

SENIORS' SUPPORTIVE HOUSING PROGRAM

**Province-wide
Call for Request for Proposal**

October 23, 2007

BC HOUSING

**Request for Proposal
SSH-RFP-#01**

October 23, 2007

Closing Date and Time:

Proposal must be received by **2:00 p.m.** Pacific Standard Time on
December 6, 2007

Closing Location:

BC Housing
Attention: SSH Program Coordinator
Development Services
RFP for *Seniors Supportive Housing* SSH-RFP-#01
Suite 601 - 4555 Kingsway
Burnaby, BC, V5H 4V8

Contact:

sshcallinquires@bchousing.org

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PART 1: INTRODUCTION

Seniors' Supportive Housing (SSH) is a new program initiative by BC Housing aimed at assisting seniors to maintain their independence through the provision of a supportive housing environment. The program focuses on retrofitting and upgrading existing seniors housing and introduces an inclusive support services package to tenants. Housing enhanced under the SSH Program is designed to complement BC Housing's other programs for seniors. These units will be in developments managed both by non-profit societies and BC Housing.

1.1 Goals and Objectives

The goals and objectives of the SSH Program are:

Goals

- Increase supportive housing options for seniors
- Provide seniors with an opportunity to age-in-place
- Assist seniors to maintain their independence
- Capitalize on existing investment in housing

Objectives

- Convert existing seniors' housing to supportive housing
- Encourage community partnerships that support aging-in-place
- Introduce supportive services into existing housing
- Create cost-effective supportive housing
- Extend the life of converted building for a minimum of a 30-year period.

1.2 Call for Request for Proposal

The purpose of this document is to invite non-profit societies who currently operate a seniors housing project to submit a Request for Proposal (the "RFP submission") to develop supportive housing (the "Project"). The information below is provided to help societies and their community partners understand the opportunities presented by the new funding and to help them make an RFP submission that meets SSH requirements.

It is anticipated that 400 units in the non-profit sector will be funded through this program.

RFP submissions must be received by 2:00 p.m. Pacific Standard Time, **December 6, 2007** to the following:

BC Housing
Attention: SSH Program Coordinator
Development Services
RFP for *Seniors' Supportive Housing Program*
Ste. 600 - 4555 Kingsway
Burnaby, BC V5H 4V8

Four copies of each submission must be submitted, three bound and one in unbound form to facilitate easy reproduction. All four copies should be submitted in one package clearly addressed. See **Part 4. Mandatory RFP Requirements** below.

1.3 How this Request for Proposal is Organized

This RFP is organized in six parts with seven appendices.

Part 1 provides an overview of the SSH program and the call for Request for Proposal.

Part 2 provides a description of the Seniors' Supportive Housing Program including how it complements other BC Housing programs, the services which form part of the program, physical upgrades required and funding available.

Part 3 summarizes BC Housing's funding allocation process and general requirements.

Part 4 states the mandatory requirements for RFP submissions. **Proponents are encouraged to review this carefully** to ensure their submission is complete and meets the requirements set out.

Part 5 provides contact data for questions and sources for further information.

Part 6 comprises the submission format that societies responding to the RFP must follow. This format provides a framework to describe their proposed project including capital and operating budgets, staffing plans and scheduling. Proponents must use the headings and numbers proposed. The content drawn from the submission will be used to evaluate and select the successful Proposal. Appendix E identifies the key criteria that will be drawn from the submission and how they will be weighted in the evaluation.

Appendices A – G provide detailed back up information to the RFP including guidelines for tenant eligibility and for completing capital and operating budgets, additional technical information on required upgrades, the RFP evaluation criteria, the draft operating agreement that will govern projects approved under the SSH program and a program framework outlining comprehensive program information.

