

# REQUEST FOR PROPOSALS (RFP)

#### RFP # 1070-2526-022A

For

# New Rental Housing Units Under the Building BC: Community Housing Fund (CHF) 2025

# Within the Province of British Columbia

**Issue Date: May 30, 2025** 

Submission Deadline: July 31, 2025

**Estimated Sequential Submissions** 

- Intake B
- Intake C
- Intake D (Estimated Spring 2026)

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## **REQUEST FOR PROPOSALS (RFP)**

#### 1. INTRODUCTION

#### 1.1 Purpose of this RFP

The purpose of this RFP is to invite experienced non-profit, co-operative and municipal housing providers, and First Nations interested in developing and operating net new low- and moderate-income rental housing units within the province of British Columbia to submit proposals that qualify under the Building BC: Community Housing Fund program (CHF Program).

Specifically, the purpose of this RFP is to solicit proposals that:

- meet local community need for affordable housing;
- can commence construction within a 24-month period upon issuance of award;
- are within acceptable CHF Program capital and operating costs as determined by BC Housing based on funding availability;
- can operate successfully within the CHF Program requirements to provide affordable rental housing for households with a broad range of incomes in a mixed income community, with both Rent Geared to Income (RGI) and Market rental rates;
- meet regional targets set by BC Housing including rural and remote communities, with prioritization of Housing Target Orders<sup>1</sup>;
- advance other mandates of BC Housing including Sustainability and Resilience, Equity, Diversity,
   Inclusion and Belonging (EDIB) and Reconciliation;
- create positive housing solutions for targeted populations.

**Note:** 2025 CHF intake is a rolling proposal call until CHF funding is depleted. This RFP 1070-2526-022**A** is the first intake proposal call and sequential proposal calls (with tender number suffix **B**, **C** and **D**, etc.) will be released on a timely basis following intake closure of this RFP. Submissions should only be submitted to this first intake proposal call if they meet all requirements as outlined within this tender document. Subsequent proposal calls following the closure of this RFP will be based upon remaining program funding after awarding successful projects. Although BC Housing has identified three future intakes, these intakes are tentative only dependent upon remaining available program funding.

Projects may not receive an allocation in a given intake proposal call. If proponents fail to meet the minimum requirements, but are able to meet in a subsequent proposal call, the proponent may resubmit the project in a future proposal call. Projects that are not aligned with CHF Program requirements will not be able to resubmit. Project submissions that meet minimum requirements but did not meet the minimum score thresholds for either Development or Operations or both weighted criteria will be able to resubmit under a future proposal call provided deficiencies are addressed. Project submissions that did not receive an allocation in the first intake proposal call, but which met minimum requirements and minimum score thresholds for both Development and Operations weighted criteria may be forwarded to

<sup>&</sup>lt;sup>1</sup>Housing Target Orders: <a href="https://www2.gov.bc.ca/gov/content/housing-tenancy/local-governments-and-housing/housing-targets/orders">https://www2.gov.bc.ca/gov/content/housing-tenancy/local-governments-and-housing/housing-targets/orders</a>

the next intake should the proponent wish to do so. Proponents will be given the recommendation in the notification letters.

#### 1.2 Deliverables

Proponents should carefully review the Deliverables described in <a href="Appendix1">Appendix 1</a> [Deliverables] of this RFP.

BC Housing's form of Operating Contract is attached as <u>Appendix 3</u>. Proponents should fully review and prepare their Proposal based on the draft Contract. Proponents are strongly discouraged from requesting modifications to the draft Contract or submitting a Proposal that assumes BC Housing will agree to modify the terms of the draft Contract. In the event Proponents propose any modification to the contract, Proponents shall identify this in the completed <u>Appendix 5 [Submission Form]</u> and include it within their submission.

#### 1.3 About BC Housing

BC Housing was established as an agency of the Province of British Columbia in 1967 to administer the province's social housing programs. BC Housing is accountable to the provincial ministry responsible for housing and provides funding for the development, management and maintenance of housing for individuals, families, seniors and disabled persons in need of affordable housing and support.

#### 1.4 Sustainability, Equity & Reconciliation

BC Housing recognizes that procurement opportunities can drive positive economic, environmental, and social impact, and contribute towards our Reconciliation strategy. BC Housing is committed to sustainable procurement whereby both environmental considerations, socially responsible practices and Reconciliation are incorporated into our policies and procedures and impact the products and Deliverables we procure.

