



City of Calgary's Rapid Housing Initiative 3 Intake Application

CH 3 (2022-11)

Important Notice: This PDF form is optimized for Adobe Reader. Please download the form to your desktop and use Adobe Reader to open, complete and submit the form.

City of Calgary's Rapid Housing Initiative 3 Intake and Application Process

Welcome to the Intake and Application Process for the third round of The City of Calgary's (The City's) allocation of Canada Mortgage and Housing Company (CMHC) Rapid Housing Initiative (RHI) funding. This process is required for The City to evaluate your proposed project against the RHI program parameters and City priorities to determine which projects will be funded through the Cities Stream and which projects will be supported through the Projects Stream.

On November 10, 2022, the Government of Canada announced the third round of the Rapid Housing Initiative (RHI) program, with an additional \$1.5 billion allocated over the next two years. Calgary has been allocated funding through the Cities Stream, which must be used to create a minimum number of new permanent affordable housing units. To achieve this goal, we are seeking to identify eligible non-profit housing providers and projects that meet the terms and criteria set out by [CMHC RHI website](#).

This is our formal call for information about projects that meet CMHC's eligibility requirements for RHI 3 and are requesting to be included in the City of Calgary RHI 3 Investment Plan, which will determine the allocation of Cities Stream funding as well as City support through both the Cities Stream and Projects Streams. Regardless of which stream is being used, all applicants will be asked to provide 20% of the project capital funding from other sources. This is new for RHI 3 and is being implemented to support The City meeting its minimum unit requirements in the Cities Stream and to ensure projects submitted under the Projects stream are competitive nationwide. The City will be aiming to support projects in both the Cities and Projects Streams, however the type and level of support will be at The City's discretion and is subject to Council approval.

In order for a project to be considered for inclusion in the City of Calgary RHI 3 Investment Plan, which is to be approved by City Council, please complete this form and submit all required additional documentation (Attachments 1 and 2) by **5pm January 6, 2023**. Please note that a separate form and documentation package is required for each project. Please review The City's Evaluation Process, including the public Terms of Reference, located on [The City's RHI webpage](#), prior to completing this form and preparing your application documents. Please also review CMHC's detailed criteria for both the Cities Stream and the Projects Stream before completing this form.

If you are interested in applying for City of Calgary RHI 3 funding, please download this form and send an e-mail to RHI@calgary.ca to receive a link to a secure folder where you will upload the form and the requisite additional documents into appropriate sub-folders.

Each project will be reviewed thoroughly and will undergo a City of Calgary due diligence review to ensure that organizations have appropriate governance and are in good financial standing, demonstrate a track record of experience, organizations and projects are in-line with City priorities and values, applicants demonstrate project readiness, and program parameters are being met. The due diligence review is a pass/fail process that is completed by an interdisciplinary panel of City of Calgary experts. Upon completion of this review, The City will then score and rank the passing projects based on CMHC and City of Calgary criteria and priorities to determine which projects will be included in the City of Calgary RHI 3 Investment Plan.

Final decisions on the successful applications pursuant to the City of Calgary RHI 3 Investment Plan shall be in the sole and exclusive discretion of The City and will be brought to City Council for final approval. Once again, please review The City's RHI webpage for an understanding of the criteria and priorities that will be used to help inform The City's final decisions on successful projects.



City of Calgary's Rapid Housing Initiative 3 Intake Application

CH 3 (2022-11)

If you have questions about this form, the additional documentation, or about your project(s) eligibility for RHI, please contact: RHI@calgary.ca. Members of our RHI team will contact you if they have any questions or require any clarifications on your form and/or documentation.