Part 2: SENIORS' SUPPORTIVE HOUSING PROGRAM DESCRIPTION

2.1 Overview

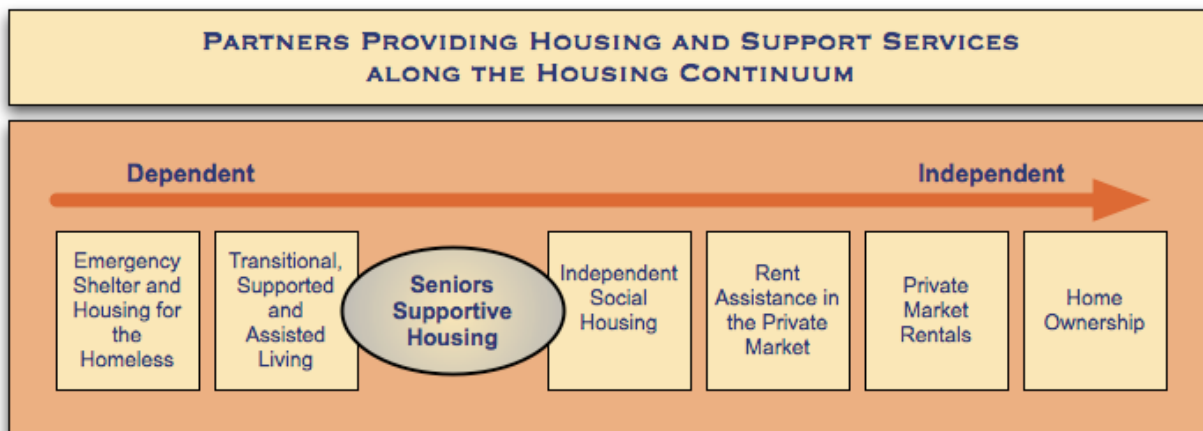
The *Seniors Supportive Housing Program* focuses on retrofitting and upgrading existing seniors housing and introducing an inclusive support services package to tenants. Housing enhanced under the SSH Program is designed to complement BC Housing's other programs for seniors.

The Program is designed to allow seniors to "age in place", and is situated on the housing continuum between transitional and assisted living, and independent social housing. (See diagram below – The Housing Continuum).

The SSH Program features flexibility and responsiveness to the needs of existing and potential tenants of each project to be funded under the SSH program. Although there will be a minimum level of physical upgrades or features added to the building, the level of hospitality services to be provided in each can be varied according to the provider's interpretation of local need.

Under the SSH program, conversion of a whole building, including all units is preferred, although consideration may be given to a Proposal where only a portion of the apartments in a building are to be upgraded. Where a partial upgrade occurs, only those residents in the converted units will be eligible to receive the full program services.

The Continuum of Housing Supports



2.2 Tenant Profile

The tenant profile for SSH projects will target low-income seniors and disabled individuals who are experiencing difficulty living independently, but who are not eligible to participate in the Independent Living BC Program. This group can be defined as "individuals who need additional supportive services to extend their ability to live independently." Tenants of buildings operating under the SSH Program must be eligible for rent geared to income housing and have incomes at or below BC Housing's "Core Need Income Thresholds". Seniors are the priority target population for the SSH program though disabled individuals are eligible to participate in the program.

SSH Program building operators will select tenants in accordance with the criteria set out in a new Operating Agreement (Appendix F).

2.3 Hospitality Services to be Provided

All buildings operating under the SSH Program must be able to provide all hospitality services including meal provision, housekeeping, social and recreational activities. The scope of services to be provided will be determined by each operator and will likely change over time according to the number of tenants requesting services as well as individual tenant needs. In support of their Proposal, operators will be required to provide a brief market analysis or survey, describing the target population for their building and the hospitality services required to meet the needs of this population. Also, given that existing tenants will not be obliged to take advantage of any hospitality services introduced as part of the SSH program. Operators must demonstrate that an implementation plan will be in place identifying those tenants that do not wish to participate in this program.

There is no pre-determined method to deliver hospitality services in a Seniors' Supportive Housing building. Operators are encouraged to consider many factors that could determine the most efficient, cost-effective service delivery model. These factors may include the number of tenants requesting hospitality services, the availability of community resources, the proximity to potential partner organizations (e.g. care facility), and the ability to offer service flexibility. Given that all tenants may not initially request all hospitality services, operators will also be required to address the ease of changing/expanding their service delivery model to provide services to a different mix and/or greater number of tenants in the future.

To the extent possible, tenant payments should cover the cost of hospitality services. Tenant revenue will vary by the size of the project (i.e. the number of tenants) and the income of participating tenants. SSH Program subsidies are available for operating expenses in excess of total tenant revenue to a maximum per diem to be determined. Operators may choose to offer mandatory provision of all hospitality services, service packages for short-term demand (e.g. housekeeping and/or meals for a fixed period) or charges for services as utilized such as meal tickets. Whatever method is chosen, the total tenant payment for housing and hospitality services cannot exceed 50% of income.

The full conversion of all units in a building is preferred but where an operator chooses to convert only a proportion of units in a building under the SSH program, the tenants not resident in the SSH units, who wish to purchase selected services, will not be eligible for subsidy.

