
Action Ottawa

Affordable Housing Initiative

REQUEST FOR PROPOSALS Summer 2017

**Submission Deadline:
3:00pm on Wednesday, October 4th, 2017**

Submissions must be delivered to:

City of Ottawa
Supply Services
100 Constellation Drive
4th Floor West Tower
Ottawa, Ontario K2G 6J8
Title: Action Ottawa Request for Proposals 2017

July 5th, 2017



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Changes to the RFP requirements

Please note that the Summer 2017 RFP process and requirements include a number of changes from previous RFP processes.

Ensure that you read all of the Summer 2017 RFP document so that your submission meets all of the new and changed requirements.

1.0 Introduction

The intent of this Request for Proposals (RFP) is to advance the objectives of the Ottawa City Council approved 10 Year Housing and Homelessness Plan by facilitating the development of new affordable/supportive rental housing. The City of Ottawa is seeking multiple submissions to develop affordable rental housing. This RFP is open to both incorporated private and not for profit housing providers.

This RFP includes capital funding from two different funding streams:

- Up to a total of \$10M in capital funding is available from the Investment in Affordable Housing for Ontario (IAH) 2014 Extension and the Social Infrastructure Fund (SIF) Program streams, and
- Up to a total of \$8M¹ in capital funding is available from a new Government of Ontario program entitled Home For Good (HFG).

Under this RFP, the available funds are to facilitate the development of new affordable housing that addresses the following two priorities:

- Mixed Composition Affordable Housing,
- Supportive Housing for individuals experiencing chronic homelessness or other provincial priority homelessness categories under the HFG.

For this RFP, IAH funding is available for Mixed Composition Affordable Housing, housing for families and for supportive housing. Refer to Appendix A for a description of Mixed Composition Affordable Housing and Appendix B for Supportive Housing.

HFG funding may be available in 2018 to assist recipients who fall within one or more of the provincial priority homelessness areas:

- Chronic homelessness;
- Youth homelessness;
- Indigenous homelessness; and
- Homelessness following transitions from provincially-funded institutions and service systems (e.g., hospitals and prisons).

Refer to Appendix B for a description of supportive housing requirements. **Note that this funding stream is only available to partner agencies that currently have service contracts with the City or Province.**

¹ \$8M is the estimated amount based on the requested provincial funding. The actual amount of available funding will be determined once the provincial government has awarded the funds and all funding will be subject to Council approval.

2.0 Project Description

2.1 Background

Affordable housing is an integral part of diverse and vibrant communities where individuals and families can work, live and play. Providing for a mix of affordable dwelling types helps to create and maintain economically-sustainable communities as units can be made available to households with varying needs and adapted over time. The demand for affordable and suitable housing for households on low-income far exceeds the supply; therefore, the focus of this RFP is to provide a range of developments to advance the goals of the City's 10 Year Housing and Homelessness Plan.

All proposals are to illustrate how they will provide affordable housing to low income households and/or persons, households or persons earning a minimum wage or on the Ontario Disability Support Program (ODSP) for supportive housing.

Action Ottawa is the City's primary program for increasing the supply of low-income affordable housing. The program combines City funding and Council approved incentives for affordable housing into a single vehicle that is designed to facilitate the development of mixed income communities that are well designed, well managed, and built on a scale that ensures integration within neighbourhoods. Action Ottawa provides up front capital funding toward the initial costs associated with development in exchange for long term (35 years) affordability for low and moderate income households. Unless otherwise stated, Action Ottawa does not provide nor guarantee ongoing operational subsidies or rent supplements toward any project.

Proposals submitted under this RFP are subject to either the New Rental Housing Component of the IAH (2014 Extension) program, the IAH-SIF program guidelines as well as the requirements as set out in this RFP; or the Home for Good (HFG) Program and the requirements as set out in this RFP. The [IAH \(2014 Extension\) and IAH - SIF Guidelines](#) can be found on the Ministry of Municipal Affairs and Housing website at <http://www.mah.gov.on.ca>.

Under HFG, funding will be provided from the Province, to Service Managers, to assist recipients who fall within one or more of the provincial priority homelessness areas listed in Section 1.0.

Projects considered under the Home for Good funding stream shall be selected under the direction of City staff and will be subject to Council approval.

2.2 Objectives

This RFP aims to create new rental stock for low to moderate-income households through:

1. Construction of new buildings (or) acquisition and rehabilitation of existing buildings into affordable rental housing that is economically, socially and environmentally sustainable;
2. Infill and/or redevelopment of eligible social housing communities that results in additional units, and improves the built form and sustainability for both the community and the social housing provider;

The proposed buildings must:

1. Provide affordable rental housing that remains affordable and operates in accordance with the City of Ottawa's Below Market Rent Guidelines for a minimum period of 35 years;
2. Development of a minimum of 3 self-contained dwelling units. A self-contained dwelling unit is defined as a set of rooms or suite of rooms located in a building or structure that is intended for use as residential premises by one household and which contains kitchen and bathroom facilities that are intended for the exclusive use of the unit;
3. Be visit-able and include universally accessible units for persons with disabilities. Given that the RFP is primarily for households and individuals on the CWL, proposals must include a minimum of 10% of total units that are barrier free. Refer to section 6.3 (7) and Appendix C for additional information;
4. Include and demonstrate the use of green building and energy efficient design to minimize long term operational costs for tenants and the housing provider. Refer to section 6.3 (6);
5. Demonstrate good urban planning, site plan and architectural design principles to ensure practical and functional living and amenity space, and a high quality of life for tenants. Proposals are to be of quality residential design that is compatible with the surrounding community and in accordance with the City's Official Plan and any applicable secondary plans and guidelines;
6. For the development of mixed income communities, include no less than 60% of units with below average market rents and a maximum of 40% of units with average market rent. Proponents are encouraged and expected to exceed this

minimum affordability requirement where possible to provide greater affordability to low income households; and

7. Integrate and leverage community resources and the capacity to provide capital and operational support to the development of new affordable housing.

2.3 Project Schedule

The project milestones are:

- | | |
|---|----------------------------------|
| ▪ RFP Issued | July 5th, 2017 |
| ▪ Deadline for Inquiries | August 25 th , 2017 |
| ▪ Final update to online Q & A page | September 8 th , 2017 |
| ▪ Closing/Submission of RFP | October 4 th , 2017 |
| ▪ Selection Committee Meeting | October/November 2017 |
| ▪ Selection of Proponent | October/November 2017 |
| ▪ Provincial Approval | November 2017 |
| ▪ Signing of the Contribution Agreement | December 1, 2017 |
| ▪ Construction Start | May 2018 |

2.4 Action Ottawa Incentives and Project Budget

The City has allocated up to \$10M from Year 3 of the IAH 2014 Extension and SIF program streams, and \$8M² under the HFG program to facilitate the development of new affordable rental housing.

Incentives under this RFP include the following:

1. Under IAH funding, Capital Grant up to \$120,000 per dwelling unit for a project or a specific number of affordable units within a larger project (e.g., 10 units funded in a 50 unit project);
2. Under IAH funding, additional Capital Grant funding up to \$30,000 per dwelling unit for a total capital grant of \$150,000 per dwelling unit may be considered for accessible units, supportive units or larger units (i.e. units of 4 or more bedrooms);
3. Under HFG funding, Capital Grant up to \$150,000 per dwelling unit for a project or a specific number of affordable, supportive units within a larger project;
4. Relief from municipal development charges, planning application fees and parkland levies;
5. Reduced municipal property taxes (equivalent to the residential rate);
6. Grant in lieu of building permit fees; and

² \$8M is the estimated amount based on the requested provincial funding. The actual amount of available funding will be determined once the provincial government has awarded funds and all funding is approved by City Council.

7. Grant in lieu of school board development charges.

2.5 Legal Agreements and Checklists

The successful proponent(s) will be required to enter into a Municipal Housing Facilities Agreement or a Contribution Agreement with the City of Ottawa. The agreement must be executed by December 1st 2017.

Sample copies of these agreements will be available upon request. **Appendix D** provides additional information on the contribution agreements.

Sample agreements may be obtained by sending an email to:
affordablehousingunit@ottawa.ca.

