

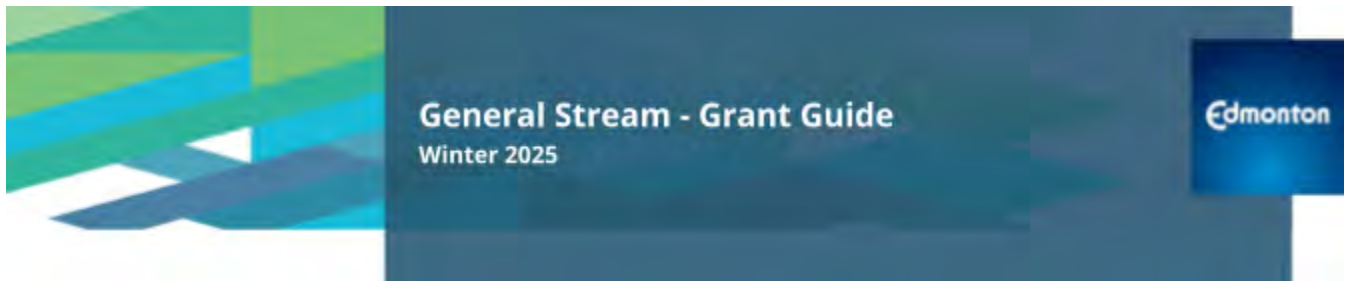
Affordable Housing  
Investment Program

Edmonton

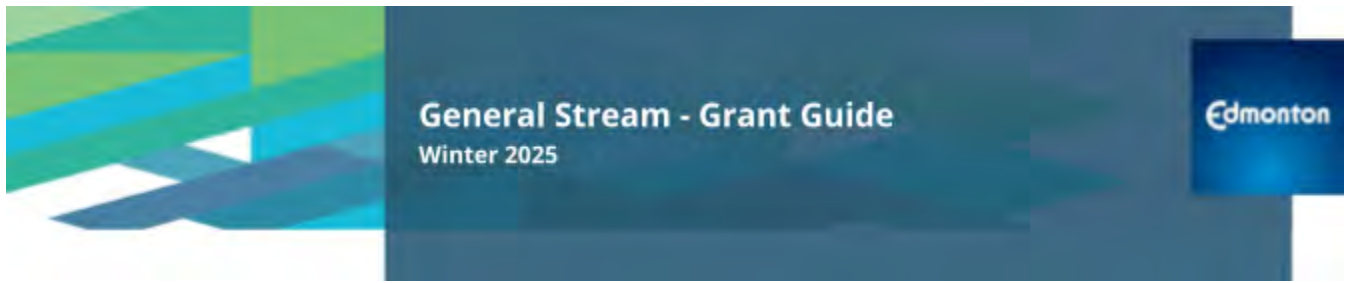
**General Stream  
Grant Guide**

Winter 2025

[ahipgrant@edmonton.ca](mailto:ahipgrant@edmonton.ca)  
[edmonton.ca/affordablehousinginvestment](https://edmonton.ca/affordablehousinginvestment)



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## Introduction

The City of Edmonton believes all residents deserve access to safe, adequate and affordable housing. Housing security is critical to a healthy city and fundamental to the physical, economic and social well-being of individuals and families, and maintaining diverse and inclusive communities.

In alignment with City Policy C601 (Affordable Housing Investment Guidelines), the City launched the Affordable Housing Investment Program (AHIP) in 2019 to support the creation of new or renovated affordable housing units across all areas of the City. To encourage affordable housing development in Edmonton, the Affordable Housing Investment Program provides grant funding in two streams, one of which is the General stream.

This document provides information on the General stream, how it works, and how to qualify.

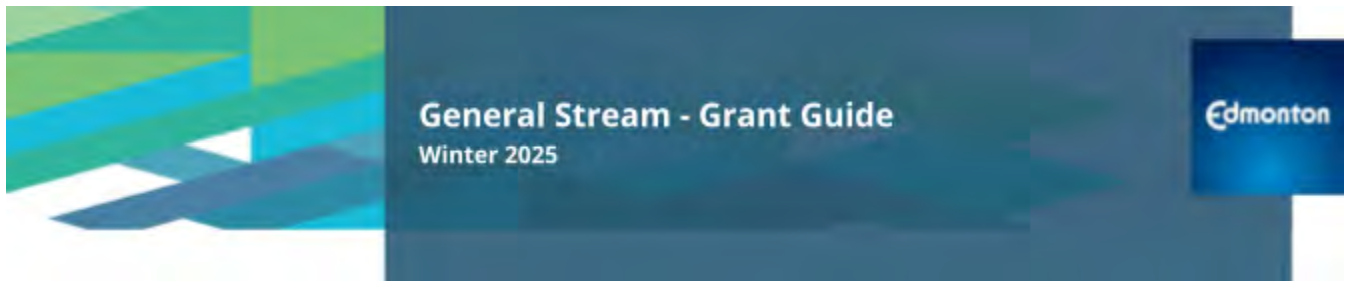
## Program Details

The General stream is intended to support organizations that are pursuing affordable housing within the City of Edmonton, through the provision of limited capital funding to assist organizations in constructing new affordable housing units or rehabilitating existing residential units.

**The grant funding model provides a maximum funding commitment by the City of up to 25% of the total capital costs associated with the affordable housing component of a development**, but the actual amount of funding commitment by the City may vary in the City's sole discretion.

Specifically, this grant has the following sub-streams:

- **New Construction - Planned Development** (shovel-ready developments where construction commencement has not occurred at the time of grant application, but will be ready to commence construction within two years of entering into a grant agreement with the City).
- **New Construction - Reimbursement** (developments where construction commencement has already occurred but an occupancy permit is not yet issued at the time of grant application).
- **Rehabilitation - Planned Development** (rehabilitation of existing housing units that are shovel-ready where construction commencement has not occurred at the time of grant application, but will be ready to commence construction within two years of entering into a grant agreement with the City).  
The development must either be:



- vacant, or
- if occupied, the Applicant must ensure that it has sufficient access to any units in the development as necessary to complete the proposed rehabilitation work.
- **Rehabilitation - Reimbursement** (rehabilitation of existing housing units that are shovel-ready where construction commencement has already occurred but an occupancy permit (or equivalent) is not yet issued at the time of grant application). The development must either be:
  - vacant, or
  - if occupied, the Applicant must ensure that it has sufficient access to any units in the development as necessary to complete the proposed rehabilitation work.

Proposed developments that may be considered for funding include but are not limited to:

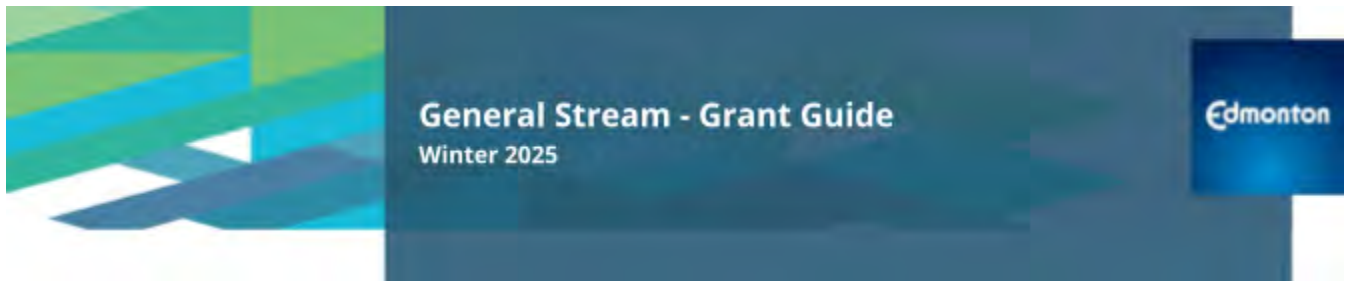
- Affordable near-market rental
- Affordable homeownership\*
- Mixed-income developments with an affordable housing component
- Mixed-use developments with an affordable housing component
- Permanent supportive housing developments
- Rent-geared-to-income/deep subsidy

\* If affordable homeownership is proposed, a detailed model outlining how ownership would be permitted while maintaining long-term affordability and the Applicant's involvement in the model, such as through a buy-back option or otherwise, is required as part of the application.

For the Rehabilitation sub-streams, in addition to the construction cost towards the rehabilitation of housing units for affordable use, other construction costs related to repairs to the development such as those listed below may be considered for funding:

- balcony railings and slabs
- exterior windows and doors
- fire safety systems
- building envelope
- structural systems
- sewage water systems
- heating, electrical and ventilation systems
- elevator and lift repairs
- roofing.

The amount of funding commitment by the City may vary in the City's sole discretion.