Meal Service

Operators must ensure that the nutritional needs of all SSH tenants are being met at least once a day. It is preferred that dining facilities be on-site. However, a shared dining space within another building may be acceptable, (e.g. adjacent assisted living building) if appropriate on-site space is not available and SSH tenants have easy and safe access to the alternative site. This service should be available for purchase by residents of the building but who are non-SSH tenants.

Meals may be provided by a variety of methods dependent upon the number of participating tenants. It is not mandatory that meals are produced on-site by the housing operator. Other options include purchase from local community meal programs or subcontracting with food production agencies, companies or restaurants. Partnerships are also possible with licensed health care facilities or assisted living settings with commercial kitchens that are located near the proposed SSH building. Operators are required to outline the rationale for selecting the meal service delivery model and opportunities for flexibility (e.g. short-term demand; guest meals). As the method of providing daily meals may change over time, operators are asked to outline factors which would determine a change in service delivery and the resulting costs.

The preparation and serving of meals must meet all Environmental Health regulations. Menus must be prepared in advance in accordance with the Canada Food Health Guide, and be posted in a common place for SSH tenants to view.. Where food production kitchens are operated in SSH buildings, kitchen facilities must be compliant with Food Premise regulations and a permit approved before meal services are provided. All employees preparing food must hold a Food Safe (Level II) certificate and all employees serving food must hold a Food Safe (Level I) certificate. Whether or not meal services are contracted from an outside agency/company, documentation must be provided confirming that all regulatory requirements have been met.

Housekeeping Services

Housekeeping services include provision of weekly unit cleaning as well as the laundering of linens and towels at least once a week. These services must be provided to SSH tenants and should also be available for purchase by non-SSH tenants in the building.

Weekly cleaning of individual units should take approximately one hour of staff time. All cleaning supplies, required equipment and staff will be provided by the housing operator. Tenant requests for additional cleaning services to those described as part of the SSH program will not be covered by the SSH program budget and must be agreed to by the Housing Operator and tenant as a separate charge. Operators must present a plan for conducting weekly laundry and housekeeping for SSH tenants, including a proposed budget and schedule. Additionally, operators are required to have policies/ procedures in place to address additional tenant demand (e.g. more intensive service to SSH tenants or purchase of service by non SSH tenants).

Linens and towels will be provided by the tenants and labelled at each tenant's discretion. Personal laundry is the responsibility of the tenants.

Emergency Response

Ongoing 24 Hour emergency response will be funded as part of the RGI Operating agreement and costs will be covered by tenants' rent subsidies from BC Housing (See Appendix F for description.)

Social and Recreational Activities

Social and recreational activities must be provided by operators in all SSH buildings and will be available to all tenants, including those not participating the SSH program, at no additional cost to tenants.

It is not mandatory that all activities are planned and delivered by employees of the operators as many community resources may already provide activities of interest to tenants. Existing social and recreational services can also keep SSH tenants linked with past lifestyles as well as their local community. For these reasons, partnerships with seniors' clubs and service agencies are encouraged as one method of providing social and recreational activities. However, it may be necessary for the operator to coordinate the provision of these activities through the role of an employee. Any staff time required for liaison with community resources and/or coordinate social and recreational activities for SSH tenants should be identified by the operator as an eligible operating expense in the SSH program budget.

Where possible, tenants should be given the opportunity to participate in program planning to ensure events are beneficial and meaningful to the tenant population within each building. Activities must aim to maximize tenant participation and operators are a required to ensure that these objectives are met.

2.4 Monitoring and Performance

Operators are responsible for the quality of all support services provided in their buildings. Buildings operating under the SSH program are not required to register with the Office of the Assisted Living Registrar but remain subject to the Residential Tenancy Act.

BC Housing will inspect SSH buildings and operations to ensure conformity with the standards set down in the Agreements. Operators will be requested to submit to BC Housing their SSH program reports, schedules and budgets, as well as the results of tenant satisfaction surveys on an annual basis.

The assigned BC Housing Property Portfolio Manager will be the Operator's first point of contact for any questions relating the terms and conditions of the SSH Program agreements, including standards and reporting requirements.

2.5 Program Outcomes

Short and long term outcomes of this program include:

- Increased length of stay for tenants in independent housing;
- Reduced number of seniors requiring relocation to assisted living or residential care;
- Creation of increased stock of homes in a supportive living environment; and
- Improvement in health and well-being of tenants.