3.0 Submission of Proposal

3.1 Submission Package

The submission package includes two parts:

- an Application Form, and
- a Proposal Submission

The material for both parts must be provided in a clear and concise manner. Proponents are required to submit printed copies of both parts (1) and (2), and one complete electronic version on CD or memory stick, in MS Word or Adobe pdf, (with the capital and operating budget template in Microsoft Excel).

The City reserves the right to accept or reject any or all submissions received, and to seek clarification from one or more Proponents on the contents of their submission. The Proponent is responsible for any and all costs associated with its submission.

1. Proponents must provide one (1) bound copy of a complete **Application Form**, which includes:
 - a. Signed Signature Page
 - b. Signed Conflict of Interest Form; and
 - c. Reference Forms

All signed forms must be originals; copies will not be accepted. If any of parts a - c are missing or incomplete, the City reserves the right to disqualify the submission without further review of the contents.

2. Proponents must provide ten (10) bound copies of a complete **Proposal Submission**. The Submission must include the following sections:

- a. Mandatory Eligibility Requirements (**Form A**)
- b. Proponent and Development Team Competencies (**Form B**)
- c. Examples of Similar Projects (**Form C**)
- d. Project Description and Design Concept
- e. Property Information (**Form D**)
- f. Project Milestones (**Form E**)
- g. Project Viability including Capital and Operating Budgets (using Excel template provided)
- h. Organizational Structure and Property Management (**Form F**)
- i. Proponent Equity Contribution (**Form G**)

Sections *5.0 Mandatory Eligibility Requirements* and *6.0 Core Rated Criteria* detail the requirements of each part noted above.

3.2 Time of Submission

All printed and electronic copies must be submitted in a sealed envelope, clearly identified as to the contents, **no later than 3:00 pm, Wednesday October 4th, 2017.**

3.3 Submission of Proposal

All Proposals submitted in response to this solicitation shall be delivered and addressed to the following:

City of Ottawa
Supply Services
100 Constellation Drive
4th Floor West Tower
Ottawa, Ontario K2G 6J8
Title: Action Ottawa Request for Proposals 2017

Proposals shall be received NO LATER THAN 3:00 P.M. LOCAL TIME ON ***WEDNESDAY, 04 OCTOBER 2017.*** Proposals received after the above due date and time will not be considered, and will be returned, unopened, to the Proponent.

3.4 Submission Length, Format and Content

The required information must be provided by filling out the Forms provided. In addition to the required Forms, the Excel spreadsheets, and the required drawings, submissions may be a maximum of an additional 20 pages (or 10 double sided sheets of paper) in length.

Submissions must be in a professional format, on letter size sheets, in a minimum 11 point Arial font. Submissions must include an index, page numbers and tabs, and must address all of the Mandatory Eligibility Requirements and Core Rated Criteria in the order in which they appear in the RFP.

Proponents must address the City's requirements as outlined in this document. Failure to respond to all of the Mandatory and Core Rated Criteria will disqualify the proposal.

3.5 Proposal Validity

Proposals shall remain valid and open for acceptance by the City for a period of **one hundred and twenty (120) calendar days**, following the due date for receipt of proposals.

Each submission will be evaluated solely on its content. Evaluation of the submission commences immediately after the closing date. **The City does not accept submissions submitted by facsimile transfer machines or electronic mail.**

4.0 Evaluation

4.1 General Evaluation

The evaluation of proposals occurs in two stages. Proposals that fail to meet the requirements at any stage will not advance to the next stage. The Proponent selection is subject to available funding; approval of the City of Ottawa, approval of the Ministry of Municipal Affairs and Housing (MMAH), and successful negotiation of a funding agreement with the City's Housing Services Branch.

Stage One: Mandatory Eligibility Requirements

The mandatory criteria are described in Section 5.0 and an eligibility checklist is provided in **Form A**. Proposals will be evaluated to ensure all mandatory eligibility requirements are met. Proposals failing to meet **any one** of the eligibility requirements will be disqualified from further evaluation. Incomplete forms will also disqualify the proposals from further evaluation.

Stage Two: Core Rated Criteria

The Core Rated Criteria are described in Section 6.0. Proposals must achieve 70% or greater on **each** of the core evaluation criteria in order to be considered. Proposals failing to achieve 70% or higher will be eliminated from the competition.

The proposal(s) with the highest score will be selected for funding.

4.2 Selection Methodology

The Selection Committee will be comprised of City staff and external members with expertise in finance, housing construction and/or residential development. All submissions will be reviewed and scored using a consensus approach in relation to the criteria and points that are identified.

Recommendations from the Selection Committee will be forwarded to the MMAH for approval.

The City reserves the right to request clarifications from one or more of the Proponents and may request a presentation from one or more proponent teams prior to finalizing project scores during Stage Two of the selection process.

5.0 Evaluation: Mandatory Eligibility Requirements

5.1 Financial Viability

The Proponent must be incorporated provincially or federally. The Proponent must provide **one copy** of:

- Proof of Incorporation,
- Annual Report for the two (2) most recent years available, and
- Audited Financial Statements.

If the Proponent does not have Audited Financial Statements, the Proponent must submit a letter from a financial institution or accountant providing assurance to the City that the Proponent has been, and is financially viable and solvent as a going concern, it has the financial capacity to complete the project, and that undertaking the project will not place any undue financial burden on the Proponent.

If the Proponent has been formed through a partnership or other joint venture to develop and/or manage the project, information about each member organization is required. The legal nature of the relationship and the roles and responsibilities of each party must be described, providing details of how and when the parties have worked together in the past.

If a subsidiary corporation is to be used for development or management purposes, information on both the parent and subsidiary corporations is required.

5.2 Written Confirmation of Partnerships

If the Proponent is working in partnership with another organization where there is an equity interest or support service arrangement, the Proponent must provide written confirmation from the partner agency. That written confirmation must **demonstrate the nature of the partnership and state clearly what the partner agency is agreeing to provide**. This written confirmation must include a resolution of the Board of Directors of the partner organization.

5.3 Affordable Rent Requirements

Rents for units funded under Action Ottawa must not exceed the most recently published Canada Mortgage and Housing Corporation (CMHC) Average Market Rent (refer to **Appendix E**). The weighted average of all the rents must not exceed 80% of the Average Market Rent. Rents may be mixed so that at least 60% of the units provided be at rents at 70% of AMR to be affordable to lower income households. Where appropriate, lower rent units must be rented to tenants drawn from the CWL. Rents are to be documented in the Operating Budget tables.

5.4 Pre-consultation with Planning Services

The Proponent must meet with a City Planner from Planning Services – Development Review prior to submitting their proposal. The purpose of the meeting is to obtain information including:

- If the proposal meets the City’s objectives as laid out in the Official Plan and what expectations the City has with regards to the proposal,
- If the proposal meets the requirements of the Zoning By-law and if a Zoning By-law Amendment will be required
- What planning or technical issues affect, or may affect, the proposal
- Which studies, reports and applications will be required (e.g. minor variance, zoning amendment, severance)

Include the date and details of this meeting with this RFP submission and identify if any development applications that are in process. If any of the technical issues or approvals may affect the development (e.g. alter the proposed project timelines presented in the RFP) this must be stated.

To ensure that the information is provided with the RFP submission, consult Planning Services well before the RFP submission deadline; however, so that the information is current, the meeting must not be earlier than 6 months before the RFP submission.

5.5 Consultation with existing tenants

If the proposed project is an addition to an existing building or complex, the Proponent must meet and consult with the existing tenants prior to submitting their proposal.

The purpose of the consultation meeting(s) is to:

- Inform the existing tenants of the details of the proposed project, including number of units and construction timing.
- Discussion issues that would affect the existing tenants, and
- Address any concerns or questions presented by the tenants.

Provide the details of all meetings and meeting minutes with this RFP submission.

5.6 Letter from Financial Institution or Lender

The Proponent must include documentation from a reputable Financial Institution or Lender indicating that the lender has reviewed the proposal and that the project can be considered for financing based on their preliminary review. The documentation is to include the branch address, the name and title of the letter author.

