable municipal contributions in accordance with the *Municipal Act, 2001* or the *City of Toronto Act, 2006* (applicable to the City of Toronto).
- Where a District Social Services Administration Board (DSSAB) is the Service Manager, collaboration with the appropriate local municipality will be required to ensure a Municipal Housing Facility By-law is available to proponents when deemed necessary.

Note: A Municipal Housing Facilities By-law and Agreements are a tool available under *Section 110 of the Municipal Act, 2001* and *O. Reg 603/06* (among many other tools under the *Municipal Act, 2001* and *Planning Act*) that may help facilitate municipal contributions and incentives for housing development. It may not always be appropriate and/or required for all housing developments. For more information contact the appropriate Service Manager, municipality, and/or respective Regional Municipal Offices Team Leads.

Municipal Capital Facilities Agreement

Municipal Capital Facilities Agreements per *O. Reg 603/06* may be used by municipalities to create relationships with other parties to deliver municipal facilities. An example of this may involve an agreement between a municipality and a not-for-profit organization in which the municipality provides financial assistance for affordable housing facilities.

Under these agreements, assistance provided by a municipality may include: giving or lending money; giving, leasing, or lending property; guaranteeing borrowing; providing the services of employees of the municipality; and/or providing tax exemptions or reductions.

Construction

- Projects must start construction within 120 days of signing a Contribution Agreement

- Projects that do not start construction within 120 days of signing a Contribution Agreement may, at the Ministry's discretion, have program funding withdrawn and reallocated to another Service Manager (SM)/Indigenous Program Administrators (IPA)
- Written confirmation of construction start must be provided to the Ministry
- Site inspections will be conducted at the discretion of the Ministry
- Projects must complete construction within four years of signing a Contribution Agreement

Service Managers must inform the ministry as soon as possible if a project is at risk of not being completed within the four-year deadline.

Equity

- Minimum four percent equity must be provided for projects sponsored by partnerships between private companies and non-profit organizations.
- No equity contribution is required for projects sponsored by non-profit or co-operative housing organizations to encourage participation by these groups in the program.
- Please note that private lenders may have additional equity requirements.

Municipal Property Tax

- Service Managers/Municipalities are required during the first 20-year affordability period of projects greater than seven units to either:
 - Reduce property taxes for Rental Housing projects by setting it at a rate equivalent to, or lower than, the single residential rate for the area; or
 - Provide a grant in lieu of this property tax reduction.

Indemnification and Repayment

There are obligations for all OPHI parties with regard to the indemnification and recovery of government funding. Specific obligations and provisions are included in the Transfer Payment Agreement.

Reporting

In addition to individual project submission through the TPON, Service Managers are required to update their Investment Plans with their funding commitment projections under the Rental Housing component on a quarterly basis. Please refer to Page 7 for reporting requirements and due dates. Proponents will be required to report accordingly to their Service Manager.

Quarterly updates to the Investment Plan will be supplemented by regular milestone updates through TPON along with progress reports to the Ministry contacts describing project progress and potential issues of concern that might delay or jeopardize the project.

Service Managers will be required to submit documentation in TPON as follows:

- Within 120 days after signed Contribution Agreement: first available Building Permit, Confirmation of Construction Start
- At completion of structural framing: confirmation of structural framing through building inspection report

- An audited capital cost statement within six months following the initial occupancy date, or such additional time acceptable to the Ministry

Service Managers are also required to complete and file with the Ministry an Initial Occupancy Report once projects are completed and occupied, and Annual Occupancy Reports for the first three years after project completion. After the first three years, filing of the Annual Occupancy Report is not required although the Service Manager is still required to complete the Annual Occupancy Report and may be requested to submit the report periodically.

This reporting ensures compliance with the provisions of the CMHC-Ontario Bilateral Agreement under the National Housing Strategy and other established program requirements. All reports and updates are to be submitted through TPON, where possible.

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Attachment D: A Place to Call Home

County of Wellington Social Services Department – A Place to Call Home: A 10-Year Housing and Homelessness Plan for Guelph Wellington (HHP)- 5 Year Update.

This document includes a five-year-review and sets the groundwork from now until 2024 by updating our community's goals and targets for developing appropriate, safe and affordable housing in Guelph Wellington.

The County of Wellington's HHP - 5 Year Update can be found at the following link:

[**A-Place-to-Call-Home_Five-Year-Update-Final.pdf \(wellington.ca\)**](#)

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**Attachment E:
Affordable Rental Housing Development Resource Guide**

The Affordable Rental Housing Development Resource Guide is made available by the County of Wellington as a resource to individuals and groups wanting to develop, build and operate affordable rental housing. Included in this guide are practical considerations that highlight specific topic areas and the development process more fully.

The Guide can be accessed at the following link:

[Affordable Rental Housing Development Resource Guide May 2021 \(wellington.ca\)](#)

Any questions concerning development of affordable rental housing may be directed to the CMSM.