## Applicant Eligibility

The General stream is open to non-profit and for-profit entities that demonstrate:

- Commitment and competence to complete the proposed development
- Expertise and proven ability to undertake the proposed development
- Financial soundness, including:
  - Financial and operational ability to complete and maintain the development
  - Capacity to handle development risks (i.e. cost overruns, delays)
- Managerial competence and capabilities

To be considered for the Rehabilitation sub-stream, individual developments must result in enhancements to the building/complex that:

- Reduce associated operating costs,
- Extend the useful life of the building; and
- Improve the physical condition and/or functionality of the building.

## Mandatory Minimum Project Requirements

All proposed developments must meet the following mandatory minimum requirements to be eligible for application:

### Project Readiness

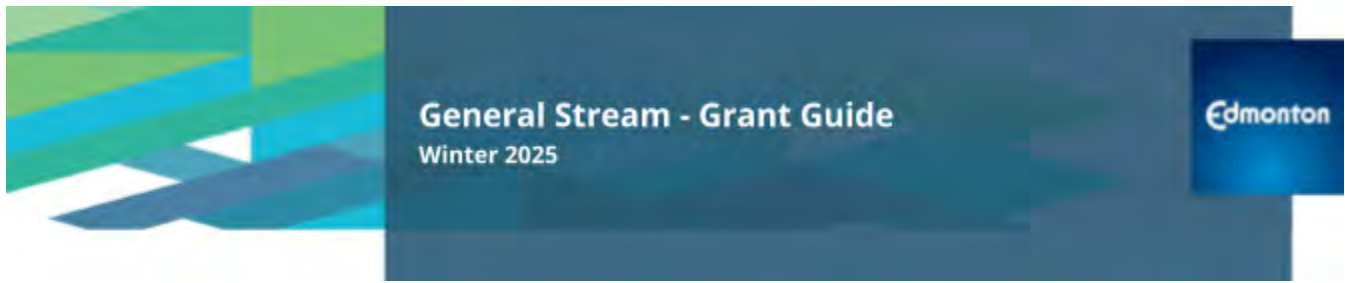
The **Planned Development** sub-stream is for proposed developments that are shovel-ready where construction commencement has not occurred at the time of grant application, but will be ready to commence construction within two years of entering into a grant agreement with the City.

The **Reimbursement** sub-stream is for proposed developments where construction commencement has already occurred but an occupancy permit (or equivalent, as the case may be) has not yet been issued at the time of grant application.

In all cases, the Applicant must ensure that any residential units proposed for affordable housing use are available for occupancy for said use as of the date of the issuance of the occupancy permit (or equivalent).

### Location and Size

- The proposed development must be located within the boundaries of the City of Edmonton.



- The proposed development must include a minimum of five housing units.
- The location must be currently zoned to permit the proposed development

### Affordability

- Must remain affordable for a minimum of 25 years from the date of the issuance of the last occupancy permit (or equivalent). Proposed developments with a longer affordability term will be ranked higher at the evaluation stage, to a maximum agreement term of 40 years.
- The minimum requirements relating to provision of affordable units to classes of occupants is identified in Appendix I, for both rental and homeownership developments.
- Additional eligibility or payment criteria for occupants may be proposed for consideration by, or imposed by, the City of Edmonton.

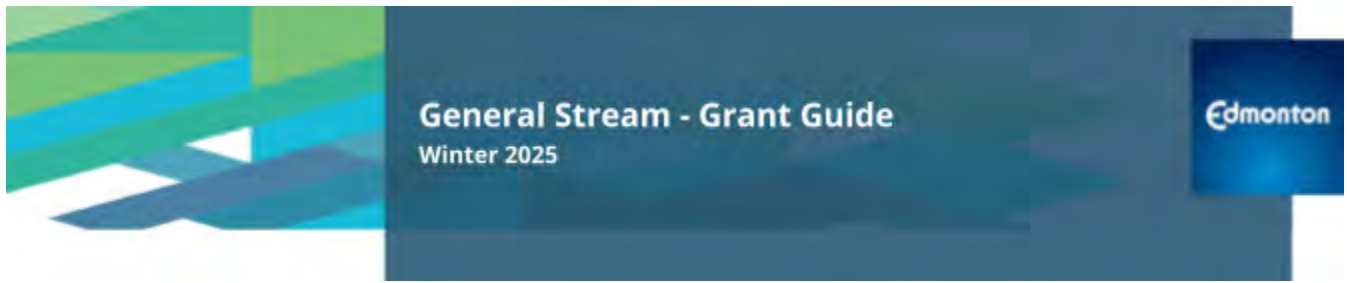
### Financial Viability

- Confirmation of fee simple ownership of the development lands by the Applicant (purchase contract or certificate of title).
- 10% of the total development cost must be provided by the Applicant as equity, except in special cases as determined by the City of Edmonton.
- Applicants must provide evidence of the financial viability of the proposed development.

\* If the Applicant does not have three years of financial history, as evidenced by Financial Statements or on the discretion of the City, the City may require a third party guarantor to provide financial backing through a Guarantee Agreement with the City.

### Energy Efficiency

- New developments comprising apartments and/or large buildings must achieve at least a 15% improvement over the baseline tier 1 of the 2020 National Energy Code for Buildings
- New developments comprising single-detached housing, semi-detached housing, and/or row housing using Section 9.36 of the National Building Code (Alberta Edition) must achieve energy performance equivalent to a 15% improvement over the baseline tier 1 of the 2020 National Energy Code for Buildings
  - Must also abide by requirements related to City Policy C627 (Climate Resilience), if and when applicable. These requirements apply to new construction projects that are greater than 600 metres in gross floor area, anticipated to be greater than \$3 million in total capital project costs, and where the requested funding from the City will be at least 33% of the total capital construction costs of the project (excluding land costs). Where so applicable, the projects must have the future installation of renewable energy systems considered in the design process.
- Rehabilitation developments must be designed to achieve a minimum 25% decrease in energy consumption and Greenhouse Gas (GHG) emissions relative to pre-rehabilitation ("base case") performance



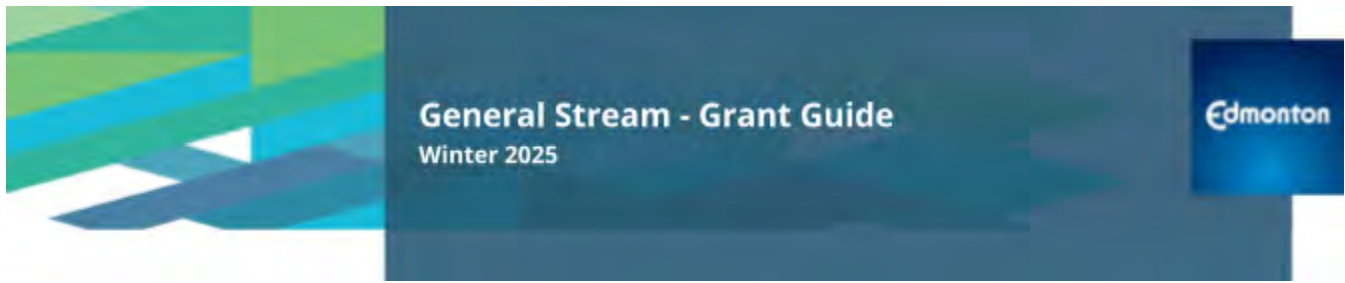
## Accessibility

- Applicants must meet minimum building code accessibility requirements; however, developments that meet higher accessibility standards, including, but not limited to, universal design, visitable units, units designed for persons in wheelchairs, and barrier-free bathrooms, will be scored higher during the evaluation process

## Application Schedule

Applications are accepted and reviewed based on the following annual schedule:

Application Intake Start	January 27, 2025
Application Submission Deadline	April 25, 2025
Application Processing/Evaluation	April - June 2025
Grant Recommendation Decision	June - July 2025
Grant Award Recommendation to City Council	August - September 2025
Affordable Housing Agreement Drafting	October 2025 - March 2026
Affordable Housing Agreement Execution	March - December 2026
Grant Disbursement	In accordance with Affordable Housing Agreement



## Application Process

### Process Chart - New Construction - Planned Development



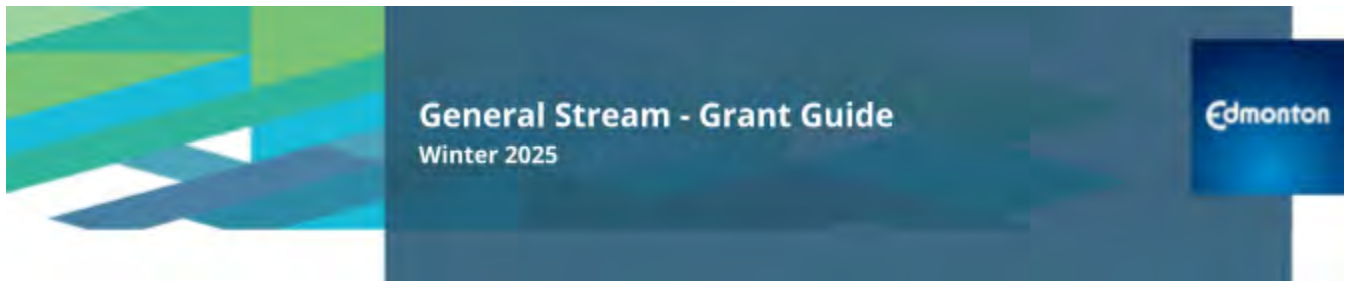
Process Chart  
General Stream (New Construction - Planned Development)  
Version: January 2025