5.7 Insurance Requirements

At the time of execution of contracts with the City, the Proponent shall be required to provide proof of insurance from a reputable, licensed insurance broker. The Proponent is responsible for obtaining a comprehensive contractor-controlled insurance program, acceptable to the City, to protect the Proponent, its team members, contractors, sub-contractors, consultants, and the City. Proponents must read the mandatory insurance requirements set out in **Appendix F** and include the cost to meet these requirements in their capital budget.

5.8 Good Standing with the City of Ottawa

The Proponent must be in good standing with the City of Ottawa with respect to any existing contracts. The Proponent must not be in receipt of a Notice of Breach of any existing contracts that has not been rectified to the City's satisfaction, by the time of closing of this RFP.

5.9 Proponent Equity Requirement Based on Project Value

The project value is the actual cost to construct the project (hard and soft costs) and the value of the land as presented in a capital budget approved for mortgage insurance purposes.

- For-Profit Proponents require a minimum contribution of 10% of the project value
- For-Profit in partnership with a Non-Profit corporation require a minimum contribution of 4%
- Non-Profit Proponents require no minimum contribution, however it is strongly encouraged, as it forms part of the evaluation criteria in Section 6.6.

The minimum proponent equity requirement must be clearly defined and illustrated in financial terms.

- When using the value of land as equity, a ratio of no more than \$20,000 per dwelling unit may be used and will be applied in the evaluation.
- For sweat equity, proponents must clearly define the sweat equity contribution and assign a cash value equivalent to that which would be required if such a service were procured through the design and/or development process.
- For fundraising, provide the target amount to be raised, the amount committed to date and the actual amount of fundraised money that the Proponent currently holds. For charitable organizations proposing capital fundraising campaigns, you must provide evidence (e.g., a previous capital campaign) of your ability to reach your fundraising target.

5.10 Unit Size and Minimum Unit Count

Rental units must not exceed the maximum unit sizes listed below, or be less than the minimum. Modest exceptions to the maximum unit size can be made for units that are wheelchair accessible.

A minimum of 3 dwelling units, post completion, is required for proposals to be accepted and funded.

Unit Type	Bachelor/Studio unit	One Bedroom	Two Bedroom	Three Bedroom	Four Bedroom
Apartment	41.8 m ²	60.4 m ²	79 m ²	92.9 m ²	111.5 m ²
Townhouse	N/A	65.0 m ²	83.6 m ²	102.2 m ²	120.0 m ²

5.11 IAH (2014 Extension) Requirements

The MMAH states that the use of energy efficient features in building design and ENERGYSTAR-rated products should be used when available.

Energy Efficiency: Proponents are to utilize energy efficiency features in building design and ENERGYSTAR-rated products

Suite Meters: The IAH Program requires that suite meters be installed in all new social and affordable housing units. The *Energy Consumer Protection Act, 2010* and Ontario Regulation 389/10 set out the rules for suite meter installation. For further information, contact the Ontario Energy Board's (OEB) Consumer Relations Centre at 1-877-632-2727 or 416-314-2455, or go to ontarioenergyboard.ca.

Note that although suite meters are required to be installed, there is no requirement to bill tenants directly as a result of suite metering.

Confirmation of Employment of Apprentices

The IAH (2014 Extension) promotes and supports the use of apprentices and the training of skilled labour. Under the IAH, the City is required to give priority consideration to the employment of apprentices in the residential housing sector during the project evaluation and selection process and is required to report on the initiatives/activities used to promote or support apprentices, the number of apprentices employed in each project, and the type of trade the apprentices are training in. Successful Proponents will be required to confirm the employment of apprentices and provide report(s) confirming such employment to the satisfaction of the City and MHO.

Canadian Environmental Assessment Act 2012 (CEAA)

Projects approved under the IAH (2014 Extension) must be in compliance with the CEAA 2012.

6.0 Evaluation Core Rated Criteria

6.1 Proponent Team and Competencies

The Proponent is the lead organization who will own and operate the proposed building(s) once completed. This RFP is seeking a Proponent with the existing ability and credentials to properly manage and operate the new project. Proponents must provide a detailed organization/company profile and respond to each criterion set out below.

The focus of this RFP is on selecting a Proponent, lead organization with experience in providing affordable rental and/or supportive housing. Proponents may choose to include a development consultant and/or architect as part of their team in response to this RFP; however, Proponents are not required to do so.

Proponents who chose not to include a development consultant and/or architect will not be considered at a disadvantage³. Proponents may also choose to hire an individual or firm(s) to prepare the response to this RFP only, with no further commitment to that individual or firm(s).

If Proponents select to include a development consultant and/or architect as part of their team in the RFP response, the Proponent will be required to show that the team members were selected based on a clearly defined statement of work and a transparent and competitive procurement process. Fees must be justified and rates charged are expected to demonstrate fair market value. Proponents must fully document and submit evidence (1 copy) of their entire procurement process, including bid documents, all submission and evaluation criteria⁴.

If Proponents select to include a development consultant and/or architect in their submission, the same development consultant and/or architect will be required to see the project through to completion, should the Proponent be successful.

General contractors are **not** to be included in a Proponent's response to this RFP.

Complete **Form B** demonstrate the experience and expertise of the proponent organization, its staff, and any team members who will be involved in the proposed project, in each of the following areas:

1. Project Management
2. Development experience with affordable housing projects
3. Planning and Building processes
4. Public Consultation Experience
5. Experience with competitive procurement processes for projects of a similar scale
6. Rental housing property management
7. Working with a variety of community and public sector interests

Once the RFP is awarded, the successful proponent(s) will be required to undertake a competitive process to procure all of the required consulting, building design and construction services.

The proponent will be required to fully document and retain evidence of their procurement processes, including bid documents, submission and evaluation criteria.

³ Proponents who may need assistance in the preparation of their proposals, may seek funding from the CMHC via the [Seed Funding Program](#)).

⁴ The material is to be submitted as an Appendix to the RFP submission. The Appendix will not be counted towards the maximum page count of the RFP submission.

The proponent will be required to supply the City with any or all of the procurement and selection materials upon request by the City. The City has the right to cancel the RFP award if fair and competitive procurement procedures are not being followed.

6.2 Examples of Similar Projects

Use **Form C** to describe at least one and a maximum of two similar projects. The examples must be built, occupied and of similar scale, scope and management/operational structure to the proposed project.

The examples will be reviewed for applicability/comparability to the proposed development project. References will be used to validate information provided by the Proponent and to determine the organization's standards after taking over the building maintenance and operations.

6.3 Project Description and Design Concept

Provide a brief project description and design concept plans which must include the following:

1. **Property Information:** complete **Form D**
2. **A conceptual site plan:** clearly illustrated building footprints, egress and access points, parking, and dimensioned setbacks from the property lines. The site plan must include a zoning compliance table. The site plan must reflect tenants' requirements as well as issues of neighbourhood compatibility, scale and integration.
3. **Proposed floor plans:** clearly illustrated plans with all proposed spaces on typical floors (e.g. lobby, laundry, units etc.) labelled.
4. **Proposed unit plans:** clearly illustrated plans with all dimensions of the living space (kitchen, bathrooms, living rooms and bedrooms) of typical units labelled. Bedroom size dimensions are to be labelled separately from the closet space and other obstructions. Dimensions of accessible areas must be clear.
5. **Building elevations:** clear elevations of all facades. Additionally, at least one elevation of the building within its streetscape context must be provided; the elevation should show a minimum of two properties on either side of the proposed building. The design of proposed buildings is expected to be sensitive to the adjacent context and the abutting land uses.
6. **Sustainable/ Energy Efficiency Features:** a clearly and concisely itemized list of the main elements aimed at achieving maximizing energy efficiency and sustainability. Provide the information in a table format and for each element, state if

it complies with or exceeds the 2012 Ontario Building Code requirements, or any more current updates to the OBC.

7. **Accessibility:** a minimum of 10% of units that are barrier free and for the provision of units that are designed to permit a person with a physical disability to visit – or designed for “visit-ability”. Given that the design criteria for households and individuals with disabilities vary considerably, units should be designed to be as adaptable as possible. Criteria for accessibility and visitability are included in **Appendix C**. Proposals must identify the number of both accessible and visitable units provided.
8. **Proximity to Support Service Networks:** The distance to public transit, employment supports, schools and other key services are accurately labelled and shown on a map. Projects are expected to be in close proximity to these and other relevant amenities and services.