#### 2. PROCUREMENT PROCESS

#### 2.1 RFP Timeline

The following is BC Housing's timeline for the procurement process:

Event	Date
Issue Date of RFP	May 30, 2025
Information Webinar (pre-recorded)	June 16, 2025
Deadline for Enquiries	June 23, 2025 @ 2:00 p.m. PT
Deadline for Issuing Addenda	June 30, 2025
Submission Deadline	July 31, 2025 @ 2:00 p.m. PT
	Intake B
Sequential proposal intake to Intake D estimated in Spring 2026	Intake C
2020	Intake D

All above times are Pacific Time.

A firm RFP timeline for individual intakes will be included in the sequential RFPs. Proponents shall submit their proposals in accordance with the timeline posted in the sequential RFP. BC Housing, at its discretion, may change or cancel any or all dates based upon remaining program funding.

The official time of Proposal submission will be determined with reference to the electronic clock used by BC Housing's computer systems or BC Bid, depending on the submission method.

Proposals in response to this RFP <u>must</u> be submitted electronically and received at the following locations (the "**Submission Location**"):

BC Bid <a href="https://www.bcbid.gov.bc.ca">https://www.bcbid.gov.bc.ca</a> (preferred method); or

• Email: <u>BuildingBC@bchousing.org</u>

Proposals delivered electronically via email should have the Proponent's name clearly identifiable and should include the RFP's number and title (as set out on the cover page) in the subject line.

**Note:** The capacity of <u>BuildingBC@bchousing.org</u> inbox is **10MB**. Proponents shall reduce the size of submissions to ensure that their submissions can be successfully transmitted. Should a submission be larger than **10MB**, Proponents shall distribute their submission over several emails adding email number in the subject line (i.e., Email 1 of 3, Email 2 of 3, etc.)

#### 2.2 Contact Person & Enquiries

The contact person for this RFP is (the "Contact Person"):

Name: John Wu

Email: **BuildingBC@bchousing.org** 

All enquiries (**Enquiry**) regarding any aspect of this RFP, should be directed to the Contact Person identified above. All responses to Enquiries from the Contact Person, will be recorded by BC Housing. If BC Housing, for any reason, determines that it is necessary to provide additional information relating to the RFP, such information will be communicated to all Proponents by addenda. Each addendum forms an integral part of the RFP.

#### 2.3 Proposal Content and Structure

Each Proposal must be complete and structured as described in <u>Appendix 5 [Submission Requirements]</u>. This includes submission of all forms and information requested therein.

#### 2.4 Capital and Operating Budgets

The proposed Capital and Operating budgets in the submission shall not be considered as the final BC Housing approved budgets. BC Housing will review the proposed budgets and where necessary, negotiate the final Capital and Operating budgets with the Selected Proponent after award.

#### 2.5 Proposal Validity

All Proposals will be valid for a period of sixty (60) calendar days after the Submission Deadline. Extended validity periods may be negotiated and agreed between the parties.

#### 2.6 Information Webinar

BC Housing intends to provide a pre-recorded Information Webinar for Proponents/Housing Providers on **June 16**, **2025.** The link to the webinar will be communicated via Addendum to this RFP. The purpose of this webinar will be to provide Proponents with an overview of the RFP process and guidance on how to prepare their submissions. Proponents are strongly encouraged to follow this guidance and to submit questions within the RFP timeline if further clarity is required.

#### 2.7 Addenda

BC Housing may, in its discretion, through the Contact Person amend or clarify the terms or contents of this RFP at any time before the addenda deadline by issuing a formal Addendum. Written Addenda are the only means of amending or clarifying this RFP and no other form of communication whether written or oral, including written responses to Enquiries, will be included in, or in any way amend, this RFP. If a Proponent wishes to rely on a written response to an Enquiry, then they should request the Contact Person to issue an Addendum.

#### 3. EVALUATION

#### 3.1 Minimum Requirements

BC Housing has determined Minimum Requirements which are set out in <u>Appendix 2 [Evaluation Criteria and Process]</u>. Proposals that do not meet the Minimum Requirements will not be further evaluated.

#### 3.2 Evaluation Process and Criteria

BC Housing will evaluate Proposals in compliance with the evaluation process and criteria set out in <u>Appendix 2 [Evaluation Criteria and Process]</u>. The evaluation of Proposals will be undertaken by an evaluation committee (the "**Evaluation Committee**") comprised of persons appointed by BC Housing, which may consist of BC Housing employees, third-party consultants, and external stakeholders. The Evaluation Committee may consult with, and receive advice from, technical, legal, financial and other consultants as the Evaluation Committee may, in its discretion, decide it requires.