### Process Chart - New Construction - Reimbursement

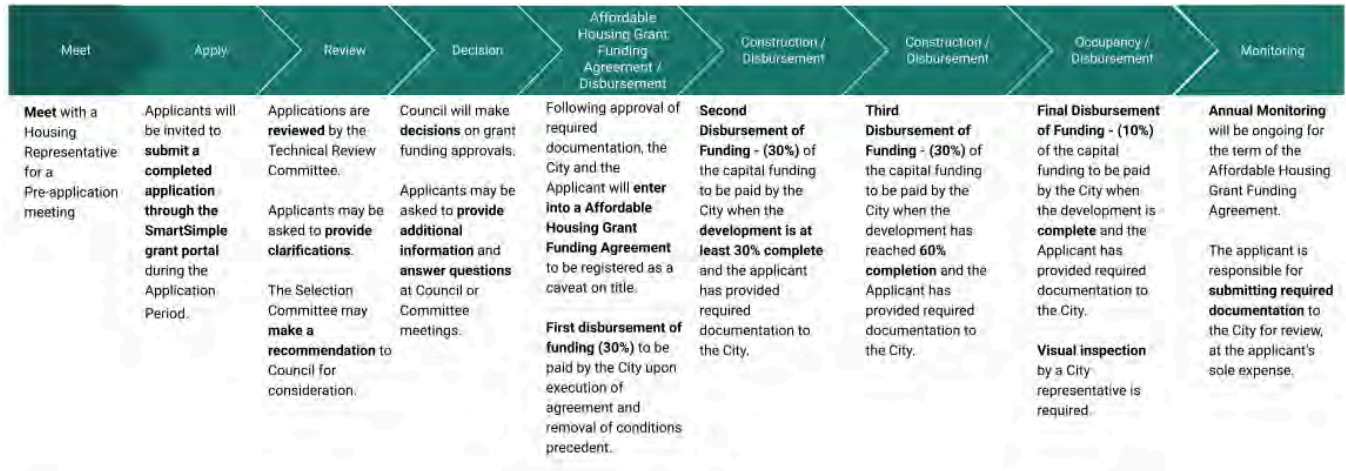


Process Chart  
General Stream (New Construction - Reimbursement)  
Version: January 2025





## Process Chart - Rehabilitation - Planned Development

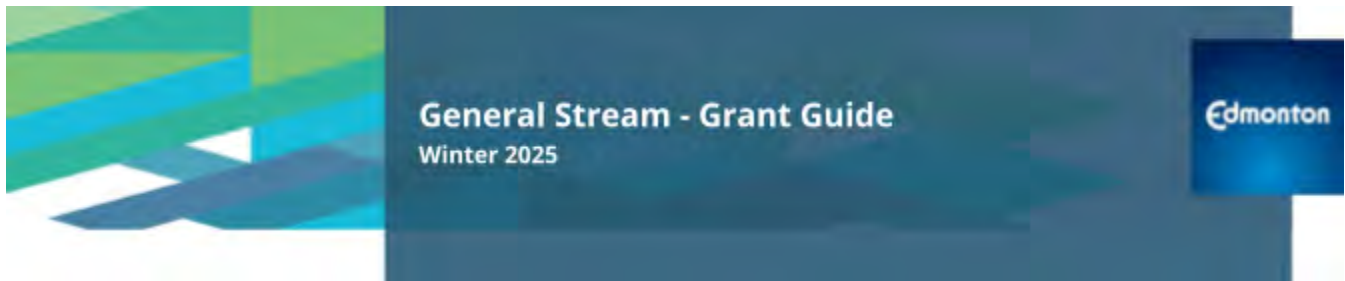


Process Chart  
General Stream (Rehabilitation - Planned Development)  
Version: January 2025

## Process Chart - Rehabilitation - Reimbursement



Process Chart  
General Stream (Rehabilitation - Reimbursement)  
Version: January 2025



**Step 1: Pre-application Meeting (with Housing Representative)**

All prospective Applicants must arrange for an initial pre-application meeting with a Housing Representative to review the suitability of a proposed development for application to the General stream. City Administration may reasonably request due diligence documentation from the prospective Applicant, to be provided at the prospective Applicant's sole expense.

*\*Before meeting with a Housing Representative, please review the required checklist (see appendices) outlining the minimum documentation required at each stage of the process in order to move forward.*

**Step 2: Apply for the Grant Program**

If Administration determines that a proposed development may proceed to a formal grant application, the prospective Applicant will be directed to the [SmartSimple grant portal](#) to begin the application process. A new account will be created in the portal if the Applicant has not already done so.

A separate grant application is required per development.

To ensure your application will be processed, please be prepared to submit the specific documentation listed in Appendix I and provide clarifications throughout the process. The inability to provide the required documentation will result in the withdrawal of your application.

*\*Note: the City of Edmonton may share your development details with other orders of government.*

**Step 3: Review**

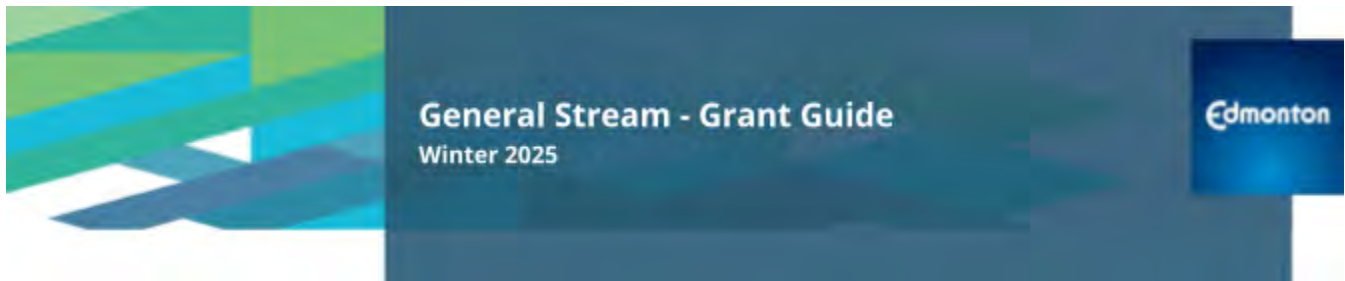
Completed applications received during an application period are reviewed by the Technical Review Committee against the objectives of the program, eligibility, minimum requirements, and evaluation criteria.

Next, the Selection Committee will prioritize applications received based on alignment with the City of Edmonton's priorities and outcomes as outlined in [City Policy C601](#) (Affordable Housing Investment Guidelines). The Selection Committee may make recommendations to the Edmonton City Council or its committees for consideration for receipt of grant funding.

**Step 4: Decision**

All awards are subject to the approval of Edmonton City Council or its committees. If your application is selected to proceed to Edmonton City Council or its committees for consideration, you must be prepared to attend that meeting and answer any questions as they may arise.

*\*Note: your development may be publicized in City of Edmonton materials, media and Council Reports.*



**Step 5: Affordable Housing Agreement**

The City will provide an affordable housing agreement to the Applicant to review.

The City and the Applicant must enter into an affordable housing agreement, with registration of the said Agreement as a caveat against the title to the development land standing in the name of the Applicant as the registered fee simple owner. The caveat remains registered on title for the term of the said Agreement.

**Step 5a: Guarantee Agreement (if required)**

If the City determines that a third-party guarantor is required to support the application, the City will provide a guarantee agreement to the Applicant to review.

The City and the Applicant must enter into the guarantee agreement at the same time as the affordable housing agreement, however no caveat registration is required for the guarantee agreement.

**Step 6: Disbursement of Grant Funding**

As noted in the Process Charts, disbursement of Grant Funding will differ between the *Planned Development* and *Reimbursement* sub-streams for *New Construction* and *Rehabilitation* projects. The typical documentation requirements and disbursement schedules are as generally and non-exhaustively shown in [Appendix II](#).