Note: All design concepts must be prepared by a licensed architect. Items 2 – 5 may be on 11x17” sheets.

Inaccuracies in project design can result in misleading hard and soft cost estimates, including an incorrect overall cost per unit. The City has the right to cancel the RFP award, if inaccuracies in the RFP submission result in significant design changes. Significant design changes may include, but are not limited to: a reduction in the number of units, a reduction in the size of units, and/ or unforeseen engineering, technical and/or environmental issues that were not included in the original proposal.

Through the design and construction process, any proposed changes to the project design must be discussed with Affordable Housing Unit (AHU) staff prior to any decisions being made. If any changes are made without first discussing with and securing the agreement of AHU staff, funding will be reallocated.

6.4 Project Viability

The Selection Committee will assess the development timeline, capital budget, operating budget, proposed financing, and value for money. The City conducts a detailed financial analysis of the project including a 25-year cash flow analysis, mortgage viability test, and comparison of operating costs to industry norms. This analysis helps to determine whether the project as presented is feasible, viable and sustainable.

Proposal must include:

1. A construction project schedule/development timeline in an 11x17”.
2. **Form E – Milestone Schedule.** Note that projects that have available and appropriately zoned land, and that are construction ready or advanced in the planning approvals process will score more favourably.
3. Complete Capital and Operating budget forms in Microsoft Excel (use templates provided). Failure to submit the complete budget forms will result in the proposal being considered non-responsive and the proposal will be disqualified.
4. Supportive Housing Proposals must also complete the supportive housing operating budget template provided.
5. A Class D construction estimate and any supporting documentation.

This analysis of project viability is important as there are no ongoing subsidies provided for the ongoing operation of the project. The project must be able to generate a reasonable cash flow to ensure that unexpected changes in revenue do not jeopardize the viability of the project in the long term. While the financial institution is interested in protecting its investment in the market value of the project, the City is interested in protecting its investment in the long-term affordability of the project.

The City also conducts an analysis to determine value for money. What is the City getting back in terms of affordability from the investment? The City applies standard construction costs to determine an economic (breakeven) rent for the project based on what it would theoretically cost to construct and operate the project without capital subsidy from the City. The difference is then calculated between the economic rent and the affordable rent that will be charged. The dollar value of this difference is calculated over 35 years. The value of the “return” (affordable rent) is measured against the total value of the government investment of land, grants and fee relief (“City Investment”).

6.5 Organizational Structure and Property Management Plan

Proponents must explain their organizational structure and provide a property management plan explaining how property management and tenant engagement for the entire building will be carried out. The intent of this criterion is to illustrate how capable the lead proponent is in terms of managing the project once complete.

Complete **Form F** to detail the Organizational Structure and Property Management Plan.

1. Community Development Initiatives - Tenant engagement, support services and security;
2. Building and unit repairs, maintenance and management;
3. Experience working with the CWL;
4. Experience with collecting and dealing with arrears, bad debt and vacancy losses;
5. Financial systems and internal control processes that support effective management and accountability;
6. Budgeting, financial review and monitoring, and long-term planning processes; and
7. A list of all members of the Board of Directors, and an explanation of the Board's engagement, expertise and involvement in strategic planning and operations.

6.6 Proponent Equity Contribution

Describe the Proponent's contribution to the project and how community contributions will be leveraged. The IAH (2014 Extension) and the City encourages Proponents to provide additional contributions that improve financial viability and affordability as well as access to supports.

Private sector proponents must contribute a minimum of 10% equity to the project. Private sector proponents with a non-profit partner are required to contribute a minimum of 4% equity to the project. There is no equity requirement for non-profit Proponents, however all Proponents are encouraged to contribute resources to the project that may include equity, in-kind contributions, benevolent financing, sweat equity, donations, support services, etc. Proponents demonstrating a contribution in excess of program requirements will be scored on the basis of what they are contributing and how well their project leverages other resources.

For charitable organizations proposing capital fundraising campaigns, you must provide evidence (e.g., a previous capital campaign) of your ability to reach your fundraising target.

7.0 Evaluation Scoring

7.1 Core Evaluation Criteria:

A minimum score of 70% from the Selection Committee is required on each of the Core Criteria in order for the project to be considered under the RFP evaluation scoring process.

Stage Two Core Criteria	Max Score	/	Min Pass
1. Proponent Team & Competencies	15	/	10.5
2. Examples of Similar Projects	10	/	7
3. Project Description & Design Concept	20	/	14
4. Project Viability	20	/	14
5. Org Structure & Property Mgt Plan	20	/	14
6. Proponent Equity Contribution	15	/	10.5
Total Possible Score	100	/	70

8.0 Supplemental Information

8.1 Availability of Document

Copies of this Request for Proposal (“RFP”) are available from either the MERX Distribution Unit, telephone 1-800-964-6379 or via the Internet at www.merx.com, or by contacting the City’s Affordable Housing Branch at telephone 613-580-2424 x12300 or (AffordableHousingUnit@ottawa.ca). MERX and the City’s Affordable Housing Branch are the official and sole distributors of this RFP and any addenda. If a Proponent obtains this document by means other than through MERX or the City’s Affordable Housing Branch, the accuracy of the document and receipt of any addenda are the sole responsibility of the Proponent.

A Word version of the RFP is available to all Proponents. The document will be provided for the sole purpose of facilitating the preparation and presentation of a proposal in the response to this RFP. This RFP and any resulting addenda as published by MERX and the Affordable Housing Branch shall take precedence over the Word document issued by the City of Ottawa.

8.2 Inquiries and Addenda

All inquiries and questions regarding this RFP must be directed to the Contracting Authority specified herein. Inquiries and questions must be provided, in writing (by email)

no later than the date outlined in Article 2.3 – Project Schedule. The Contracting Authority will provide answers to inquiries to all Proponents by written addenda throughout the question and answer period without naming the source of the inquiry. The final addendum (or answers to questions received) will be released no later than the date outlined in Article 2.3 – Project Schedule. It is the responsibility of the Proponents to confirm that the Contracting Authority has received their inquiries.

The City will respond to questions about the RFP, received via email, on or prior to August 25th, via a Question and Answer page on Ottawa.ca (<http://ottawa.ca/en/residents/social-services/housing/affordable-housing>).

The Question and Answer page will be updated regularly, with the final update by September 8th.

Contracting Authority:

Affordable Housing Unit Telephone: (613) 580-2424 x12300
E-mail: AffordableHousingUnit@ottawa.ca

8.3 Changes to the Project Design

The City will not allow substantial modifications to the scope of the proposed development subsequent to the RFP submission closing date without the prior written consent of the City, which consent may be withheld by the City, unless otherwise directed by the Selection Committee.

8.4 Changes to the Proponent’s Team

The City will not allow the replacement, substitution or addition of the identified members of a Proponent’s team subsequent to the RFP submission closing date without the prior written consent of the City, which consent may be withheld by the City.

In addition, any change, replacement, substitution or addition of a principal member of a Proponent’s team subsequent to the RFP closing date may be grounds for disqualification without the prior written consent of the City.

8.5 Team Membership

The Proponent or Lead Team Member may not form part of more than one Proponent Team.

8.6 City Procurement Policies

Municipal Freedom of Information and Protection of Privacy Act

The City of Ottawa is subject to the Municipal Freedom of Information and Protection of Privacy Act, R.S.O. 1990, c.M.56, as amended (“MFIPPA”) with respect to, and protection of, information under its custody and control. Accordingly, all documents provided to the City in response to this Request for Proposals may be made available to the public unless the party submitting the information requests that it be treated as confidential.

Unless any information is specifically designated by the Proponent to be confidential, the Proponent hereby consents to disclose any information contained in its submission pursuant to the Municipal Freedom of Information and Protection of Privacy Act.

Proponents should clearly indicate any confidential information by stamping the page where it appears with the word “confidential”. The Proponent should make it very clear as to which information is considered to be of a confidential or proprietary nature.