Confidentiality

For the purposes of this section, "Confidential Information" means information considered proprietary to an applicant and disclosed to The City pursuant to The City of Calgary RHI 3 Funding and the Intake Application, and includes all material, data and information (regardless of form and whether or not the same is protected by copyright, patent, or other applicable law) which is marked as "confidential" and is not available to the public. "Confidential Information" does not include any information that: (i) is now in or subsequently enters the public domain through means other than by disclosure by The City; (ii) is already in the possession of The City or is lawfully communicated to The City, free of any confidentiality obligation; (iii) The City has received the applicant's prior written approval to disclose; or (iv) The City is required to disclose pursuant to the *Municipal Government Act* (Alberta), the *Freedom of Information and Protection of Privacy Act* ("FOIP Act"), or any subsequent legislation of similar effect, or (v) The City is required to disclose pursuant to any law or order of a Court having jurisdiction over the matter.

Applications may include the Confidential Information of the applicants. Confidential Information may be used by The City for purposes in connection with The City of Calgary RHI 3 Funding and the Intake Application which may include sharing Confidential Information with the councillors, employees, agents, and professional advisers of The City. The City shall make all reasonable efforts to maintain in confidence the Confidential Information. Without limiting the generality of the foregoing, The City will make reasonable efforts to keep, file and store all Confidential Information, together with any notes or other material incorporating or relating to the Confidential information, in a manner consistent with the FOIP Act, as well as in a manner consistent with its confidential nature and to take all reasonable action, whether by instruction, agreement or otherwise, to ensure that its employees do not disclose or use the Confidential Information directly or indirectly, for any purpose other than the purposes for which it was provided. Notwithstanding the foregoing, The City may disclose the Confidential Information to any of the following: Government of Alberta, Government of Canada, CMHC, the affiliates, employees, agents, and professional advisers of the aforementioned entities, who require access to such information in connection with The City of Calgary RHI 3 Funding and the Intake Application.

Notwithstanding the foregoing, The City may be required to disclose Confidential Information pursuant to its disclosure obligations as contained in, and in accordance with, the FOIP Act, including requests to access information made pursuant to the FOIP Act. If you have any questions about the use of this information, please contact the Rapid Housing Initiative Coordinator at RHI@calgary.ca.



City of Calgary's Rapid Housing Initiative 3 Intake Application

CH 3 (2022-11)

Section 1: Identification

1. Name of organization

2. Name of representative for organization

First Name	Last Name
Title	

3. Contact details for representative

Email Address	Phone Number
---------------	--------------

4. Project name

5. Please identify whether you have a preference of which Stream of RHI 3 funding you would like to be considered for:

- Cities Stream only
- Projects Stream only
- Both the Cities and Projects Stream

Section 1.1: Project Address

6. Street number (if known)

7. Street name (if known)

8. Municipality

9. Postal code (if known)



Section 2: Project Introduction

10. Brief project description (Need, targeted population, program support, etc.)

[Empty text box for project description]

11. Type of housing form

Conversion to residential: RHI funding will support the acquisition of land and buildings for the purpose of conversion of non-residential to affordable housing.

Rehabilitation of abandoned/disrepair: Properties being acquired for the purpose of rehabilitating units that would otherwise be lost from the housing stock due to their state of disrepair must be vacant at the time of application in order to be considered for RHI funding. Renovictions and/or any other circumstance involving the eviction of existing tenants are not eligible under RHI.

Modular Housing units are defined as housing units which are partially or fully built off-site (for example: a factory, warehouse, or similar facility) by a qualified manufacturer and delivered to the site in whole or in parts and installed on an appropriately zoned and serviced lot. This may range from single, scattered units up to larger multi-unit housing projects. The modular housing units are expected to meet code compliance for permanent year-round occupancy of the authority having jurisdiction.

Traditional Construction refers to construction techniques (for example: wood-frame, steel frame, concrete, etc.) in which the work and construction activities are primarily performed on site.

- Conversion to residential
- Rehabilitation of abandoned/disrepair
- Modular Housing
- Traditional Construction

12. Estimated soft costs (\$)

\$ _____

13. Estimated hard costs (\$)

\$ _____



City of Calgary's Rapid Housing Initiative 3 Intake Application

CH 3 (2022-11)

14. Estimated land and acquisition costs (\$)

\$ _____

15. Contingency costs (\$)

\$ _____

16. Total estimated project costs (\$)

RHI funding cannot be used to cover operational expenses

\$ _____



Section 3: Minimum Requirements (Alignment with Program)

Questions in this section reflect mandatory minimum requirements for RHI funding.