#### 3.3 Awarding Funding

Following evaluation, BC Housing intends to enter into discussions with the Successful Proponents identified within each Region through the Evaluation process. Discussions will seek to clarify any outstanding issues and attempt to finalize the terms of the Contract. During this process, upon BC Housing's request, the Successful Proponents must provide the documentation listed within <u>Appendix 9 [Post-Selection Documentation]</u>.

BC Housing reserves the right, in its discretion, to negotiate changes to the Contract, the scope of Deliverables, the terms of a Proposal or any other terms, including pricing or other financial terms. BC Housing may require additional approval for the selection of the Successful Proponents and/or the execution of the final form of Contract. This RFP is not an offer and does not obligate BC Housing to obtain the Deliverables.

#### 3.4 No Contract for Deliverables

BC Housing has no obligation to execute a legally binding agreement for the Deliverables as a result of this RFP. This RFP process shall not give rise to the legal rights or duties applied to a formal "Contract A" binding bidding process or any other legal obligations arising out of any tendering process contract or collateral contract, and instead shall be governed by the common law applicable to direct commercial negotiations. BC Housing will have no obligations related to the draft Contract, including the Deliverables, unless and until BC Housing enters the Contract with the Successful Proponent, and then BC Housing's obligations will be limited to those expressly set out in the Contract.

#### 3.5 Unsuccessful Proposals

Unsuccessful Proponents should submit a written request to the Contact Person to request debriefings within thirty (30) calendar days of receipt of notice that the Proponent was unsuccessful.

#### 3.6 Bid Dispute Procedure

If a Proponent wishes to challenge the outcome of the RFP process, the Proponent should provide written notice to the Senior Manager, Supply Chain Services within sixty (60) calendar days of receiving notice that it was unsuccessful. Senior Manager, Supply Chain Management and BC Housing will respond in accordance with its bid dispute procedures.

#### 4. CONFLICT OF INTEREST AND RELATIONSHIP DISCLOSURE

#### 4.1 Relationship Disclosure

Proponents should, as part of their Proposal, submit the relationship disclosure form attached as Appendix 6 [Relationship and Conflict Disclosure Form] and disclose any Conflicts of Interest or unfair advantages. BC Housing reserves the right to disqualify any Proponent that in BC Housing's opinion has a Conflict of Interest or an unfair advantage, whether it is existing now or is likely to arise in the future or may permit the Proponent to continue and impose such conditions as BC Housing may consider to be in the public interest or otherwise required by BC Housing. If a Proponent is concerned that a particular relationship or situation could result in BC Housing rejecting the Proponent, such a Proponent is encouraged to request pre-clearance of the relationship or situation by submitting an Enquiry well in advance of the Submission Deadline.

#### **APPENDIX 1 - DELIVERABLES**

#### 1. Building BC: Community Housing Fund Program

This RFP call is intended to intake affordable housing projects that are construction-ready under the Community Housing Fund program. The allocation resulting from this RFP will aim to balance priority municipalities and regional housing needs including rural and remote communities. Submissions from all areas within British Columbia will be considered.

#### 2. Target Population

The target populations are individuals, couples, families, seniors, and people with disabilities capable of living independently without on-site supports. Priority will be given to these groups; however, Housing Providers/Proponents are encouraged to identify and meet their specific local community needs, within the CHF Program parameters, including forming partnerships with other providers. This may include serving individuals who can live independently without on-site support services, including:

- Women and women with children who have experienced or are at risk of violence.
- Youth, including those transitioning out of care.
- Individuals leaving transitional or supportive housing, referred by Coordinated Access and Assessment Table, and can live independently without supports.
- Equity and/or Rights-seeking community members.
- Other priority groups consistent with the CHF Program, as identified by the Proponent

This program does not include housing with support services or residential care components.

#### 3. Operation of the Project

The CHF Program facilitates the development of mixed income, affordable rental housing projects across the province of BC. Proposals must reflect the following mix of rents and income eligibility within the funded project, as outlined in Appendix 3. For reference, the income mix is as follows:

Income Category	Program Requirement	Rent Category	Income Testing	Rent Amount	Resident Selection*
Low to Moderate Income: Households willing to pay the established market rent, with incomes up to BC Housing's current Low- and Moderate-Income Limits per unit size (\$85,870/\$138,770 effective March 1, 2025²)	30% of Units	Market Rent Unit	Proof of Income and Assets at move-in only.	Initial market rent approved by BC Housing. Greater or equal to CMHC Average Market Rent <sup>3</sup>	residents (using Housing Registry
Low Income: Household incomes below the applicable Housing Income Limits (HILs) but above Deep Subsidy Income.	50% of Units	Rent Geared to Income	Proof of Income and Assets at move in and annually	Varies based on	Provider selects residents from
<b>Deep Subsidy Income:</b> Household income below the Deep Subsidy Income Limits⁵, as established by BC Housing.	20% of units	(RGI)	thereafter for RGI rent calculation.	RGI Rent Scale⁴	BC Housing's Housing Registry

<sup>\*</sup>BC Housing may work with First Nations partners to develop tenant selection options.