All information is subject to MFIPPA and may be subject to release under the Act, notwithstanding your request to keep the information confidential.

8.7 Conflict of Interest

Proposals are required to disclose to the City any potential conflict of interest. If a conflict of interest does exist as referred to above, the City may, at its discretion, withhold consideration of the submission until the matter is resolved to the satisfaction of the City.

If, during the RFP or negotiation stages of the process, a Proponent is in a conflict of interest or perceived conflict of interest, the Proponent shall so inform the City and if a significant conflict of interest is deemed to exist by the City, then the Proponent shall remove itself from the process or take such steps as are necessary to remove the conflict of interest.

8.8 Code of Conduct for Proponents

The City is committed to a selection process that is open, fair and defensible to all parties concerned and, to these ends, the proponents must adhere to the code of conduct stipulated in these general terms and conditions.

In order for the City to provide the private sector with a consistent and efficient point of contact during the RFP process, all requests for information or clarification are to be made in writing and directed only to the Contracting Authority.

8.9 Confidentiality and Disclosure of Information

Proponents must not disclose any details pertaining to their submission and the selection process, in whole or in part, to anyone not specifically involved in their submission without the prior written approval of the City.

Proponents shall not issue a news release or other public announcement pertaining to details of their submission, or the selection process, without the prior written approval of the City.

Except as noted, communications between the Proponents or their Team Members and the City shall be treated as confidential during as well as after preparation and submission of the response to the RFP. In the event of any such breach of confidentiality by the Proponent, the City at its sole and absolute discretion, may at any time reject any RFP submission by the Proponent without further consideration and terminate that Proponent's right to continue in the process.

It is the requirement of this RFP for the potential Proponent to treat all information obtained in connection with or arising out of this RFP process as property of the City.

Proponents must treat all information in a highly confidential manner and not use this information for any purpose other than for replying to this RFP and for the fulfillment of any related Agreement for the RFP phase. Without limiting the generality of the foregoing, Proponents who are short-listed and/or invited to participate in interviews or any aspect of the RFP process subsequent to submissions, shall keep highly confidential all such developments and participation. All information pertaining to recommendations and information collected and processed for the City are for the sole purpose of the City at its discretion.

Information communicated by the City to the Proponent, or by the Proponent to the City, in the course of responding to this RFP shall not be either divulged or issued by the Proponent on any other project unless prior approval in writing is obtained from the City.

Further, any information that is not common knowledge, and may therefore be considered confidential by the City that is acquired in the course of responding to this RFP, shall not be used or divulged by the Proponent unless prior approval in writing is obtained from the City.

Notwithstanding the foregoing, the obligation of confidentiality shall not pertain to information which was, at the time of disclosure, or thereafter became part of the public domain; is required to be disclosed by law or court order, where in such cases, all reasonable attempts will be made to notify the City in advance of doing so.

All correspondence, documentation and information provided to the City by every Proponent in connection with, or arising out of this RFP, and the submission of any

Submission shall become the property of the City, and as a result, such Submissions are subject to Freedom of Information requests. Accordingly, Respondents are requested to identify any information in the Submission that, if disclosed, could cause injury. The City will make every effort to maintain the confidentiality of such information, but the Proponent must be aware that the information may become public through requests for information due to the need for transparency and accountability in decisions made by the City. The City shall not be liable if any such confidential information becomes public or is disclosed.

8.10 Claims or Litigation

The City reserves the right not to accept a submission from any person or corporation which includes all non arms length corporations who, or which, have a claim or instituted a legal proceeding against the City of Ottawa or against whom the City has a claim or instituted a legal proceeding with respect to any previous contracts, bid submissions or business transactions.

8.11 No Collusion

Proponents must ensure that their participation in the selection process is conducted fairly and without collusion or fraud. Proponents and their Team Members shall not discuss or communicate, directly or indirectly with any other Proponents regarding the preparation or submission of their responses to this RFP.

8.12 No Lobbying

Proponents or their Team Members or anyone involved in the Team will not engage in any form of political or other lobbying whatsoever with respect to this project or to influence the outcome of the process. In the event of any such lobbying, the City, at its sole and absolute discretion, may at any time reject any RFP submission by that Proponent without further consideration and terminate that Proponent's right to continue in the process. All correspondence or contact by interested parties with the City must be directly and only with the City's Contracting Authority, identified herein.

8.13 Liability for Expenses or Damages

The City will not be liable for any loss or damage suffered by any Proponent including, without limitation, any expenses incurred in the preparation and submission of the proposal or from the demonstration of goods or services. There will be no honorariums provided for this submission.

8.14 Due Diligence

The Proponent is advised that information provided by the City does not constitute a City position nor guarantee of future demand, and the Proponent should conduct their own due diligence with respect to all aspects of their proposal.

8.15 Limitation of Liability

- a. The Proponent shall not hold the City of Ottawa, or any of its officers, employees, assigns, independent contractors, subcontractors, agents or representatives liable for any error or omission in any part of this RFP. While the City has used considerable efforts to ensure that all information contained in this RFP is accurate, the City does not guarantee or warrant that the information contained in this RFP or any supplemental documents is accurate, comprehensive or exhaustive. Nothing contained in this RFP is intended to relieve the Proponent from forming its own opinions and conclusions with respect to the matters addressed in this RFP.
- b. Each Proponent is solely responsible, at its own cost, for conducting its own independent research, due diligence and any other work or investigations or for seeking any other independent advice necessary for the preparation of proposals and, if selected, for entering into the Partnering Agreement.
- c. The City and any of its officers, employees, assigns, independent contractors, subcontractors, agents or representatives shall not be liable to the Proponent or any of its officers, employees, assigns, independent contractors, subcontractors, agents or representatives (collectively "The Proponent's Personnel") for any losses, expenses, costs, claims, damages, including incidental, indirect, special or consequential damages, or liabilities arising out of or by reason of or attributable to this RFP.
- d. The Proponent shall indemnify and save harmless the City and any of its officers, employees, assigns, independent contractors, subcontractors, agents or representatives from all costs, losses, damages, including incidental, indirect, special and consequential damages, liabilities, expenses, judgements, claims, demands, suits, actions, causes of action, contracts or other proceedings of any kind or nature:
 - (i) based on, occasioned by, or attributable to anything done or omitted to be done by the proponent or the proponent's personnel in connection with this RFP;
 - (ii) asserting infringement of any patent or other intellectual property right by the Proponent in responding to this RFP.

- e. If the City or any of its officers, employees, assigns, independent contractors, subcontractors, agents or representatives is made party to any litigations arising out of or by reason attributable to this RFP, then the applicable Proponent shall indemnify and save harmless the City and its officers, employees, assigns, independent contractors, subcontractors, agents or representatives in connection with such litigation, except to the extent that such litigation arose from the negligence or willful act of the City or any of its officers, employees, assigns, independent contractors, subcontractors, agents or representatives while acting within the scope of his or her or its employment engagement.

The City may, at its option, and at the expense of the Proponent, participate in or assume carriage of any litigation or settlement discussions relating to the foregoing, or any other matter for which the Proponent is required to indemnify the City and any of its officers, employees, assigns, independent contractors, subcontractors, agents or representatives. Alternatively, the City may require the Proponent to assume or maintain carriage of a responsibility for all or any part of such litigation or discussion, at the Proponent's expense.

The provisions in (a)(b)(c)(d) and (e) shall survive the termination of the RFP process and the execution of the partnering Agreement.

8.16 Amendments To and Cancellation of Process

The City reserves the right to amend, extend the closing, suspend, postpone, or cancel the RFP and future stages of the partnering process at any time and for any reason, and the Proponent shall have no recourse against the City.

Appendix A – Mixed Composition Housing

While many Ottawa residents enjoy a good standard of living, over 100,000 residents live in poverty and as such, struggle to find affordable housing. Rising housing-related costs have a disproportionate effect on low income households, where families and individuals have to choose between heating their homes, buying groceries or paying the rent. The lack of affordable housing is one of many complex sets of factors that lead to homelessness.

Mixed Composition Housing:

The proposed mixed composition affordable housing may include partnerships that provide housing units with supports for priority groups identified by the federal and provincial governments including youth, homeless individuals transitioning from provincial institutions, seniors, Indigenous people and persons living with a physical disability who can live independently but require a modified unit, as part of their proposal.