Responses to these questions must be 'yes' in order for the project to be eligible

17. Affordability: Will the tenants occupying the units (1) spend less than 30% of their gross income on the applicable unit, and (2) be composed of individuals and families who are, or otherwise would be, in severe housing need, or people experiencing or at high risk of homelessness?

Severe Housing Need is a subset of core housing need where a household pays 50% or more of their before-tax income for their current dwelling. A household is said to be in core housing need if its housing falls below at least one of the adequacy, affordability, or suitability standards and it would have to spend 30% or more of its total before-tax income to pay the median rent of alternative local housing that is acceptable (meets all three housing standards).

Homelessness is described as the situation of an individual, family or community without stable, safe, permanent, appropriate housing, or the immediate prospect, means and ability of acquiring it.

Populations at imminent risk of homelessness are defined as individuals or families whose current housing situation will end in the near future (for example, within 2 months) and for whom no subsequent residence has been established.

- Yes
- No

18. Will your project meet the affordability definition, as outlined in the previous question, for a minimum of 20 years?

- Yes
- No

Based on CMHC's RHI criteria, projects will receive a higher score if they maintain affordability for longer than the minimum 20 year term. How long will your project meet the affordability definition?

19. Is the primary use of your project residential, and will 100% of the units provide permanent housing to tenants from the vulnerable population groups?

All units must be dedicated to people and populations who are vulnerable and targeted under the National Housing Strategy (NHS), who are in severe housing need and experiencing or at risk of homelessness.

Permanent housing is considered to be long-term tenancy of three months or more. Eligible property types include: standard rental, transition housing, permanent supportive housing, single room occupancy, and seniors housing (excludes delivery of healthcare).

- Yes
- No



City of Calgary's Rapid Housing Initiative 3 Intake Application

CH 3 (2022-11)

20. Will your project reach first occupancy within 18 months of the execution of the contribution agreement (e.g. upon receipt of funding)?

Yes

No



Section 4: Project Details

21. Primary vulnerable population targeted (if known):

Note: Tenants of the project must be comprised of individuals from the list of vulnerable target populations.

Only one population group can be identified as the primary target. Information on other population groups that are targeted can be provided during the next phase of information collection.

- Indigenous people
- LGBTQ2+
- People dealing with mental health or addiction issues
- People experiencing homelessness
- People with disabilities
- Racialized groups, including Black Canadians
- Recent immigrants, especially refugees
- Seniors
- Veterans
- Women and their children fleeing domestic violence
- Young adults

22. Estimated number of new affordable units/beds created:

For projects that assign individuals to specific beds, enter the number of beds serving a target group. Otherwise, enter the number of units. Every unit/bed must be associated with a vulnerable population group. A project must include at least five beds/units to be eligible for funding.

23. Indicate how the development of the units by the recipient is targeting, where possible, women and/or women and their children, Indigenous Peoples, and Black Canadians

24. Estimated date of acquisition / construction start date (if known)



City of Calgary's Rapid Housing Initiative 3 Intake Application

CH 3 (2022-11)

25. Estimated completion date / ready for occupancy (if known)

26. Will your project have secured operating budget/subsidy for the duration of the affordability period?

27. What proportion of funding will you and/or collaborators provide?

Please state the % of funding and the source, including the required 20% of capital support from other sources (i.e. non-RHI funds and non-City RHI support funds)

28. Additional comments or project details you would like share:



Attachment 1: Additional Required Documentation

In addition to filling out Sections 1 to 4 of the Intake Application Form, the documentation listed within Attachment 1 and Attachment 2 are required to be submitted for The City's evaluation of your organization and proposed project. The documentation includes both the RHI documents that CMHC requires for Projects Stream applications (Attachment 2), as well as additional documentation required by The City to assess your organization's and proposed project's fit with the RHI program and The City of Calgary priorities (listed below within this Attachment 1).