2.6 Building Improvements

Certain building improvements are to be undertaken as part of the Seniors' Supportive Housing program to ensure that the building will provide an environment that is safe and secure for all tenants and appropriate to the program requirements for the delivery of SSH services. Listed below are key mandatory features to operate an SSH program building. If not already in place, these key mandatory features may be funded through the SSH program budget. In the event that a Society proposes to upgrade only a portion of the existing units these units will be designated "SSH program units." However, where only a portion of a building's units are to be upgraded, accessibility enhancements must be included for all common areas in the building and hospitality space and facilities sized appropriately. The fire and life safety measures identified must be included for all common areas plus all units.

- Accessibility Enhancements:
 - Replacement of in-suite bathtubs with showers, where appropriate
 - Levered door handles
 - Levered faucet handles
 - Grab bars in showers and toilet areas
 - Stability handrails in hallways, as may be required
 - Elevators for buildings of two storeys or more
- Fire and Life Safety:
 - Fire sprinkler system

- In-suite “smart” smoke detectors
- In-suite 24 hour emergency response system, or equivalent
- Enhanced lighting levels at exist stars, corridors and primary egress routes
- Hospitality Space:
 - Amenity space to permit on-site meal service and/or recreational activities
 - On-site or convenient off-site kitchen and ancillary space
 - Household washers and dryers on-site for tenant use.

Those societies that want to add features beyond what is essential for the delivery of the SSH program will be expected to assume the extra capital and operating costs of these features.

2.7 Eligible Projects

Non-profit societies should propose Projects for SSH funding that incorporate

- An existing building with self-contained rental units
- A target population of low income seniors or disabled individuals; and
- A clean plan for appropriate hospitality services.

The number of units available through this Seniors' Supportive Housing Program proposal call is 400 throughout BC. This number may be exceeded if the overall capital costs are lower than projected.

2.8 Evaluation and Selection

RFP submissions will be evaluated by a BC Housing team, based on the information in the RFP submission corroborated as required and, potentially, through an interview with Society representatives.

Those societies demonstrating in their RFP submissions the best potential for success will be given Provisional Project Approval (“PPA”) and asked to fully develop their Proposal within a fixed timeframe. In the interest of achieving a reasonable distribution across the province, BC Housing reserves the right to limit the number of Projects that receive a PPA in any region.

The selection criteria are outlined in Appendix D: Evaluation Criteria.

Societies with submissions that are not selected yet show significant promise may be provided assistance to continue to work on their Projects for future consideration.

2.9 Assistance Available

Capital Funding

BC Housing will provide capital funding to non-profit societies up to \$45,000 per apartment. This funding includes all costs associated with improvement to the projects, including any costs associated with tenant relocation during construction. Funding will be secured by a forgivable mortgage registered on title. Selection criteria for projects will take into account the capital cost of the projects on a per unit basis. The overall selection criteria are set out in Appendix E.

Operating Funding

BC Housing will, as needed, provide **operational funding** to support the provision of **hospitality services**. Each building approved under the SSH Program will be subject to a new Operating Agreement with BC Housing. Operating agreements (the "Operating Agreement") developed at final project approval ("Project Commitment") will establish the terms and conditions under which the society will receive a monthly subsidy to make up the difference between the Project's recognized expenses and the rent revenue from tenants. A copy of the Operating Agreement is attached to this RFP as Appendix G

Tenants will pay 30% of their monthly income for housing as per current rent geared to income schedules. For their housing rent, plus the addition of emergency response and hospitality services, tenants will pay a **maximum 50% of their gross household income**. See Appendix B: Operating Budget Guidelines.

2.10 Security for SSH Assistance

In return for its assistance, BC Housing will require as security a forgivable mortgage registered on title and forgiven progressively over the life of the project. A Section 219 restrictive covenant may be required.

The Society must have a mortgageable interest in the property. The title must be free and clear of any encumbrances or title defects that would affect the mortgageable interest.

2.11 Community Partnership Opportunities

Operators are encouraged to form partnerships to support the most cost-effective service delivery model as well as promote continued linkages between tenants and their home community. There are a number of opportunities for non-profit operators to establish partnerships with the community as part of the Seniors' Supportive Housing Program. Societies may, for example, choose to fundraise in the community for additional features when building conversion occurs. Additional supportive services may also be provided through partnerships with the community, such as assistance with shopping, which enables tenants that cannot easily travel outside their home environment to obtain groceries and other necessary items.