Funding the development of mixed composition affordable housing creates diverse and prosperous communities where individuals and families can work, live and play. Also, providing for a mix of affordable dwelling types helps to create and maintain economically-sustainable communities as units can be made available to a variety of households with varying needs and adapted over time. This priority will also provide existing social housing providers an opportunity to strengthen their portfolios and provide increased options for households on the Centralized Waiting List and for households who are over housed and looking to remain in their community. However, unlike social housing, mixed income composition affordable housing projects do not receive ongoing operating funding.

The City will consider mixed composition affordable housing projects that provide good value for money and strengthen the long term affordable rental housing infrastructure in the City.

Appendix B – Supportive Housing Description & Requirements

Increasing the supply of supportive housing is a key objective of the City's Ten Year Housing and Homelessness Plan. The City recognizes the importance of providing a variety of supportive housing options to ensure that our most vulnerable residents have access to housing and the supports they need to retain their housing over the long term. Consistent with our 10 Year Plan and federal and provincial funding priorities for supportive housing projects are:

- People experiencing chronic homelessness (6 months or more in a calendar year) with a focus on those with the longest shelter stays
- Youth
- Indigenous
- People exiting provincial institutions (corrections/hospital) with no fixed address

Potential tenants requiring supportive housing will be individual men, women and youth who may be:

- Individuals with physical disabilities and/or mental health and/or addiction issues (including concurrent disorders);
- Individuals with a developmental delay and/or dual diagnosis;
- Individuals with acquired brain injury.

Proponents seeking to develop supportive housing must also complete and provide the supportive housing operating budget template. Units must be affordable to individuals and households in receipt of Ontario Disability Support Program (ODSP) maximum shelter allowance and/or room and board.

In addition, the City and successful proponent(s) will negotiate a financial contribution per individual from operating sources such as the Community Homelessness Prevention Initiative. The average contribution from the City, combined with the ODSP shelter amount and/or room and board maximums, will not exceed \$1600 per month (inclusive) per individual using one of two models below:

Rent Model

- ODSP max shelter allowance of \$479 per client (\$15.96 per day)
- City operating subsidy up to a max of \$37 per day per client

Room and Board (R&B) model

- ODSP R&B max rate \$796 + Special Boarder allowance of \$60,
- Tenant must retain minimum \$143 Personal Needs Allowance
- City per diem \$51.00 per day **minus** R&B amount

Operating funding will be dependent on the support service model proposed by the successful proponent and the needs of the clientele (moderate to high)

Proponents are expected to seek additional funding from other organizations such as the Local Health Integration Network (LHIN) for specialized clinical (mental health/addiction supports, nursing, personal support workers, occupational supports etc.) and/or fundraising.

Projects considered for operating funding are expected to range from approximately 7 to 40 or more single room occupancy type units suitable for individuals from the four priorities who need moderate to intensive supports to achieve housing stability.

Housing preferences, identified through surveys of shelter residents and studies of successful supportive housing communities indicate that most shelter residents prefer their own room with a private bathroom (single room occupancy). Successful supportive housing communities must also provide incentives for individuals experiencing homelessness to leave the shelter system. This can be accomplished through appropriate planning and design of a building and its facilities, the right mix of residents and support options, and programming and social enterprise opportunities creating a sense of community and social cohesion.

Support options may include, but are not limited to:

- Case management
- Community development
- Supports for people with physical disabilities;
- Support services such as meal preparation, medication management and light housekeeping; and
- On site supports through portable treatment/support teams.

Appendix C – Accessible Unit & Universal Design Standards for Visitable Housing

Accessible Unit Standards

Accessible units are designed for occupancy by people with disabilities. Individual dwelling units should be designed for easy access and comfortable use by persons with a wide range of physical disabilities. Under Action Ottawa, accessible units for individuals with special needs must conform to the design criteria as described in CAN/CSA B651-12 Accessible Design for the Built Environment.

A copy of this standard is available at the Main Branch of the Ottawa Public Library Reference Department for short-term use. The Main Branch of the Library is located downtown at the corner of Metcalfe and Laurier.

A hard copy or searchable PDF version may be purchased from the Canadian Standards Association - *Cost: \$138.00*

To Purchase:

Online go to Canadian Standards Association website:

<http://shop.csa.ca/en/canada/accessibility/b651-12/inv/27021232012>

OR contact Canadian Standards Association directly:

1-800-463-6727

sales@csa.ca

Tel: (416) 747-4044

Fax: (416) 747-2510

5060 Spectrum Way, Suite 100

Mississauga, Ontario

L4W 5N6

Universal Design Standards for Visitable Housing

One of the objectives of the Action Ottawa program is the creation of units that are accessible for individuals with limited mobility. Visitable housing standards are intended to create homes that are welcoming to individuals who use wheelchairs, walkers or have some other form of mobility impairment. “Visitable” features are easy to construct on most terrain and are visually unnoticeable.

The Accessibility Committee of the City of Ottawa produced a document entitled *Accessible Design Standards*. This document is available on the City’s website at: http://documents.ottawa.ca/sites/documents.ottawa.ca/files/documents/accessibility_design_standards_en.pdf

Section 6.13 of the document deals with visitability of housing and applies to the construction of affordable rental housing in buildings of 24 or more units that are funded by the City of Ottawa. Section 6.13.2 specifies design requirements for visitable housing and Section 6.13.3 identifies recommended visitability features.

All proponents are to refer to the on-line document for requirements associated with visitable housing.

To qualify for points in the evaluation, all provisions for visitable and wheelchair access must be clearly indicated in the design concept.

Appendix D – Agreements, Project Milestones & Payment Schedules

Funding Agreements

Following Provincial approvals for funding, Proponents will be required to enter into a Municipal Housing Project Facilities Agreement or Contribution Agreement with the City of Ottawa. Template agreements will be available from the Affordable Housing Unit. Capital funding awarded through this Action Ottawa RFP will be secured in the form of a mortgage on title. If there is a significant breach of the terms of the agreement, all financial assistance plus interest and costs must be repaid to the City, Province and Federal Government.

Project Milestones and Funding Schedule

The Municipal Housing Project Facilities Agreement and IAH Program Guidelines will establish development milestones and timeframes for disbursement of funds. The timeframes will be established in cooperation with the Proponent. If the successful Proponent fails to meet the agreed upon milestones established in the development schedule, the City reserves the right to withhold further advances, and to terminate agreements with the Proponent.

The following information is provided so that Proponents understand the cash-flow throughout the project. The City expects the Proponent to make every effort to arrange financing that allows them to manage the project cash flow within the constraints of the disbursement schedule.

Appendix E – Target Rents

Average Market Rent 2016

Table 2 below provides the most recently published CMHC Average Market Rents (AMR), and provides Below Market Rent levels at 70% and 80% AMR.

Table 2			
Average Market Rent (AMR) Information			
BASED ON FALL 2016 CMHC MARKET RENTAL REPORT			
		Below Market Rent (BMR)	
		70% of AMR	80% of AMR
Apartments	AMR		
Bachelor	\$812	\$568	\$650
One	\$982	\$687	\$786
Two	\$1,204	\$843	\$963
Three	\$1,417	\$999	1,134
Townhouses			
One	\$797	\$658	\$638
Two	\$1,196	\$837	\$957
Three	\$1,332	\$932	\$1,066
Four	\$1,410	\$987	\$1,128
Five	\$1,520	\$1,064	\$1,216

Appendix F – Mandatory Insurance Requirements

During the Construction of the Housing Project:

The Chargor shall take out and maintain throughout the term of the Charge the following insurance, all in a form and with insurers acceptable to the Chargees:

- (a) Builder's Risk Insurance (property insurance) for the full replacement value of the completed construction project, including a negotiated sub-limit for earthquake and flood.

The policy must include the following:

- (i) replacement cost value;
- (ii) stated amount co-insurance;
- (iii) waiver of subrogation; and
- (iv) loss payable in favour of Her Majesty the Queen in Right of Ontario as Represented by the Minister of Municipal Affairs and Housing and the City of Ottawa.