Please upload the documentation to the secure OneDrive file that is specific to your proposal (no other applicants will be able to view your documents). Subfolders will be provided within your secure project folder and titled in accordance with the headings from Attachment 1 and Attachment 2 (e.g., Board & Organization Governance Documents; Housing Operational Experience, etc.). It is imperative that you provide the required documentation within the appropriate subfolder.

1. Board & Organization Governance Documentation
 - Terms of Reference for the Board and Committees
 - Board Member Biographies
 - Suite of Board Policies
 - Board Recruitment policy or evidence of recent board recruitments
 - Hiring and Training Policies/Practices
 - Inclusion, Diversity, and Anti-Racism Policies/Practices
2. Strategic Plan and/or Annual Report
3. Financial Health
 - Audited financial statements for the last 4 years
 - If available, past 2 fiscal budgets including a variance analysis with explanations of budgets to actuals
 - List of assets owned at fair market value
 - Disclosure of any commitments or contingent liabilities
 - Applicant's bank or other financial institution(s)' letters of reference and credit check (as applicable)
 - Access to letters of credit or performance bonds
 - Credit rating reports/information
 - A signed letter from the Chief Financial Officer (or equivalent financial authority) of the Applicant setting out a description of:
 - any material off balance sheet financial arrangements currently in place;
 - any material events that may adversely affect the entity's financial standing since the last annual statement provided;
 - any financial controls in-place;
 - any bankruptcy, insolvency, company creditor arrangement or other insolvency litigation in the last three financial years; and
 - additional financial information, if any, that in the Chief Financial Officer's (or equivalent financial authority's) view will demonstrate to The City that the Applicant has sufficient financial standing and capacity to carry out their respective role(s) on the Project



City of Calgary's Rapid Housing Initiative 3 Intake Application

CH 3 (2022-11)

Attachment 2: CMHC's RHI 3 Documentation Requirements

NON-PROFIT APPLICANTS

All non-profits and organizations which are not wholly owned by another level of government are required to submit the following documents with their application:

CMHC Integrity Declaration

All applicants must provide a newly signed CMHC Integrity Declaration, even if one has been provided for another CMHC program or a previous round of RHI.

Housing Operational Experience

Applicants must demonstrate a minimum of five (5) years' experience operating housing projects of similar type, size, and with similar tenancy. CMHC reserves the right to determine if tenancy is considered similar.

Applicants must provide a list and summary of existing projects that form part of their current portfolio which includes number of units, location, type of tenancy, and years of operation.

Property Management Experience

Applicants must demonstrate a minimum of five (5) years property management experience, managing projects of similar size and scope in the same market.

Applicants must provide a list and summary of existing projects that form part of their current portfolio which includes number of units, location, type of tenancy, and number of years managing the property.

CMHC will allow applicants to enter into a formal property management contract with a professional third party to oversee the maintenance of the assets. The third party must be able to demonstrate the experience indicated above.

Non-profit applicants cannot select an intermediary.
Head leases are not permitted.

Construction and Development Experience

Applicants must identify their construction company, general contractor, modular company, and/or modular manufacturer, as applicable.

To demonstrate experience, applicants must provide a list and summary of previous projects completed by their designated contractor to confirm a minimum of five (5) years' demonstrated experience building projects of similar type, size, and in the same market. Please indicate when each project was started/completed and confirm whether they were completed on time and on budget.

If modular construction, the modular company/manufacturer must confirm the number of years in operation and whether they have the capacity to complete the project within the timelines proposed in the application. To demonstrate experience, include a list and summary of projects of similar size and scope in the subject market built in the last five (5) years, and confirm whether they encountered any delays/cost overruns and how those issues were managed/resolved.

Company Ownership

Applicants must provide all of the documents listed below, as applicable.

Articles of incorporation including all supporting documentation, such as, but not limited to business name registration, articles of organization, etc. Documentation must show that the non-profit has been registered and operational for a minimum of five (5) years to be eligible.

Letters patent, Bylaws, and any applicable shareholders' agreements.

Detailed information about the entity's ownership structure, which includes full organizational chart, names of all registered and beneficial owners and percentage of ownership (as applicable).