PART 3: FUNDING ALLOCATION PROCESS

The allocation process has three formal stages:

- **RFP Stage.** In response to the Call for Request for Proposal, interested societies develop their RFP submissions in accordance with the requirements outlined in this document.
BC Housing will evaluate the RFP submissions received. Societies with the most promising submissions will be given Provisional Project Approval (“PPA”) and asked to develop their Proposal fully. The terms of the PPA will be set out in an agreement specifying what the Society must do to achieve final approval.
- **Proposal Development Stage.** The societies that have been given PPA must achieve the PPA conditions within a set timeline. Typically, this will involve securing all municipal approvals, completing building plans (renovation), confirming capital costs, agreeing to an operating budget, and completing a hospitality service delivery plan.
- **Project Commitment Stage.** BC Housing will work with the Society throughout the Proposal development stage as it works through its PPA conditions. The goal is to confirm that the potential in the RFP submissions has been realized with respect to the quality and cost of both the housing and hospitality delivery plan. If the Society has a hospitality partner, that party will also have to reconfirm its support at this time. When all PPA conditions have been met, BC Housing makes the formal decision to commit funding to complete the Project and enters into the necessary agreements with the society. Upon that decision and the execution of the necessary agreements, the Project can begin construction.

3.1 Request for Proposal Submissions

The objective of the RFP is to elicit basic information about each Society and its Project to provide a sufficient basis for determining probable success.

The information sought for evaluation purposes falls into the following categories (see also Appendix D):

- The Society’s capacity (governance and experience –in project management, housing operations and delivery of services);
- The hospitality services and operating plan in relation to the target population; and
- The building plan - the housing improvement Proposal. (proposed upgrades including phasing if appropriate.)

The RFP Submission format below is intended to elicit from societies information that demonstrates their preparedness and highlights factors which tend to indicate the success of their Projects. All RFP submissions must follow the order specified in the Submission Format.

3.2 Proposal Development Stage

Once a Society has been given a PPA, BC Housing will make available sufficient Proposal Development Funding (“PDF”) to help societies pay their direct expenses to fully develop their submission. Typical expenses include the following:

- project management fees up to construction or renovation start;
- design fees when the consultants are retained directly by the Society;
- Society legal fees;
- environmental and geo-technical reports when the Society controls the site; and
- such other costs as are agreed to and approved by BC Housing.

PART 4: MANDATORY RFP REQUIREMENTS

All RFP submissions must meet the following requirements:

1. The proponent must be a non-profit society (individually or working in partnership).
2. The proponent must be able to operate senior supportive housing for low-income seniors and disabled individuals.
3. The submission package must be received by the deadline at the address below:

BC Housing
Attention: SSH Program Coordinator
Development Services
RFP for *Seniors Supportive Housing Program*
600 – 4555 Kingsway
Burnaby, BC V5H 4V8

Deadline: 2:00 p.m. Pacific Standard Time, December 6, 2007

4. The submission package must include four copies of the submission – three bound and one in a loose form for easy copying.
5. Two sets of drawings must be submitted (if drawings are part of the submission).
6. The submission must follow the order outlined in the RFP Submission Format. When using a format contained in an appendix, insert it where it should be in the text, not as an appendix.
7. The submission must contain a Letter of Committal in the form provided and executed by a person able to commit the Society.

Note: BC Housing reserves the right at its sole discretion to cancel this RFP and not to award a contract to any of the Societies which respond. Societies are solely responsible for their own costs and expenses in preparing and presenting their submissions and for subsequent negotiations with BC Housing, if any. BC Housing is not liable to pay such costs and expenses nor to reimburse or compensate a Society under any circumstances.

PART 5: QUESTIONS AND ADDITIONAL INFORMATION

Questions of clarification should be submitted in writing and directed to **sshcallinquiries@bchousing.org** by e-mail.

Questions and answers will be posted weekly to the Seniors Supportive Housing Program web page at:

www.bchousing.org/programs/SSH

BC Housing's standard Section 219 Covenant can also be viewed at:

www.bchousing.org/programs/SSH

(For internal use only) BCH # _____
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PART 6: SUBMISSION FORMAT

Societies responding to this call for Request for Proposal must follow the order of the format below in their submissions. Whether using the provided form, or creating an original document, the Society must use the headings and numbers provided.

6.1 Summary Information

Sponsor

Name of Society: _____

Mailing Address: _____

Contact Person and Position: _____

Telephone: _____ Fax: _____

E-mail Address: _____

Incorporation Number: _____

Canada Customs and Revenue Agency Charity Number (if applicable): _____

Letter of Committal

Every submission must include a Letter of Committal in the form presented in Appendix A: Letter of Committal.