- (b) Boiler and Machinery Insurance (including pressure objects, machinery objects and service supply objects) on a comprehensive basis.

The policy must include the following:

- (i) repair and/or replacement value;
- (ii) stated amount co-insurance;
- (iii) waiver of subrogation; and
- (iv) loss payable in favour of Her Majesty the Queen in Right of Ontario as represented by the Minister of Municipal Affairs and Housing and the City of Ottawa.

- (c) Wrap Up Liability Insurance for Third Party Bodily Injury, Personal Injury and Property Damage to an inclusive limit not less than five million dollars (\$5,000,000.00) per occurrence and five million dollars (\$5,000,000.00) products and completed operations aggregate. The insurance shall be in the joint names of Her Majesty the Queen in Right of Ontario as Represented by the Minister of Municipal Affairs and Housing, the City of Ottawa and its agents and assigns, all other contractors, sub-contractors, suppliers and/or tradesmen while working on the site, and engineers, architects, consultants or other person which the City of Ottawa may require to be added as insured parties.

The policy must include the following:

- (i) premises and operations;

- (ii) owner's and contractor's protective liability;
 - (iii) broad form products and completed operations liability;
 - (iv) cross liability;
 - (v) blanket written and oral contractual liability;
 - (vi) all risks tenant's legal liability;
 - (vii) hoist liability;
 - (viii) fire fighting and forest fire fighting expense liability;
 - (ix) employer's liability and voluntary compensation;
 - (x) non-owned automobile liability;
 - (xi) directors, officers, employees, shareholders, legislators and officials involved in the project added as insureds and/or additional insureds;
 - (xii) shoring, blasting, excavating, under-pinning, demolition, pile driving and caisson work, work below and above ground surface, work below and above water, tunnelling and grading and similar operations associated with construction work, as applicable;
 - (xiii) sudden and accidental pollution liability with a discovery provision of not less than one hundred and twenty (120) hours and a subsequent reporting provision on not less than one hundred and twenty (120) hours; and
 - (xiv) thirty (30) day, written notice of cancellation.
- (d) Professional Errors and Omissions Liability Insurance, insuring liability for errors and omissions in the performance or failure to perform the services contemplated in the Provincial contribution agreement and the Service Manager Contribution Agreement, in the amount of not less than Two Million dollars (\$2,000,000.00) per claim and in the annual aggregate.
- (e) Automobile Insurance as per statutory requirements in Ontario, Ontario Automobile Policy (OAP 1) Owner's Policy Sections 3 and 4, auto liability for a limit of not less than Two Million Dollars (\$2,000,000.00) per occurrence, including Accident Benefits and where applicable, Section 7, Loss or Damage Coverage.
- (f) Proof of WSIB Coverage - If the contractor does not provide a policy endorsement for Employer's Liability and Voluntary Compensation, the contractor shall submit a valid Clearance Certificate of WSIB coverage to the Minister and to the City of Ottawa prior to the commencement date of the Provincial contribution agreement and the Service Manager contribution agreement. The contractor shall ensure that each subcontractor complies with the WSIB requirements set out in this paragraph.
- (g) Proof of Insurance - The contractor shall provide the Minister and the City of Ottawa with a valid Certificate of Insurance and a renewal replacement as may be necessary, confirming the insurance coverage requirements and stating any pertinent exclusions as applicable, contained by the policy (ies), prior to the commencement of the Provincial contribution agreement and the Service Manager contribution agreement and reverencing the respective agreements. The contractor

shall ensure that each subcontractor complies with the insurance requirements set out in the respective agreements by obtaining similar types of insurance and providing the contractor with valid Certificates of Insurance.

Insurance Required During Regular Operations

After construction has been completed, the Housing Provider shall provide and maintain during the term of this Agreement the following insurance coverage:

- (a) Commercial General Liability Insurance subject to limits of not less than \$5,000,000.00 for bodily injury, death and damage to property including loss of use thereof, which shall include insurance for the following:
 - (i) Premises and Operations Liability;
 - (ii) Products and Completed Operations Liability;
 - (iii) Personal Injury Liability;
 - (iv) Elevator Liability, if applicable;
 - (v) Contingent Employer's Liability;
 - (vi) Owner's and Contractor's Protective Liability;
 - (vii) Contractual Liability;
 - (viii) Severability of Interest Clause;
 - (ix) Liability with respect to non-owned licensed motor vehicles; and
 - (x) Cross Liability,

and the Commercial General Liability insurance shall be in the name of the Housing Provider and shall name the City of Ottawa as an additional insured thereunder;

- (b) Broad Form Property Insurance upon the lands, including building, building equipment and supplies utilized in the operation of the premises in an amount not less than the full replacement cost of the building and contents and including extra expense coverage. Such insurance shall be in the name of the Housing Provider and name the City of Ottawa as a loss payee as their interests may appear. Such insurance shall preclude subrogation claims by the Insurer against anyone insured thereunder;
- (c) Boiler and Machinery Insurance upon the lands, including building, building equipment and supplies utilized in the operation of the premises in an amount not less than the full replacement cost of the building and contents and including extra expense coverage. Such insurance shall be in the name of the Housing Provider and name the City of Ottawa as a loss payee as their interests may appear. Such insurance shall preclude subrogation claims by the Insurer against anyone insured thereunder; and

- (d) Motor Vehicle Liability Insurance in respect to owned or leased licensed Motor Vehicles subject to a limit of not less than \$2,000,000.00 inclusive per occurrence for bodily injury, death and damage to property including loss of use thereof.

All policies mentioned shall contain an endorsement to provide the City with (30) days prior written notice of cancellation or of a material change that would diminish coverage.

The Housing Provider shall furnish the City with copies of such policies or certificates of insurance as evidence of such insurance prior to execution of this Agreement and upon the anniversary date(s) of all applicable policies described herein.

The Housing Provider may be required by the City to provide and maintain additional insurance coverage related to this Agreement's requirements, under the following circumstances:

- (i) a change in the law; or
- (ii) an increase in the value of the Project,

such that it would lead a prudent owner in similar circumstances to provide and maintain such additional insurance coverage.

Any approval by the City of any of the Housing Provider's insurance policies shall not relieve the Housing Provider of any responsibility hereunder.

Appendix G – Energy Efficiency & Sustainable Design

Describe how the proposal will achieve the City's objectives:

1. To red reduce energy and water costs to make the units more affordable.
2. To reduce operating costs to the owner and tenants through the use of sustainable (green) building technology and energy and water conservation measures, if feasible.

The City is committed to working with the successful Proponent to ensure new affordable housing is as sustainable and energy efficient as possible, within the constraints of the funding available.

Clearly illustrate and explain how the proposal meets or addresses each of the following criteria:

1. ENERGYSTAR rated products/appliances;
2. Targeted new energy efficiency requirements to come into effect January 1, 2017 which require an energy savings of 13% higher than required in the 2012 Building Code;
3. Building design for buildings under Part 9 of the Building Code that must at minimum meet the performance of Energuide 80 or equivalent; and,
4. The goal of exceeding the MNECB.

Several energy efficiency measures are now required in projects funded under the New Rental Housing Component. Buildings must either meet or exceed the minimum energy efficiency requirements of the proposed 2012 Ontario Building Code and/or related amendments in the 2006 Ontario Building Code. These include:

The energy efficiency of building design for buildings under Part 3 of the Building Code must be higher than the reference building designed to the Model National Energy Code for Buildings (MNEBC), or 18% higher than the reference building designed to ASHRAE 90.1 – 1999 (without amendments).

Successful Proponents will be required to confirm that all submitted projects meet or exceed this requirement through the development and submission of a building energy model completed by qualified professionals and integrated into the project design with confirmation from the project architect or engineer.