Financial Statements

Applicants must provide audited financial statements for the last four (4) years.

Identification of Operational, Programming and Other Support (Operating Subsidies)

Applicants must provide a summary description of the support offered to tenants and include confirmation of the project's long-term viability with appropriate subsidies as per item(s) listed below:

- Confirmation in writing from another level of government (Province/Territory/Municipality/ Indigenous government), that operating subsidies have been secured. This document must include duration of funding for a specific number of years, the types of operating support/ wrap-around services being provided and must identify any conditions to the funding. Approval of RHI funding is the only permitted condition.
- Applicants that have not provided confirmation that subsidies (for both operating and/or supports/wrap-around services, as applicable) are secured for a minimum of 15 years from another level of government, must confirm they are able to self-subsidize any deficiencies.

RHI Proforma

Applicants are required to submit an RHI Proforma indicating the proposed rents on a per unit basis. Proposed rents must meet RHI's affordability definition.

While all non-profits are required to submit the proposed rents, those who are self-subsidizing the viability of the project or where confirmed subsidies from another level of government for operating/programming/wrap around services are confirmed for less than 15 years must fully complete the RHI Proforma section(s) specific to the income, expenses (inclusive of vacancy), and resulting net operating income.

Applicants that are self-subsidizing or where subsidies are confirmed for less than 15 years, must demonstrate, through their financial statements, their ability to maintain the long-term viability of the project through their existing sources.

Please discuss with your Housing Solutions Specialist for further information and to obtain the RHI Proforma template.

Identification of Capital Funding

Applicants must provide details on the source of all capital contributions being made to the project, including in-kind contributions, grants, forgivable loans, and waiver of development charges and fees.

Identified sources must be supported by written confirmation of unconditional approval (approval of RHI funding is the only permitted condition). The confirmation may be a letter or the executed agreement from the grantor of the funding source or waiver. Applications identified to have funding gaps will be ineligible.

Repayable loans are not eligible sources of funding or contribution under RHI.

RHI Construction and Development Schedule

The CMHC RHI Construction and Development Schedule template must be completed.

Milestone dates and supporting comments entered must correspond with the level of readiness presented in your application and supporting documentation. Please ensure all required milestone dates have been entered in full.

This is your detailed plan describing how the project will be completed within the proposed timeline. Please note that failure to clearly demonstrate the start of the construction, required milestone dates, date of 25% occupancy, completion date, and date of the final occupancy permit may result in the application being declined or withdrawn.

Please note that dates provided in the schedule will be used to confirm the scoring of the application and will form part of the contractual obligations.

Confirmation that land is secured

If the land is already owned:

- The property identification number (PID)
- A recent property tax statement
- If recent purchase, provide copy of agreement of purchase and sale

If the acquisition of the land/building is an upcoming purchase:

- Copy of agreement of purchase and sale which includes purchase price, name of the buyer and seller, closing date, and relevant selling details and conditions (approval of RHI funding is the only permitted condition). Please ensure the closing date allows for enough time for an RHI Contribution Agreement to be executed. The closing date must not interfere with the ability to deliver units within the completion timeline. The agreement of purchase and sale must be effective and enforceable to be eligible for prioritization scoring.

If the acquisition of the land/building is a lease:

- Copy of the lease in draft or in final form (as applicable) must be included with the application. The lease must be effective and enforceable to be eligible for prioritization scoring.
- Land owned by a private entity and leased to an applicant applying to RHI is not eligible.
- Subleases are not eligible.

Leases must meet CMHC’s Leasehold Requirements. Please discuss with your CMHC Housing Solutions Specialist for more information.

If the acquisition of the land/building is a donation:

- Evidence of land donation must be either a letter confirming the donation is fully and unconditionally approved (approval of RHI funding is the only permitted condition) or an effective and enforceable agreement confirming the donation.

If the existing property is occupied, additional documentation may be required. Please discuss with your CMHC Housing Solutions Specialist for more information.

