

Appendix B – Submission Requirements

All applications for a PDF loan must include the following:

- a) The PDF Application Form attached as Appendix A:

The application form should be completed in as much detail as possible. Applicants are invited to attach additional information to the Application Form if further space is required but Manitoba Housing will not accept alternative budget formats as a replacement to the Application Form.

Please Note: Projects which do not target vulnerable clients, or that provide less than 20% affordable housing, will not be considered for this round.

- b) A preliminary project proposal:

The preliminary proposal shall provide a narrative overview of the proposed affordable housing project. This preliminary proposal must be completed to the best of the applicant's ability and should address the following areas in the same manner as they appear below:

Applicant Capacity

- A profile of the applicant organization including the origins and history as well as a brief description of the applicant's experience with developing, managing and, financing housing.
- The organization's mandate and its services provided to clients.
- Human resources (numbers and types).
- A copy of the organization's Articles of Incorporation, including any amendments and/or relevant corporate by-laws, and current list of Board of Directors.
- A list of all development team members and their respective roles in the project including any architectural firms or project development consultants that have been or will be engaged. Please include an explanation of how and why each team member was selected highlighting their experience relevant to supportive, transitional, or affordable housing.
- **Please Note:** If an organization or individual related to this application has delivered projects or services similar to the ones described in the application, Manitoba Housing will factor in previous performance into the evaluation of this measure.

Project Concept

An overview of the proposed project which includes:

- A narrative description of the overall project concept and development approach.
- Identification of the specific client group(s) to be served.
- Impact the units will have in the community based on the number of units, their size, client group(s) to be served, rent affordability, and services provided.
- Size, design and basic construction specifications for the entire project.
- Conceptual drawings (if available).
- Special design and amenity considerations.

- A description of any non-residential portions of the project, including the marketing plan for each use and a clear breakdown of the projected capital costs, operating costs, and revenues associated with such space on a prorated basis.
- Proposals must contain additional information if the project includes an assisted living or supportive housing component, or if it is based wholly, or in part, on a Life Lease model of development. The proposal must contain:
 - A clear breakdown of the proposed unit rents and service package fees
 - An itemized list of all services included as part of the service package
 - A description of how the services will be delivered and by whom
 - The amount of tenant equity for Life Lease developments

Project Delivery Plan

An overview including:

- Timeline (milestones and deliverables)
- Budget (if not included in Financial Data)
- Human Resources (who will be responsible for what)

Market Analysis

- A preliminary market analysis of the project's target market area. This should include a review of existing rental housing in the market area; vacancy rates in the target market area; identification of the target client group, including demographic, income and current housing information; a demographic analysis of the community; and identification of services and supports needed by the intended client group.
- Submissions must demonstrate affordability of the proposed rents for the intended client group.
- Submissions must demonstrate that a current and long-term need and demand exists for the proposed housing project

Site Details

A description of the proposed site for the project which includes attention to the following:

- Current ownership and use.
- Availability, acquisition technique and cost.
- Monetary value of the site (e.g., municipal assessment, market price).
- Current and required zoning.
- Consistency with any other community plans and/or municipal planning requirements.
- A description of services and local public amenities available to the site relevant to the intended client group, including preferably an area plan for context.
- Soil conditions and a statement on the results of any past environmental site assessment work.
- A description of whether or not there are any encumbrances registered on title restricting use of the site for residential purposes, or any other existing encumbrances and when and how they will be discharged.

In all cases, PDF monies over \$20,000 will not be advanced until the group provides a current and satisfactory Environmental Site Assessment.

Financial Data

- Describe cost assumptions used to complete the capital budget including the class of construction cost estimate used and the source of the construction cost estimate.
- Describe all proposed capital funding sources including equity contributions, grants, etc., and all related funding amounts. This list must include:
 - CMHC program(s) funding
 - Efficiency Manitoba – New Buildings program
 - An explanation of why these funding streams will not be accessed, if applicable.
- Describe the amount of mortgage financing required, the proposed amortization period, the interest rate, and the mortgage term.
- Describe contingencies and related amounts included in the capital and/or operating budgets.
- Describe cost assumptions used to complete the operating budget and an overview of projected operating revenue.
- If applicable, include a description of non-residential income.
- Describe how the project is financially viable and how long-term viability of the project can be protected.
- **Organizations proposing housing which includes the provision of care or support services must provide evidence of any necessary funding for the proposed care or support services. This must include the amount of funding required and source(s) of funding.**
- Provide details of any consideration given to enhancing the cost effectiveness of the project which may include:
 - identification of potential sources of revenue from other public/private capital grants or funding,
 - identification of alternate construction methods which may prove more cost effective from a capital or operating cost perspective.

Operations and Service Delivery Plan

An overview of how the project will be operated once tenanted:

- Brief description of the supportive and/or transitional housing support services that will be provided
- Letters of commitment from service providers to provide said services

Risk Management Plan

Applicants are asked to identify any known or potential risks to the proposed project and provide a strategy to mitigate such risks. Mitigation strategies will be considered as part of the evaluation committee's risk assessment for each of the following:

- Financial
- Organizational Capacity
- Delivery Complexity – Capital Delivery and Support Service Model
- Need and Demand
- Impact on Manitoba Housing Assets
- Environmental
- Site Control
- Community Opposition

Community Support

An overview of community support for the program:

- Proof of community support (e.g. list of volunteers, results of consultation with neighbours and residents who may be impacted by the project)
- Letters of support from municipality, local organizations, and private sector groups indicating the community's willingness to participate and share in the benefits and risks of the project