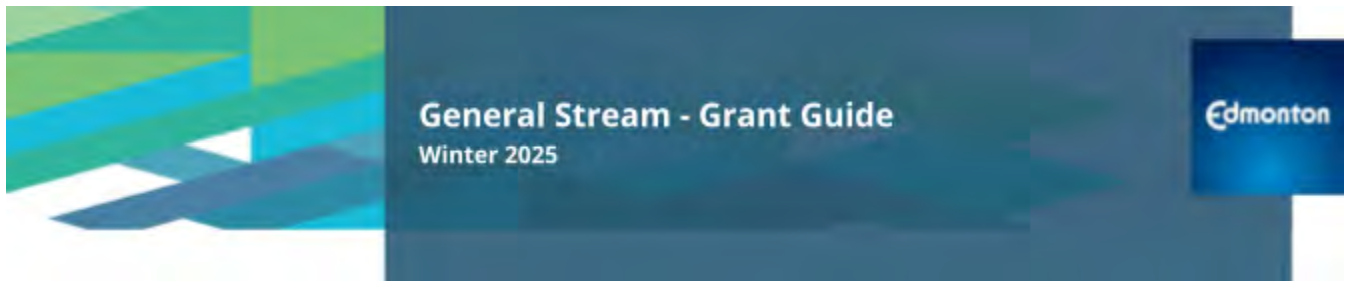
**Step 7: Monitoring**

Annual monitoring will be ongoing for the term of the affordable housing agreement at the sole cost and expense of the Applicant. Annual monitoring requirements may include, but are not limited to, reporting on occupancy of affordable units, annual statements of operations for the development, and annual financial statements. Additional reporting requirements may apply for developments operated under the *Continuing Care Act*, if applicable.

## Disclaimers

Please note, at minimum and without limitation, the City reserves the right to withhold payment of grant funding where:

- The Applicant has made any material misrepresentation or provides any materially false or materially misleading information to the City;
- The Applicant or any associate or affiliate entity of the Applicant is in arrears on any payment or reporting obligation to the City under the terms of any other agreement made with the City;
- The Applicant has outstanding amounts owing to the City due to property taxes that are past due or in arrears;
- The Applicant is in litigation with the City over any matter;



- The Applicant is or becomes bankrupt, insolvent, commits an act of bankruptcy, makes a general assignment for the benefit of creditors, has a receiver or trustee appointed, or ceases to function as an active legal entity under the laws of Alberta;
- The Applicant is or becomes the subject of a Canada Revenue Agency judgment or tax lien; or
- There is a judgment, tax lien, builders' lien, or certificate of lis pendens registered against the title to the land on which the proposed development will be situated.

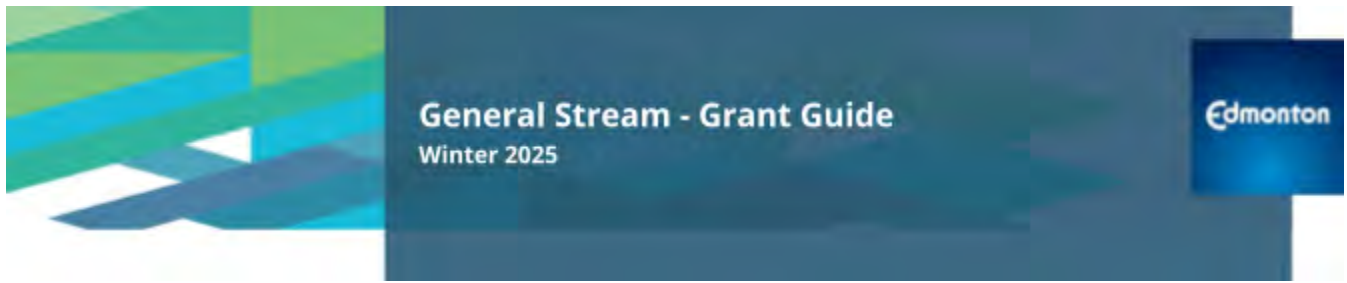
## Reservation of Rights

The City reserves the right, in its sole discretion, to:

- Require prospective and actual Applicants to provide further clarification on information submitted, or to provide additional information or materials to assist in a review of its submission;
- Accept, reject, or further negotiate with any or all prospective and actual Applicants;
- Amend, modify, cancel, or suspend the General stream, at any time, for any reason;
- Recommence the grant process for the General stream for new responses or enter into negotiations for grant funding;
- Extend from time to time any date, time period, or deadline provided for in the selection process in the General stream, upon written notice to all affected Applicants; and
- Not enter into a grant funding affordable housing agreement with any Applicant in the General stream.

## No Liability

By participating in any aspect of the General stream, all prospective and actual Applicants specifically agree that they will have absolutely no claim against the City or any of its employees, advisors, or representatives for anything resulting from the exercise of any or all of the rights set out herein. Without limiting the generality of the foregoing, all prospective and actual Applicants also agree that in no event will the City, or any of its employees, agents, advisors, or representatives be liable, under any circumstances, for any claim, or to reimburse or compensate the prospective or actual Applicant in any manner whatsoever, including, without limitation, for the costs of preparation of any submission, loss of anticipated profits, loss of opportunity, or any other matter. Any pre-application meetings and any submission process is only intended to solicit interest and information and does not create any legally binding arrangement with the City. The pre-application meeting and submission process will not give rise to any "Contract A" based tendering law duties or any other legal or equitable obligations arising out of any process contract or collateral contract. Neither a prospective or actual Applicant, nor the City, has or will have the right to make a claim of any kind, whatsoever, against the other or others, with respect to the award of a contract, the failure to award a contract, or the failure to honour a response to the submission process.



## Contact Us

If you have any questions about the Affordable Housing Investment Program, are interested in applying or would like to book a pre-application meeting, please send your inquiry to [ahipgrant@edmonton.ca](mailto:ahipgrant@edmonton.ca) or call 780-442-5045. We will be in touch with you within three business days.

## Resources

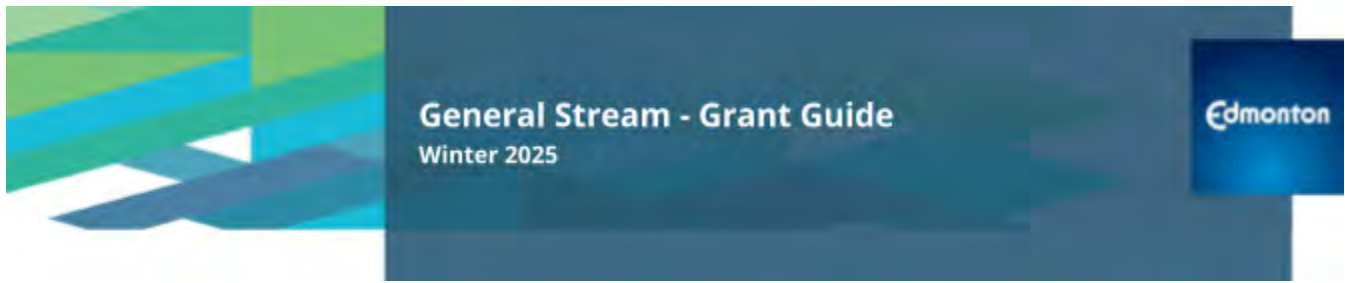
- [Affordable Housing Investment Grant Evaluation Criteria](#)
- [City of Edmonton Maximum Allowable Rental Rates \(MARR\) & Maximum Average Income Thresholds](#)
- [City of Edmonton: SLIM Maps](#) - for zoning information

Housing information and data:

- [Affordable Housing Guidebook](#)
- [City of Edmonton Affordable Housing Strategy A Home for Everyone \(2023 - 2026\)](#)
- [Edmonton Affordable Housing Needs Assessment \(August 2023\)](#)
- [City of Edmonton Homelessness and Housing Services Plan \(July 2024\)](#)

Relevant City Initiatives, Guidelines, Policies

- [City Initiatives](#)
- [Policy C601 Affordable Housing Investments Guidelines](#)
- [CONNECTEDMONTON](#)
- [The City Plan](#)
- [Indigenous Framework](#)
- [Urban Design Guiding Principles](#)
- [City of Edmonton Access Design Guide](#)
- [Environmental Site Assessment Guidebook](#)



# **Appendix I: Application Requirements**

## **Pre-Application Requirements**

Prior to being permitted to submit a grant application, Applicants shall meet with Administration to review the suitability of a proposed development for the grant program. The City may reasonably request due diligence documentation from the Applicant about the proposed development, at the Applicant’s sole expense.

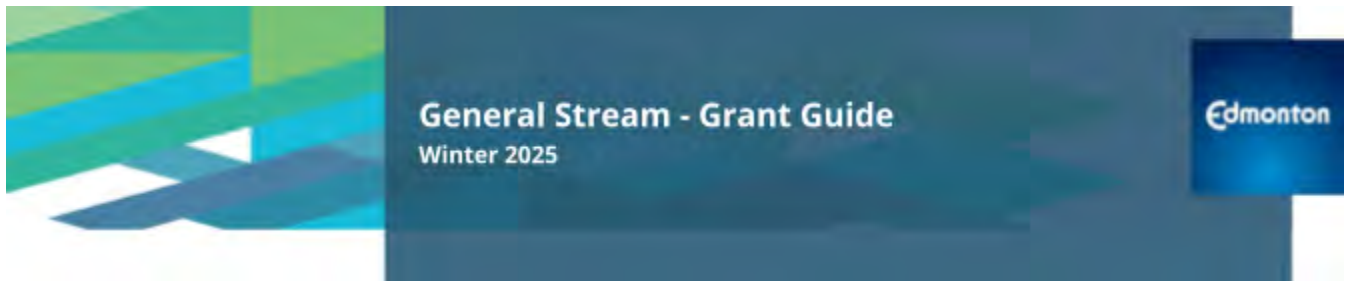
## **Application Document Requirements**

**All applications are to be submitted through the City’s [SmartSimple grant portal](#). Any applications not submitted through SmartSimple will not be considered for funding.**

The following required documentation and questions are to be responded to in SmartSimple and are listed here for reference.