Registered Encumbrances or Agreements on Title

Applicants must provide copies of any registered encumbrances or agreements on title:

- Repayable loans or debts registered on the title are not eligible.
- Non-repayable or forgivable loans registered on title by a level of government may be acceptable at CMHC’s discretion.
- Non-financial instruments such as utility easements and rights of ways may be acceptable at CMHC’s discretion.

Approved Zoning

Applicants must provide confirmation that they have the appropriate zoning for the proposed project. Otherwise, provide confirmation from the municipality of the expected timelines for rezoning. Rezoning timelines must be considered in the RHI Construction and Development Schedule (dates/comments).

For projects on Indigenous lands, please provide:

- A land status confirmation issued by Indigenous Services Canada (ISC) or other land registry.
- A copy of the land lease agreement (if applicable).

Municipal Approvals

Copy of site plan (provided the milestone has been met in the RHI Construction and Development Schedule)

Copy of building permits (provided the milestone has been met in the RHI Construction and Development Schedule)

Where the site plan and building permits are not yet available, indicate which approvals remain and how this impacts completion. Timelines must be considered in the RHI Construction and Development Schedule (dates/comments).

Cost Estimates

Applicants must provide a Class B Cost Estimate or higher (Class A), prepared by an independent Professional Quantity Surveyor (PQS designation) which includes PQS review on the appropriateness of the contingency allowance (based on current market conditions).

The RHI Construction and Development Schedule must align with the class of the Cost Estimate. For example, a Class B Cost Estimate would indicate that the project is further away from shovel readiness than a Class A Cost Estimate.

Environmental Site Assessment / Hazardous Materials Study

Applicants must provide a recent Phase I Environmental Site Assessment (and Phase II/III as applicable) to support the level of project readiness indicated in the RHI Construction and Development Schedule.

Provide Record of Site Condition application, risk assessment, and confirmation of site remediation (as applicable).

Provide Hazardous Materials Studies for rehabilitations and conversions (as applicable).

Confirmation of Energy Efficiency

New construction projects only where prioritization scoring has been selected for exceeding the National Energy Building Code for Buildings as follows:

- 2017 National Energy Code for Buildings (NECB) for Part 3 buildings (applies to buildings larger than 600m² in total area or greater than 3 stories in height)
- or 2015 National Building Code (NBC) for Part 9 buildings (applies to buildings less than 600m² in total and 3 stories or less in height)

Traditional construction applicants must provide a modeling report of the energy consumption for the whole building and by major component end use (space heating, hot water, lighting, ventilation equipment, cooling systems, etc.) by a qualified professional that conducts energy modelling analyses (e.g. Professional Engineer, Certified Engineering Technologist, Certified Energy Manager and/or Registered Architect or Energy Advisor with Natural Resources Canada) using energy modelling software that has been independently verified to be compliant with ASHRAE Standard 140.

Modular construction applicants must provide confirmation from the modular manufacturer that if contracted to do so by the applicant, they will design, construct, and deliver the building at the committed level of energy efficiency.

Confirmation of Accessibility

New construction projects only where prioritization scoring has been selected for exceeding accessibility requirements.

Applicants must confirm the minimum building code requirement for the municipality or jurisdiction where the project is located. This can be achieved by providing written confirmation from the municipality directly, or by an accredited independent third-party professional (such as an architect or engineer).

Traditional construction applicants must provide detailed confirmation from an accredited independent third-party professional that their project will be constructed to meet the committed level of accessibility.

Modular construction applicants must provide detailed confirmation from the modular manufacturer that they will design and construct the building at the committed level of accessibility.

For the avoidance of doubt, professional reports are to be prepared:

- By independent, arms-length professionals holding a current, industry recognized designation in their field and be in good standing with their governing body, unless previously approved by CMHC;
- Not more than 12 months old (18 months for Environmental Site Assessment Report);
- Prepared for CMHC or accompanied by reliance/transmittal letter from the author acknowledging that CMHC will be relying on the report for funding purposes;
- Copy of professional liability (Errors and Omissions) insurance of dollar value as required by CMHC and with no conditions.

69687 20221021-005A



cmhc.ca/RapidHousing