Target Clientele

In brief, describe the clientele and challenges being faced that may shorten their ability to remain in the independent living environment. The operator should be able to articulate the benefits of the Seniors' Supportive Housing Program for the proposed clientele.

6.2 Project Summary

Applicants are requested to provide a short written, one page description of the improvements to be undertaken to the building. Included should be whether the number of units in the existing building will remain the same, added to or reduced and the number proposed for upgrade. Applicants should also indicate whether the improvements are anticipated to require moving tenants.

Indicate the total gross floor area (GFA) of the Project – including any existing hospitality space, the number and size of the housing units, and the type of development proposed. (Insert extra rows or columns if necessary.)

Type of construction	Gross Floor Area	Total # of Units and Type*	Area of Units (Typical)	Hospitality Space	
				Existing	Proposed
Existing					
New construction / Addition					
Renovation					
TOTAL					

(* Apartment type – e.g., studio, one bedroom)

Schedule

Target construction start _____

Target completion date _____

Financial Summary

The information provided below must be consistent with the capital and operating budgets submitted:

Financial Summary	Total Project Cost	Per Unit Cost
Capital Costs		
Total Capital Cost		
Work Financed by Society (if relevant)		
Capital Assistance Requested		
Operating Costs		
Total Housing Costs		
Total Hospitality Costs		
Total Operating Costs		
Total Costs		

6.3 Society Experience, Organization and Development Team

Incorporation Documents

Please submit a copy of the Society's Certificate of Incorporation, constitution and by-laws or application for incorporation and draft constitution and by-laws.

Officers, Directors, and Senior Staff Experience

Please summarize Board and management experience in the format below. Do not send individual resumes.

Name	Board Position	Years on Board	End of Term	Occupation / Qualifications & Committee Participation
	Chair or President			
	V-P			
	Secretary			
	Treasurer			
	Director			
	Director			
	Director			
	Director			
	Director			
	Director			
	Executive Director (CEO)			
	Other (specify)			

6.4 Operating Experience

Please summarize the Society's existing operations as requested below. On a separate sheet, indicate if the society has experience with a supportive housing development, including the delivery of hospitality services.

Existing Staffing

If the general staffing categories are inappropriate, substitute more appropriate terms.

Please use Full Time Equivalentents ("FTEs") to count staff. FTE means the number of hours one person would work if they worked one shift (7 – 8 hours daily), five days a week all year minus all statutory holidays and vacation time.

- | | |
|--------------------------------|------------|
| 1. Administrator | _____ FTEs |
| 2. Administrative Support | _____ FTEs |
| 3. Maintenance | _____ FTEs |
| 4. Hospitality Staff (specify) | _____ FTEs |
| 5. Other (specify) | _____ FTEs |
| TOTAL | _____ FTEs |

Client Base

Estimate the number of clients served annually:

1. Clients with similar needs to those the Project will house: _____
2. Total number of all clients _____

Housing

Please outline the housing that the Society now operates:

1. Number of locations (projects) _____
2. Total number of units _____

If the society receives, or has received, funding through any operating agreement, loan agreement, or grant agreement with BC Housing and/or Canada Mortgage and Housing Corporation, for the subject property please provide the BC Housing file number, or the CMHC file number.

6.5 Financial Management Experience

Please outline the Society's financial experience and present status: (Do not attach the Society's audited financial report.)

1. Fiscal year end: _____
2. Date of last audit: _____

Please list the following according to your last audited financial report:

3. Assets: _____
4. Liabilities: _____
5. Retained earnings: _____
6. Total income:
 - a. Income from clients / tenants _____
 - b. Income from government agencies _____
 - c. Fundraising and other sources (specify) _____
7. Total expenses:
 - a. Mortgage expense or rent _____
 - b. Payroll (including benefits) and service contracts _____
 - c. Overhead _____
8. Last fiscal year's surplus (deficit): _____
9. Accumulated surplus (deficit): _____
10. Restricted reserves: _____
11. Last capital project:
 - a. Nature of the project (e.g. housing, program space) _____
 - b. Approximate total capital budget _____
 - c. Completion date _____
12. Please provide the following:
 - a. Last quarterly financial report presented to the Society's board;
 - b. Contact information for a reference from a major funding partner; and
 - c. Any management letters received from the Society's auditor in the past three years.