### Applicant Information

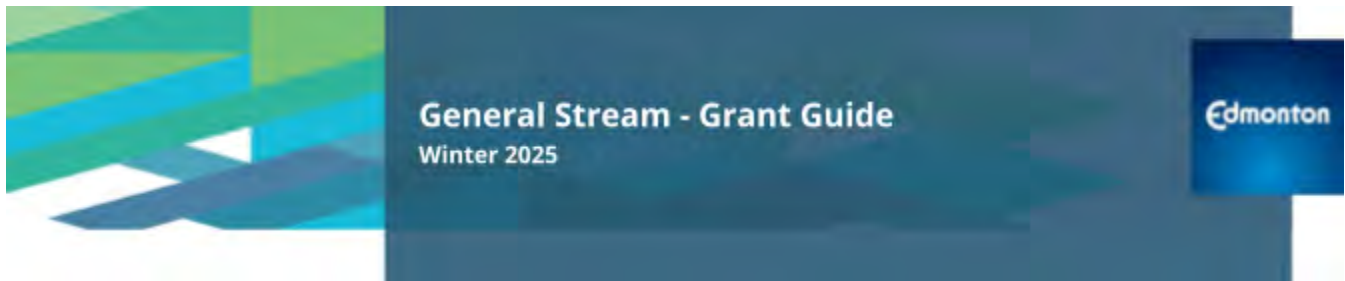
1. **[Statutory Declaration](#)** (amended as necessary if not commissioned in Alberta)
2. **Applicant’s incorporation or constating documentation:**
  - a. Guarantor’s incorporation or constating documentation (if applicable)
3. **Searches:** Current copies of the following searches:
  - a. Corporate Registry Search on Applicant
    - i. Corporate Registry Search on Guarantor (if applicable)
  - b. Personal Property Registry Search on Applicant
    - i. Personal Property Registry Search on Guarantor (if applicable)
  - c. Bankruptcy Search on Applicant
    - i. Bankruptcy Search on Guarantor (if applicable)
4. **No criminal convictions:** A letter stating that neither the Applicant nor any of its board members have ever been convicted of a criminal offence for fraud, theft, or money laundering
5. **Applicant competency:** A summary outlining the Applicant’s ability to carry out the proposed development



- a. Applicant's mission and history
- b. A description that outlines the experience of the Applicant, and any entity to be retained by the Applicant for the proposed development, in the operation and property management of affordable housing developments, including:
  - i. Number of years of management experience
  - ii. Existing properties owned and managed by the Applicant, including:
    - 1. Name of the property
    - 2. Property address
    - 3. Type of property (e.g. row house, low rise apartments)
    - 4. Number of units
    - 5. Programs and support services provided (e.g. off-site support services, on-site support services)
- c. Written confirmation as to whether the Applicant is constructing the development itself, or alternatively, the name of the contracted builder or developer involved in the construction of this development
  - i. Corporate Registry Search on contracted builder, if applicable
- d. Experience of the Applicant, and/or their contracted builder or developer in construction, including a list of developments completed or that are in progress, of similar size and scope as the proposed development, with the following details:
  - i. Name of the property
  - ii. Property address
  - iii. Type of property (e.g. single detached, row house, low rise apartments)
  - iv. Number of units
  - v. Overall budget for the proposed development
  - vi. Year complete
- e. Written confirmation as to whether the Applicant or its project team, consulting firm, or sub-consultant are licensed or eligible for licensing in Alberta with the Alberta Association of Architects (AAA). If applicable, please provide a list of developments recognized by awards

## Land Information

- 6. Land Title:** showing current ownership and all encumbrances registered on proposed development lands. Note that the Applicant must have fee simple ownership of the proposed development lands.
  - a. Purchase contract confirming the Applicant's right to fee simple ownership of the proposed development land showing purchase price and closing date, if the land is not currently owned by the Applicant

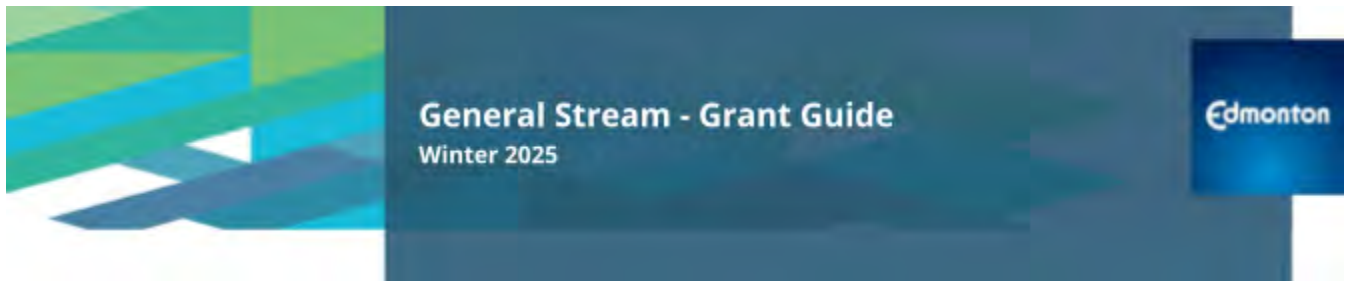


7. **Site Address and Zoning:** Confirmation of site address and current Zoning (this information may be obtained from [maps.edmonton.ca](https://maps.edmonton.ca))
  - a. Current zoning must support proposed housing development
8. **Permits:**
  - a. Development Permit if available (required for Reimbursement sub-streams)
  - b. Building Permit, if available (required for Reimbursement sub-streams)
9. **Phase 1 Environmental Site Assessment(s).** Further Environmental Site Assessments or environmental reporting may be requested by the City, in its sole discretion, in the event of potential or known contamination.
10. **Proximity to amenities / services, outlining distances to the following:**
  - a. Bus Stop
  - b. LRT Station or Major Transit Centre
  - c. Grocery Store
  - d. Park / Green Space
  - e. Recreation / Community Centre
  - f. Health Services
  - g. Public School
  - h. Child Care Services
  - i. Other

## Proposed Development Information

11. **Description of the proposed development,** including a description of the affordable housing component and any market housing or commercial component
  - a. Affordable housing agreement term: Number of years that the development will remain affordable
  - b. Rental rates: State the proposed rental rates  
For affordable rental developments, at minimum, 30% of total residential units must have rent payments that do not exceed 80% of average market rental rates as determined by the City, which utilizes CMHC average rental rates where available, OR have rent-geared-to-income with rent payments that do not exceed 30% of the occupant's gross household income (refer to the resources section on page 10 for the current year's [City of Edmonton Maximum Allowable Rental Rates \(MARR\) & Maximum Average Income Thresholds](#))
  - c. Homeownership rates: For affordable homeownership developments
    - i. Confirm that the Applicant organization has a mandate to provide affordable homeownership
    - ii. State the percentage of total residential units that will be affordable homeownership (minimum of 30%)





- iii. Describe the model outlining how ownership would be permitted while maintaining long-term affordability and the Applicant's involvement in the model, such as through a buy-back option or otherwise
- iv. State the proposed principal, interest, tax payments, homeowner association fees, condominium fees, and property insurance premiums, which must not exceed 30% of target residents' gross household income

**12. Demonstrated need and demand for type of housing:** description, which may include but is not limited to:

- a. Market study demonstrating the same housing type need
- b. Waiting list for same type of housing
- c. Vacancy information (i.e. low vacancy rates for affordable housing in the neighbourhood)

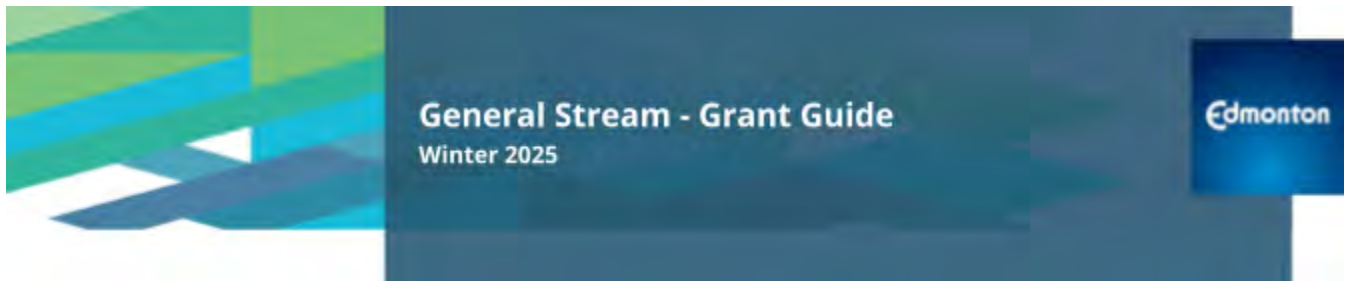
**13. Target market** (description):

- a. The demographic being served (e.g. individuals and/or families at risk of homelessness). Please specify the number of units dedicated to vulnerable populations and people experiencing chronic homelessness.
- b. Description of occupant selection and eligibility criteria
  - i. self-referred, coordinated intake, Applicant organization's waiting list, or referred by others
  - ii. criteria for tenants to enter or stay in the type of housing provided, including an explanation of how ongoing tenant eligibility will be monitored.