Form A – Eligibility Checklist

Mandatory Requirement from Section 5.0 of the RFP	Meets Requirement	
	YES	NO
<p>5.1 Proponent is an incorporated private or non-profit organization</p> <ul style="list-style-type: none"> ▪ Proof of Incorporation, ▪ Annual Report for the two (2) most recent years available, and ▪ Audited Financial Statements. <p>Where there are no Audited Financial Statements, a letter from a financial institution or accountant is included.</p> <p>Where there is a partnership or other joint venture information about member organizations is included.</p> <p>Where there is a subsidiary corporation, information on both the parent and subsidiary corporations is included.</p>		
<p>5.2 Written confirmation of partnerships</p> <ul style="list-style-type: none"> ▪ Including board resolutions if applicable 		
<p>5.3 Project meets affordability requirements (weighted average of all rents is less than 80% of CMHC AMR)</p>		
<p>5.4 Confirmation of a pre-consultation with the Planning and Growth Management Department.</p> <ul style="list-style-type: none"> ▪ All required materials are included 		
<p>5.5 Confirmation of consultation with existing tenants</p> <ul style="list-style-type: none"> ▪ Meeting minutes and other forms of documentation are included 		
<p>5.6 Letter from Financial Institution or Lender</p>		
<p>5.7 Mandatory insurance requirements have been reviewed and included into budget</p>		
<p>5.8 Proponent is in good standing with the City of Ottawa</p>		
<p>5.9 Project meets required equity requirement</p>		
<p>5.10 Projects meets the Maximum Unit Size and Minimum Unit Count</p>		

5.11	IAH 2014 Program Requirements have been acknowledged <ul style="list-style-type: none">▪ Suite Meters Requirement▪ Apprenticeship Reporting▪ Compliance with Canadian Environmental Assessment Act 2012▪ Energy Efficiency Requirements		
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Form B – Proponent & Development Team Competencies

The Proponent: The Proponent is the lead organization who will own and operate the proposed building once completed.

Provide a description of your affordable or supportive housing proposal and describe how it supports your organizations mandate and vision.

Summarize your organizations structure, capacity and ability to manage and deliver the project in an efficient and accountable manner.

Does the Proponent organization have a procurement policy (y/n)?

If yes, submit the policy as an appendix to your submission.

If no, specifically detail the process that the organization will follow to undertake competitive procurement, which meets the three underlying principles for procurement, for all services. Identify who will be responsible for this process.

List staff member(s), employed by the Proponent, who will be part of the development team for the proposed project:

If no employee is proposed to be part of the development team, demonstrate how the Proponent will maintain oversight and manage the external project team, development and construction processes, and the proposed development.

Does your RFP submission include team members (development consultant and/or architect) (y/n)?

If yes, list the names and firms of all team members.

The Development Team: For each member of the team (staff and any procured consultants), demonstrate experience & expertise in each of the following:		
	Name, position & proposed role:	Experience/expertise:
Project Management		
Development of affordable housing projects		
Planning & Building processes		
Public Consultation		
Experience with competitive procurement processes**		
Rental or Supportive housing property management		
Working with community & public sector interests		
Successful Proponents, with or without development consultants and/or architects included in their submission, will be required to be “day 1 ready”. Show how the organization will be ready to do this.		

Note: Supportive housing proposals are to describe their ability to provide housing, supports & services to their target client group.

**To document experience with competitive procurement processes, describe concrete examples and indicate the process followed, what was procured and the value of the procurement

Form C – Examples of Similar Projects

Project 1	
Type of Affordable or Supportive Housing Project:	
Building typology (e.g. townhouse, low-rise apartment, high-rise apartment):	
Total Project GFA:	
Total number of units:	
Type of units (e.g. bachelor, 1-bedroom):	
Average unit size:	
Was the lead proponent in this RFP also the lead proponent of the project example?	
Is the lead proponent in this RFP currently managing/operating the project example?	
Management/operational structure:	
Total project cost:	
Total capital investment (including project funding and capital investment):	
Construction start date:	
Construction end date:	
Members of the Team who worked directly on the project	
Name:	Role & level of involvement:
Name:	Role & level of involvement:
Name:	Role & level of involvement:
Name:	Role & level of involvement:
References	
Name and title:	Phone:
Relationship to the applicant:	Email:
Relationship to the project:	

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Name:	Phone:
Relationship to the project:	Email:
Relationship to the project:	

Project 2	
Type of Affordable or Supportive Housing Project:	
Building typology (e.g. townhouse, low-rise apartment, high-rise apartment):	
Total Project GFA:	
Total number of units:	
Type of units (e.g. bachelor, 1-bedroom):	
Average unit size:	
Was the lead proponent in this RFP also the lead proponent of the project example?	
Is the lead proponent in this RFP currently managing/operating the project example?	
Management/operational structure:	
Total project cost:	
Total capital investment (including project funding and capital investment):	
Construction start date:	
Construction end date:	
Members of the Team who worked directly on the project	
Name:	Role & level of involvement:
Name:	Role & level of involvement:
Name:	Role & level of involvement:

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Name:	Role & level of involvement:
References	
Name:	Phone:
Relationship to the project:	Email:
Relationship to the project:	
Name:	Phone:
Relationship to the project:	Email:
Relationship to the project:	

References will be contacted to determine the proponent team's ability to deliver a project on time, on budget and to determine the organizations standards after taking over the building maintenance and operations.

Form D – Property Information

Municipal Address:
Legal Description:
Ward Number and Ward Councillor:
Current Zoning:
List all of the proposed uses for this site: (Use terms as per the Zoning By-law (these can be confirmed at the pre-consultation meeting with the Planning Department))
Are all of the proposed uses permitted under the Zoning By-law (y/n)?
Do you require any zoning amendments (y/n)? If yes, what is the proposed change in zoning:
Are any severances required (y/n)? If yes, identify the details of the required severance. Is the severance dependant on planning and/or technical approvals for an adjacent property (e.g. site plan, plan of subdivision, minor variance, replacement of services) (y/n): If yes, provide all details:
State any and all required variances:

Are there any mortgages on the property?

If yes, provide details (amount, interest rate, term, amortization):

State any known environmental, site servicing, contamination or geotechnical issues:

Note: If there are known issues that are not identified in the RFP submission and are revealed later, the City has the right to cancel any awarded funding.

Form E – Milestone Schedule

Milestone	A Confirmed – State Date Completed	B Estimated Date for Completion	C Not Started	D Not Applicable	E Comments/Issues
Official Plan Amendment					
Rezoning					
Minor Variance					
Severance					
Property Acquisition					
Competitive Procurement Process for Project Team member and consultants					
Development Application Review					
Heritage Approval					
Site Survey					
Site Plan Application					
Site Plan Agreement					
Conservation Authority Approval					
Building Permit Application, 1 st Permit					
Building Permit Application, Final Permit if phased project					
Occupancy Permit Issued					
Phase I ESA					
Phase II ESA					
Site Remediation or Site Specific Risk Assessment					
Record of Site Condition					
Geotechnical Report					
Traffic Study, Parking Study					
Stormwater Management Plan					
Wind Study					
Shadow Study					
Noise Study					
Tree Conservation Report					

Urban Design Review Panel					
Execution of Contribution Agreement					
Design Drawings – 33% complete					
Design Drawings – 66% complete					
Design Drawings – 99% complete					
Tendering / Competitive Procurement Process for construction					
Demolition Permit					
Construction Start					
Structural Framing 100% Complete					
Occupancy Permit received					

Form F – Organizational Structure & Property Management Plan

Describe Community Development Initiatives, including: tenant engagement, support services and/or security:
Describe how building and unit repairs, maintenance and management are undertaken:
Describe experience working with the CWL or clients requiring supports:
Describe experience with and processed for collecting and dealing with arrears, bad debt and vacancy loss:
Explain how the organization's financial systems and internal control processes that support effective management, transparency and accountability:
Explain the organization's budgeting, financial review and monitoring, and long-term planning processes:

Form G – Proponent Equity Contribution

Land – Indicate value at time of purchase and current value. As per section 5.8, a ratio of no more than \$20,000 per dwelling unit may be used.		
Cash		
Fundraising – distinguish between the amount targeted to be raised, the amount committed to date and the amount actually on hand	Targeted	
	Committed	
	On hand	
In kind contribution – detail nature of contribution and assign a cash value equivalent (see Section 5.8)		
HST Rebate		
Other – Please detail and assign a cash value equivalent		
Describe the Proponent’s available cash flow and financial ability to handle risk; identify any resources that may be available e.g. reserve funds, line of credit, operating balances.		