6.6 Development Team

Development Consultant and/or Project Manager: _____

Mailing Address: _____

Telephone: _____ Fax: _____

E-mail address: _____

Indicate below if the Society has chosen any members of its development team.

Architect: (firm and contact) _____

Address: _____

Telephone: _____ Fax: _____

E-mail address: _____

Construction Management

Construction manager: (contact) _____

Address: _____

Telephone: _____ Fax: _____

E-mail address: _____

6.7 Description of Target Population and Operating Plan

Description of Tenants

Please describe the tenants in relation to the objectives of the *Seniors' Supportive Housing Program*:

1. How will tenants be identified?
2. Expected number of tenants eligible and interested in accessing hospitality services within the existing building _____
3. Which geographic communities will be served by the Project?

Description of Hospitality Plan

Please provide a list with a short written summary of the services required and how the society intends to provide the hospitality services for the project.

Detailed staffing and operation costs are to be provided in the staffing plan and operating budget.

Describe the strategy/relationships with other organizations/resources who will provide hospitality and support services to the tenants.

Staff Plan

Please outline the staff plan for the Project, using a format similar to the one below and provide the following additional information:

- A general rationale for the staff coverage required in relationship to the needs of the target tenants, including justification for the enhanced presence of any housing staff beyond what is required for property management in permanent housing.
- A key defining the hours for each shift, e.g. morning = 8:00 a.m. to 4:00 p.m.; afternoon = 4:00 p.m. to 12:00 midnight, etc.
- Insert in the schedule the job title abbreviation for the time/shift when that incumbent is on site.
- Provide a brief description for each job title if the function of the job is not obvious. (E.g., "bookkeeper" would not need definition, "community development worker" would.)
- Summarize the total number of FTE's required for each staff category – housing and support – to maintain this staffing plan over one year.

	Sun.	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Total (hrs/wk)
Housing Management Staff:								
Morning								
Afternoon								
Midnight								
Total Housing Staff (hrs/wk)								
Hospitality Staff (or contract):								
Morning								
Afternoon								
Midnight								
Total Hospitality Staff (hrs/wk)								

6.8 Operating Budget

Please provide an integrated annual operating budget for the Project in the general format below. Expense items in each column should equal revenue in that column. See Appendix B: *Operating Budget Guidelines*.

	Revenue		Housing	Hospitality	Total Annual
1	Tenant rent				
2	BC Housing subsidy				
3	Other funding: specify source				
4	TOTAL REVENUE				

	Operating Expense	FTE's	Housing	Hospitality	Total Annual
	Staff Wages				
5	Administrator				
6	Administrative Support				
7	Maintenance				
8	Hospitality Staff or contract (specify)				
9	Other				
10	Subtotal Wages				
	Other Staff Costs				
11	Staff Benefits				
12	Staff Vacation Relief				
13	Total Staffing Costs				
	Hospitality Services Expenses: Non-staff (specify)				
14	Food				
15	Kitchen Supplies				
16	Housekeeping Supplies				
17	Laundry Supplies				
18	Recreational Supplies				
19	Emergency Response System				
20	Hospitality Services Reserve Fund				
21	Total Hospitality Costs				
	Office and Overhead				
22	Audit / Accounting Services / Legal				
23	Courier / Postage				
24	Employee Education / HR Programs				
25	Office Supplies				
26	Travel and Vehicle				
27	Miscellaneous (specify)				
28	Total Office and Overhead Costs				

	Operating Expense	FTE's	Housing	Hospitality	Total Annual
	<i>Housing</i>				
29	Property Tax				
30	Building Maintenance				
31	Grounds Maintenance				
32	Service Contracts				
33	Utilities				
34	Hydro				
35	Gas				
36	Water				
37	Sewer				
38	Garbage				
39	Cablevision				
40	Insurance (building)				
41	Replacement Reserve				
42	Contingency for Vacancy Loss				
43	Other: specify				
44	Total Housing Costs				
45	TOTAL EXPENSES				

Cost Summary	
Total per unit per month housing cost	\$
Total per unit per month hospitality cost	\$
Total per unit per month, all costs	\$

6.9 Housing Proposal

Site Description

Please provide the following information for the Project's site.