A mandatory requirement is that the annual household income of occupants must be below the income threshold limits set out by the City of Edmonton (refer to the resources section on page 10 for the current year's [City of Edmonton Maximum Allowable Rental Rates \(MARR\) & Maximum Average Income Thresholds](#))

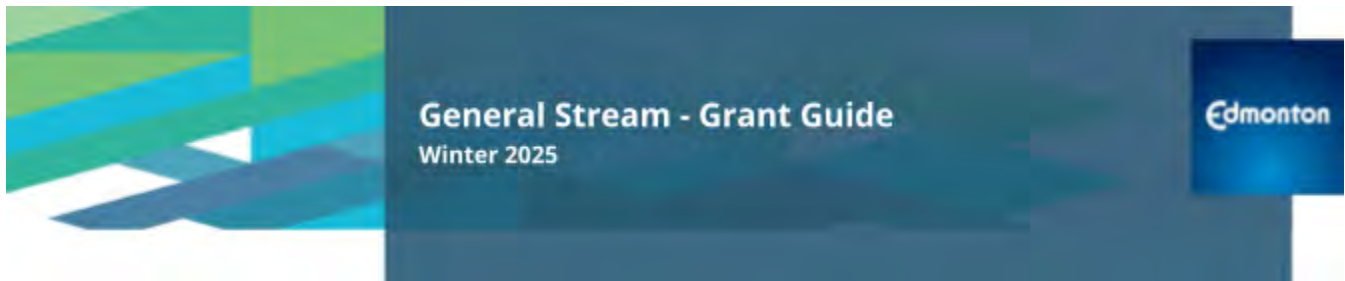
**14. Programs and services provided** (description):

- a. property management: on-site or scheduled visits (if scheduled visits, indicate frequency of service, e.g. daily, weekly, on-call)
- b. on-site / mobile support; full-time or part-time programming
- c. service provision (i.e. specific utilities, parking, laundry, meals, medical services, social services), indicating whether the cost of services are included in rent / mortgage payments
- d. description of ongoing collaboration with homeless-serving or other social service agencies, if any
  - i. where collaboration is sought, a signed Memorandum of Understanding between the applicant and the homeless-serving or other social service agency will be a condition of an affordable housing agreement



## Proposed Development Details

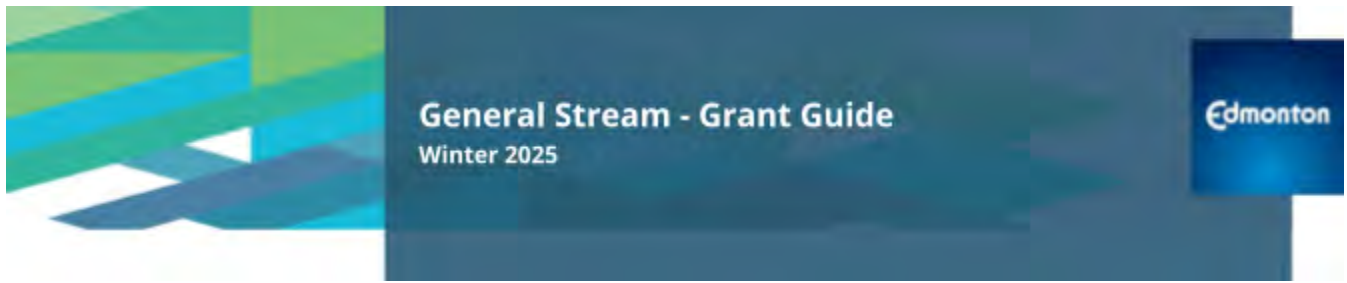
- 15. Number of units**, including breakdown of units per number of bedrooms and bathrooms
  - a. Include breakdown of the number of affordable units, if less than 100% of units in the development are affordable (i.e. mixed-market)
  
- 16. Amenities for residents** (description)
  
- 17. Gross Floor Area:**
  - a. Gross Floor Area in square metres of the development as a whole
  - b. Gross Floor Area in square metres of the affordable unit total only (if less than 100% of units in the development are affordable)
  
- 18. Set of drawings** (please contact the [Client Liaison Unit](#) for more details) including:
  - a. Site Plan
  - b. Landscape Plans, if available
  - c. Floor Plans
  - d. Elevation Drawings
  
- 19. Community Improvements & Policy Alignment**
  - a. Description of:
    - i. Community value adds, such as public art, preservation of historic resources, streetscape improvements, child care services, improvement to community facilities
    - ii. Alignment with City Plans, Policies and [Initiatives](#), such as the [Indigenous Framework](#), [Policy C601 Affordable Housing Investments Guidelines](#), [Policy C627 Climate Resilience Policy and Procedure \(Climate Resilient City-Funded, Non-City Owned Buildings\)](#), as applicable, [CONNECTEDMONTON](#), [The City Plan](#), and [Urban Design Guiding Principles](#)
  
- 20. Environmental/Energy Efficiency Features** achieved by the development (description):
  - a. *New Developments*
    - i. New developments comprising apartments and/or large buildings must achieve at least a 15% improvement over the baseline tier 1 of the 2020 National Energy Code for Buildings. Developments that achieve greater decreases will score higher during the evaluation process. Submit energy modeling, if available. *Energy modeling will be required prior to execution of the affordable housing agreement.*
    - ii. Developments comprising single-detached housing, semi-detached housing, and/or row housing using Section 9.36 of the National Building Code (Alberta Edition) must achieve energy performance equivalent to a minimum 15% improvement over the baseline tier 1 of the 2020 National Energy Code for Buildings



- iii. Must also abide by requirements related to City Policy C627 (Climate Resilience), if and when applicable. These requirements apply to new construction projects that are greater than 600 metres in gross floor area, anticipated to be greater than \$3 million in total capital project costs, and where the requested funding from the City will be at least 33% of the total capital construction costs of the project (excluding land costs). Where so applicable, the projects must have the future installation of renewable energy systems considered in the design process.

**b. Rehabilitation Developments**

- i. Confirm that the rehabilitated development will achieve a minimum of 25% energy consumption and greenhouse gas (GHG) emission reductions relative to the base case building. Developments that achieve greater decreases will score higher during the evaluation process. Submit energy modeling, if available. *Energy modeling will be required prior to execution of the affordable housing agreement.*
- ii. Analysis of the energy consumption and greenhouse gas emission performance of the base case building and the rehabilitated development must demonstrate how the physical and operational characteristics of the base case building and those of the proposed rehabilitated development will achieve a minimum of 25% energy and GHG emission reductions.
- iii. The energy and GHG emission analysis must be undertaken by a qualified professional.
  - 1. For multi-unit residential buildings falling under Part 3 of the National Building Code 2023 Alberta Edition, the analysis may be undertaken by a qualified professional such as a Professional Engineer, Architect, Certified Engineering Technologist (CET) or Certified Energy Manager (CEM)
  - 2. For multi-unit residential buildings with less than four storeys that fall under Part 9 of the National Building Code, a Residential Energy Advisor accredited by Natural Resources Canada, or equivalent, may undertake the analysis
- iv. Required documentation to demonstrate compliance includes:
  - 1. A brief Executive Summary of the comparison of annual total energy consumption and GHG emission reduction performance between the base case building and the proposed rehabilitated development
  - 2. A summary of the energy modeling of the proposed rehabilitated development that indicates annual energy consumption and GHG emissions for the total building and a breakdown of the estimates for each major energy end-use (e.g. space conditioning, hot water, lighting, equipment, appliances)
  - 3. An overview of the key physical and operational features of the base case building and proposed rehabilitated development that illustrates the improvements to be made to the building envelope, space conditioning, hot water, lighting and other systems, energy recovery and renewable energy systems to achieve compliance



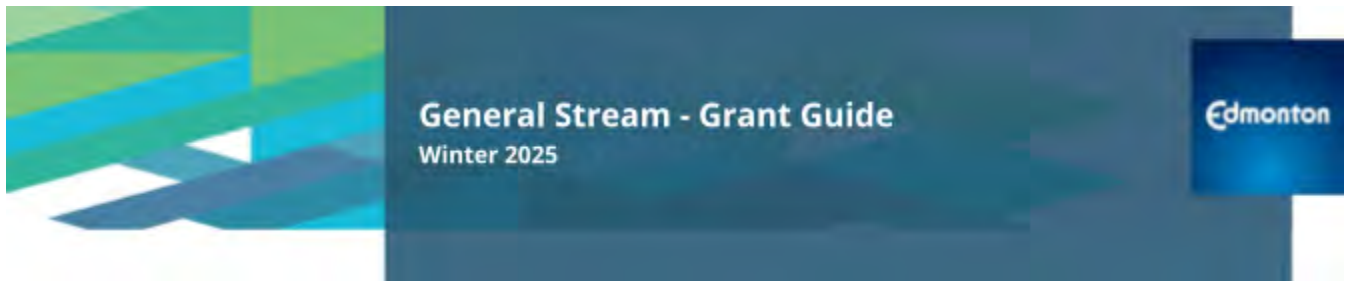
4. Input and output files for the energy consumption modeling for the base case building and proposed rehabilitated development. The files must detail monthly energy consumption for the whole building and by major end-use (e.g. space heating, hot water, lighting, equipment)
5. Any supplemental calculations for energy contributions of renewable energy systems, other systems and conditions not included in the energy and GHG modeling
6. GHG calculations, methodology and assumptions

**21. Accessibility Standards** achieved by the proposed development (description):

- a. Developments must meet minimum accessibility requirements of the National Building Code 2023 Alberta Edition. Developments that provide barrier-free common areas, universal design, or accessible units will score higher during the evaluation process.
  - i. State the number of Accessible Dwelling Units, if any
  - ii. State the total number of units that will be Adaptable Dwelling Units in accordance with National Building Code 2023 Alberta Edition 3.8.4
  - iii. If applicable, provide a narrative of the details of the proposed accessibility strategy within each unit (refer to [CMHC Minimum Environmental & Accessibility Requirements - New Construction](#) Table A or [CMHC Minimum Environmental & Accessibility Requirements - Repairs and Renewals](#) Table A) and identify the barrier-free features from the approach to the building, through the common areas and into the accessible units (refer to [CMHC Minimum Environmental & Accessibility Requirements - New Construction](#) Table B or [CMHC Minimum Environmental & Accessibility Requirements - Repairs and Renewals](#) Table B)
- b. Description of Universal Design achieved by the proposed development
  - i. State whether or not common areas will be barrier-free
  - ii. If applicable, provide a narrative of the details of the proposed universal design strategy within the dwelling units and throughout the common areas (refer to [CMHC Minimum Environmental & Accessibility Requirements - New Construction](#) Table C or [CMHC Minimum Environmental & Accessibility Requirements - Repairs and Renewals](#) Table C)

**22. Project Schedule, including but not limited to expected completion dates for the following:**

- a. Financing confirmed
- b. Construction Tender
- c. Building Permit Issued (if applicable)
- d. Construction Commencement
- e. Construction Completion
- f. Occupancy Permit or Post-rehabilitation Occupancy Permit (or equivalent)



## Engagement / Communications

### **23. Record of previous communications and engagement.**

If no communications or engagement work has been conducted, please indicate as such.

### **24. Support Letters, if available.**

Applicable letters of support from community organizations or other levels of governments are encouraged, but not required.

### **25. Public Engagement Plan, if applicable.**

If the application is approved for grant funding by City Council, a Public Engagement Plan may be required, if deemed necessary by the City.

### **26. Good Neighbour Plan, if applicable.**

If the application is approved for grant funding by City Council, a Good Neighbour Plan may be required, if deemed necessary by the City.

## Financial Information

### **27. Financial Assessment Spreadsheet** - Completed copy of the appropriate version which are available below as well as in [SmartSimple](#):

- a. [Financial Assessment Spreadsheet General Stream \(New Construction - Planned Development\)](#)
- b. [Financial Assessment Spreadsheet General Stream \(New Construction - Reimbursement\)](#)
- c. [Financial Assessment Spreadsheet General Stream \(Rehabilitation - Planned Development\)](#)
- d. [Financial Assessment Spreadsheet General Stream \(Rehabilitation - Reimbursement\)](#)

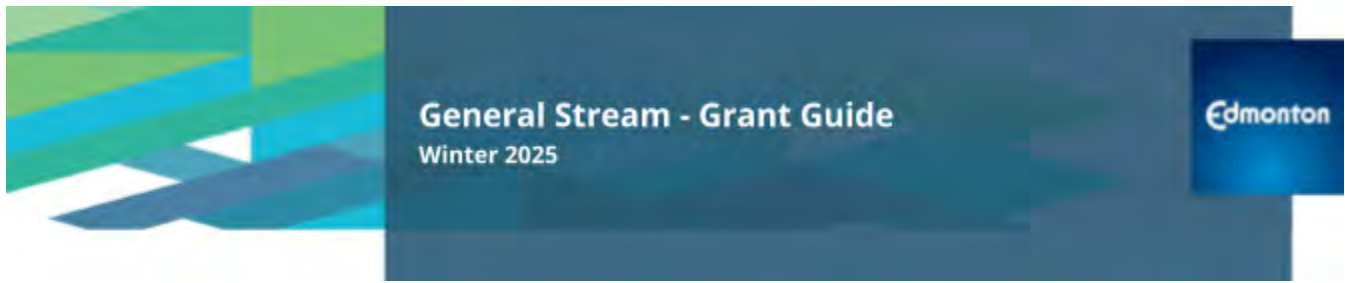
**\*Note: the City may provide grant funding for capital costs, but does not provide funding for land acquisition.**

### **28. Applicant's financial statements** for the previous three years. The types of financial statements required depend on the grant amount requested:

- *Notice to Reader or Internally Prepared* - Grant requests less than \$250,000
- *Review Engagement* - Grant requests between \$250,000 and \$1 million
- *Audited* - Grant requests over \$1 million

### **29. Confirmation of equity:**

Proof of 10% of the total cost of the proposed development must be provided by the Applicant as equity



(i.e. land value, banking statement or a letter from a financial institution), except in special cases as determined by the City of Edmonton

**30. Confirmation of other funding sources and/or financing:**

Written proof of each lender or funder's commitment to the proposed development, including the intended funding amounts and any conditions

**31. Cost Estimates:**

Class D Quantity Survey Report or cost consultant certified report. If neither are available at the time of application, a breakdown of forecasted costs provided by a certified architect, engineer or general contractor may be accepted at the sole discretion of the City.

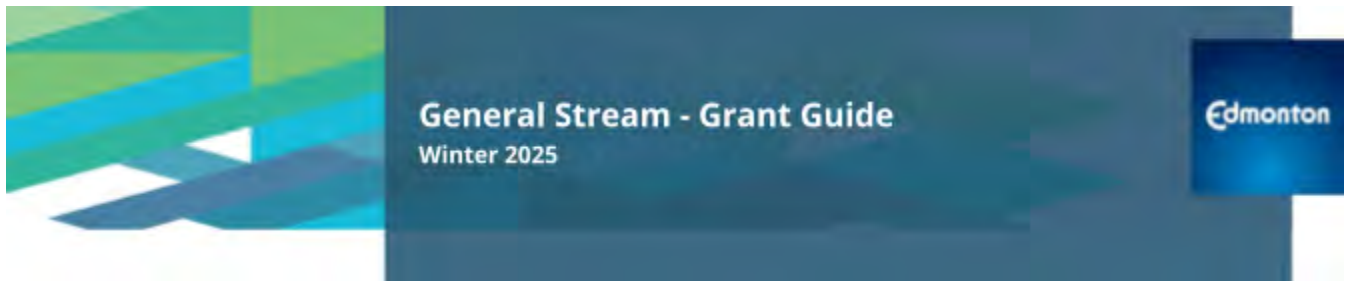
*\*Note: following approval of the application by City Council, a cost consultant certified report will be required prior to execution of the affordable housing agreement.*

**32. Confirmation of bonds and insurance:**

Letter stating the availability of a performance bond, labour and material bond, and proof of construction insurance, as applicable. *The specific bond and insurance coverages required will be identified during the affordable housing agreement drafting process.*

*\*Note: Please ensure to include the estimated cost of bonds and insurance as part of the overall project development cost in the financial assessment spreadsheet.*

**33. Appraisal Report** (Completed by a qualified AIC (Appraisal Institute of Canada) designated Appraiser)



## **Appendix II: Required Documentation and Typical Disbursement Schedule**

The following tables provide a general and non-exhaustive description of typical affordable housing agreement requirements only, and nothing contained herein shall in any way be deemed to fetter municipal Council's authority in any way whatsoever, as the approval of an affordable housing agreement and its terms and conditions are solely and exclusively within the authority of municipal Council.