1. Address: _____

2. Current registered owner: _____

3. Legal Description (including PID): _____

4. Area of site: _____ sq. ft.

5. Interest in land _____

Fee Simple Leasehold Strata Air Space

Other: _____

6. Charges currently on title: _____

7. Current zoning designation: _____
Is re-zoning required: _____

8. Proximity to public transportation:

Type	Distance from Building	
_____	_____	Km

9. Proximity to commercial services:

Type	Distance from Building	
_____	_____	Km
_____	_____	Km
_____	_____	Km

10. Proximity to public services/amenities:

Type	Distance from Building	
_____	_____	Km
_____	_____	Km
_____	_____	Km

12. Proximity to health or support services:

Type	Distance from Building
_____	_____ Km
_____	_____ Km
_____	_____ Km

Please attach a map of the location of the site in relationship to the rest of the community.

6.10 Building Description

1. Number of existing units: _____
2. Typical unit type (include a sketch layout)
3. Area of building (site coverage): _____
4. Construction type:
Wood Frame ___ Concrete Block ___ Concrete ___
Structural Steel ___ Steel Studs ___
5. Building height: _____
7. No. of floors: _____ Basement: Yes ___ No ___
8. Gross floor area (GFA) of existing building: _____ sq.ft.
9. No. of elevators: _____
10. No. of underground parking stalls: _____
11. No. of surface parking stalls: _____
12. Describe heating and ventilation systems: _____
13. Fire suppression sprinkler system: Yes ___ No ___
14. List indoor/outdoor on-site amenities (e.g. lounge, dining room, patio):

6.11 Housing Illustrations

Societies are asked to submit plans showing an existing typical unit, the existing ground floor building plan, and an existing typical upper floor building plan.

Photos of the common areas (lounge, kitchen, hallways, etc.) and a typical unit type should be included.

Where additional amenities are proposed, for example a new dining room, a floor plan identifying the location should be included.

6.12 Phasing Plan

Societies should include a phasing plan for the construction work, if this is necessary. Arrangements for moving tenants if necessary should be included.

6.13 Capital Budget

Please submit a draft capital budget in a format similar to that below and explain in note form the estimates provided. (See Appendix C: Capital Budget Completion Guidelines.)

Project Name: _____

Society: _____

Project Address: _____

Charitable Status (No.): _____ If not applicable, please check

GST Registration (No.): _____

Capital Budget Item	Total	Per Unit
1. Municipal services		
2. Utility fees		
3. Design consultants		
4. Consultants		
5. Miscellaneous soft costs		
6. Construction (inc Const Manager)		
7. Vacancy Loss (if relevant)		
8. Tenant Relocation Costs		
9. Contingencies		
10. Total Capital Budget		
11. Deductions*		
NET CAPITAL BUDGET		

* E.g. community contributions

Society and Community Equity Contributions

Societies may mobilize local financial support to finance other capital work for their project outside that to be financed under this program. Please summarize those contributions below, identifying the source and nature of the contribution under "Description."

Source	Description (including any conditions)	Value
Society		
Municipal government		
Other community partners		
Other		
TOTAL		

6.14 Schedule

As part of the RFP submission, the Society must estimate when it will be able to achieve the major milestones toward completion and occupancy.

The first stage is reaching the point where BC Housing can give the Society a Provisional Project Approval. This will be followed by BC Housing giving a Project Commitment and that will include the society achieving the following items:

- confirmation of all local land use approvals, i.e. Zoning, Development Permit / Variances, Building Permit;
- verification of the capital budget satisfactory to BC Housing;
- agreement on an operating budget satisfactory to BC Housing;
- design drawings and commitment to appropriate specifications satisfactory to BC Housing; and
- confirmation of all required support service funding.
- phasing plan; and
- safety plan

The third stage spans all the work required from Project Commitment by BC Housing to building completion.

The schedule can be in a format similar to that below or as a Gantt chart.

Assume January 30, 2008 as the start date for capital related activities which the Society will initiate once a PPA is received from BC Housing.

Schedule from RFP Submission to Project Occupancy. If phasing necessary please indicate.

Activity	Date of Completion	Time Required (in weeks) for Task and any Comments
1. Feasibility, scope development and costing completed		
2. Design drawings and outline specifications completed		
3. Municipal land use approvals achieved if necessary		
4. Capital budget development completed		
5. Detailed hospitality services plan completed and funding approved		
6. Operating budget completed and approved		
7. Review of working drawings by BC Housing		
8. Project commitment from BC Housing		
9. Completion and execution of contract documents		
10. Building permit issued		
11. Execution of forgivable mortgage, operating agreements		
12. Construction start		
13. First construction advance		
14. Substantial completion		
15. Support Services commence		