### **General Stream (New Construction - Planned Development)**

<b>Typical documents required for the Affordable Housing Agreement, to the satisfaction of the City</b>	
Confirmation of Ownership	<ul style="list-style-type: none"> <li>• Certificate of Title demonstrating the land standing in the name of the Applicant as the registered fee simple owner</li> <li>• Confirmation of registration of the affordable housing agreement as a caveat against title to the land standing in the name of the Applicant as the registered fee simple owner</li> </ul>
Development Details	<ul style="list-style-type: none"> <li>• Development Permit, if available</li> <li>• Building Permit, if available, including adaptable unit requirements, as applicable</li> <li>• Preventative maintenance and repair schedule for the development</li> <li>• Energy Modeling Report (including energy consumption requirements of Policy C627, if applicable)</li> <li>• National Energy Code for Buildings Compliance Report (including Greenhouse Gas Emissions and Thermal Energy Demand Intensity requirements of Policy C627)</li> <li>• Public Engagement Plan, if required</li> <li>• Good Neighbour Plan, if required</li> </ul>
Financial Information	<ul style="list-style-type: none"> <li>• An independent report prepared by a licensed and certified third party quantity surveyor retained by the Applicant confirming the estimated total capital costs of the development, with said report issued post-building permit</li> <li>• Progress payment certificates prepared by a licensed and certified third party architect or quantity surveyor retained by the Applicant confirming physical construction of the development at payment milestones (30% and 60% of</li> </ul>

	<ul style="list-style-type: none"> <li>construction completion)</li> <li>• Construction completion certificate prepared and approved by a licensed and certified third party quantity surveyor retained by the Applicant confirming physical construction of the development is complete</li> <li>• Statement of final capital costs prepared and approved by a licensed and certified third party quantity surveyor retained by the Applicant</li> <li>• Production of an appropriate statutory declaration(s) at time of each payment milestone, confirming payment of contractors and subcontractors is up to date</li> <li>• Proof of a Performance Bond, Labour and Material Bond, and proof of insurance</li> <li>• Applicant's licence in good standing for the development under the <i>Continuing Care Act</i>, if applicable</li> <li>• Annual monitoring documents, including reporting on occupancy of affordable units, annual statement of operations for the development, and annual audited financial statements. Additional reporting requirements may apply for developments operated under the <i>Continuing Care Act</i>, if applicable</li> </ul>
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**General Stream (New Construction - Reimbursement)**

<b>Typical documents required for the Affordable Housing Agreement, to the satisfaction of the City</b>	
Confirmation of Ownership	<ul style="list-style-type: none"> <li>• Certificate of Title demonstrating the land standing in the name of the Applicant as the registered fee simple owner</li> <li>• Confirmation of registration of the affordable housing agreement as a caveat against title to the land standing in the name of the Applicant as the registered fee simple owner</li> </ul>
Development Details	<ul style="list-style-type: none"> <li>• Issued Development Permit</li> <li>• Issued Building Permit, including adaptable unit requirements, as applicable</li> <li>• Occupancy Permit</li> <li>• Preventative maintenance and repair schedule for the development</li> <li>• Energy Modeling Report (including energy consumption requirements of Policy C627, if applicable)</li> <li>• National Energy Code for Buildings Compliance Report (including Greenhouse Gas Emissions and Thermal Energy Demand Intensity requirements of Policy C627)</li> <li>• Public Engagement Plan, if required</li> </ul>



	<ul style="list-style-type: none"> <li>• Good Neighbour Plan, if required</li> </ul>
Financial Information	<ul style="list-style-type: none"> <li>• An independent report prepared by a licensed and certified third party quantity surveyor retained by the Organization confirming the estimated total capital costs of the development, with said report issued post-building permit</li> <li>• Construction completion certificate prepared and approved by a licensed and certified third party quantity surveyor retained by the Applicant confirming physical construction of the development is complete</li> <li>• Statement of final capital costs prepared and approved by a licensed and certified third party quantity surveyor</li> <li>• Production of an appropriate statutory declaration(s) at time of sole City payment, confirming payment of contractors and subcontractors is up to date</li> <li>• Proof of insurance, as applicable</li> <li>• Applicant's licence in good standing for the development under the <i>Continuing Care Act</i>, if applicable</li> <li>• Annual monitoring documents, including reporting on occupancy of affordable units, annual statement of operations for the development, and annual audited financial statements. Additional reporting requirements may apply for developments operated under the <i>Continuing Care Act</i>, if applicable.</li> </ul>

**General Stream (Rehabilitation - Planned Development)**

<b>Typical documents required for the Affordable Housing Agreement, to the satisfaction of the City</b>	
Confirmation of Ownership	<ul style="list-style-type: none"> <li>• Certificate of Title demonstrating the land standing in the name of the Applicant as the registered fee simple owner</li> <li>• Confirmation of registration of the affordable housing agreement as a caveat against title to the land standing in the name of the Applicant as the registered fee simple owner</li> </ul>
Development Details	<ul style="list-style-type: none"> <li>• Development Permit, if available</li> <li>• Building Permit, if available, including adaptable unit requirements, as applicable</li> <li>• Post-rehabilitation Occupancy Permit (or equivalent)</li> <li>• Preventative maintenance and repair schedule for the development</li> <li>• Energy Modeling Report</li> <li>• Public Engagement Plan, if required</li> </ul>

	<ul style="list-style-type: none"> <li>• Good Neighbour Plan, if required</li> </ul>
Financial Information	<ul style="list-style-type: none"> <li>• An independent report prepared by a licensed and certified third party quantity surveyor retained by the Applicant confirming the estimated total capital costs of the rehabilitation, with said report issued post building permit, or, if a building permit is not required, issued at an equivalent time prior to construction commencement</li> <li>• Progress payment certificates prepared by a licensed and certified third party quantity surveyor retained by the Applicant confirming physical construction of the development at payment milestones (30% and 60% of construction completion)</li> <li>• Construction completion certificate prepared and approved by a licensed and certified third party quantity surveyor retained by the Applicant confirming physical construction of the rehabilitation is complete</li> <li>• Statement of final capital costs prepared and approved by a licensed and certified third party quantity surveyor retained by the Applicant</li> <li>• Production of an appropriate statutory declaration(s) at time of each payment milestone, confirming payment of contractors and subcontractors is up to date</li> <li>• Proof of a Performance Bond, Labour and Material Bond, and proof of insurance</li> <li>• Applicant's license in good standing for the development under the <i>Continuing Care Act</i>, if applicable</li> <li>• Annual monitoring documents, including reporting on occupancy of affordable units, annual statement of operations for the development, and annual audited financial statements. Additional reporting requirements may apply for developments operated under the <i>Continuing Care Act</i>, if applicable</li> </ul>

**General Stream (Rehabilitation - Reimbursement)**

<p><b>Typical documents required for the Affordable Housing Agreement, to the satisfaction of the City</b></p>	
Confirmation of Ownership	<ul style="list-style-type: none"> <li>• Certificate of Title demonstrating the land standing in the name of the Applicant as the registered fee simple owner</li> <li>• Confirmation of registration of the affordable housing agreement as a caveat against title to the land standing in the name of the Applicant as the registered fee simple owner</li> </ul>



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<p>Development Details</p>	<ul style="list-style-type: none"> <li>• Issued Development Permit</li> <li>• Issued Building Permit, including adaptable unit requirements, as applicable</li> <li>• Post-rehabilitation Occupancy Permit (or equivalent)</li> <li>• Preventative maintenance and repair schedule for the development</li> <li>• Energy Modeling Report</li> <li>• Public Engagement Plan, if required</li> <li>• Good Neighbour Plan, if required</li> </ul>
<p>Financial Information</p>	<ul style="list-style-type: none"> <li>• An independent report prepared by a licensed and certified third party quantity surveyor retained by the Organization confirming the estimated total capital costs of the rehabilitation, with said report issued post-building permit</li> <li>• Construction completion certificate prepared and approved by a licensed and certified third party quantity surveyor retained by the Applicant confirming physical construction of the rehabilitation is complete</li> <li>• Statement of final capital costs prepared and approved by a licensed and certified third party quantity surveyor</li> <li>• Production of an appropriate statutory declaration(s) at time of sole City payment, confirming payment of contractors and subcontractors is up to date</li> <li>• Proof of insurance, as applicable</li> <li>• Applicant's licence in good standing for the development under the <i>Continuing Care Act</i>, if applicable</li> <li>• Annual monitoring documents, including reporting on occupancy of affordable units, annual statement of operations for the development, and annual audited financial statements. Additional reporting requirements may apply for developments operated under the <i>Continuing Care Act</i>, if applicable.</li> </ul>