The housing provider will be wholly responsible for all aspects of owning and operating the development in accordance with the Operating Agreement, including:

- Equitable and non-Discriminatory resident selection and management to achieve and maintain full occupancy;
- All aspects of property and asset management;
- Resident and neighborhood relations, including community partnerships and engagement;
- Developing and maintaining financial management and governance polices.

<sup>&</sup>lt;sup>2</sup>For residential units with less than two (2) bedrooms, a gross household income that does not exceed the median income for couples without children in BC, as determined by BC Housing from time to time. For 2025, this figure is \$85,870. For residential units with two (2) or more bedrooms, a gross household income that does not exceed the median income for families with children in BC, as determined by BC Housing from time to time. For 2025, this figure is \$138,770.

<sup>&</sup>lt;sup>3</sup> Market Rent should not exceed 30% of the Low- and Moderate-Income Limits. Refer to CMHC Rental Market Report by community / unit size.

<sup>&</sup>lt;sup>4</sup> Refer to sample operating agreement for rent scale details and Rent Calculation Guide for details on RGI rent calculation. Refer to RGI Revenue Estimation Table (RGI Rate and Deep Subsidy Rate) attached in <u>Appendix 11</u> for maximum revenue estimates.

5 For 2024, this figure is \$23,549 for residential units with less than two (2) bedrooms, and \$28,669 for residential units with two (2) or more bedrooms.

**Note:** Projects proposed and owned by First Nations, whether on or off reserve land, can prioritise residents from their membership if the Proponent has or intends to have well established, transparent, lawful and non-discriminatory resident selection polices. These policies must comply with program parameters and enable diverse and inclusive housing communities. Housing providers may target specific populations within their mandate with consideration of, and compliance with, applicable anti-discrimination legislation, the Canadian Charter of Rights and Freedoms, and the program parameters. This must be done in a manner that ensures the required rent and income mix is maintained and revenue is collected as approved in the operating budget, as described in the Sample Operating Agreement (Appendix 3).

#### 4. Housing Provider's Organization Capacity and Team

Housing Providers/Proponents should have adequate capacity and understanding of how to successfully perform the duties of a construction project owner and subsequently operate the future development in compliance with the Sample Operating Agreement.

#### 5. Funding and Financing

The CHF Program is a combination of grant, long term financing and ongoing operating subsidy. In order to secure funding and financing, the proposed project must be able to demonstrate a mortgageable interest.

Within the CHF program framework BC Housing can provide:

- **1. Capital Grant per unit** (secured by 35-year forgivable mortgage):
  - o 2025-2026 Provisional Project Approval is \$171,211 for all unit types.
  - o 2026-2027 Provisional Project Approval is \$178,059 for all unit types.
- 2. Interim Construction/Takeout Financing: up to 100% of construction cost of the residential/housing component, subject to BC Housing lending criteria.
  - o Interim construction financing is provided by BC Housing directly secured as a demand loan
  - Long term takeout financing is facilitated by BC Housing and is insured by Canada Mortgage and Housing Corporation (CMHC) and is secured by 35-year amortized repayable mortgage
- **3. Operating Subsidy:** Limited operating subsidy is available for eligible residential/housing components, where required. Operating subsidy is based on the approved budget, calculated as the shortfall between the approved rental revenue and the approved total operating costs including mortgage payments.

To meet the mortgageable interest requirements, the proposed project must be able to secure Fee Simple or Leasehold before the start of construction if construction financing is required. Minimum Lease term must be **60 years**. Premise lease, subleases and fractional ownership are **NOT** acceptable to CMHC and therefore do not meet mortgageable interest requirements.

Proponents are encouraged to contribute as much equity as possible to increase the viability of undertaking their development. Contributions can be in the form of land (freehold or long-term leasehold interest), or other equity (cash, other assets), that would increase the viability of undertaking

their development. All contributions must be firmly committed and evidenced in the Proponent's submission.

#### 6. Funding Allocation

BC Housing will allocate funding based on the following limitations:

- 1) Only proposals which meet all Minimum Requirements set out in <u>Appendix 2 [Evaluation Criteria and Process]</u>;
- 2) Minimum score threshold in both Development and Operations Weighted Criteria; and
- 3) Limitation of available funding. Capital and operating costs will be reviewed against available funding.

The leading factors for allocating funding include:

- 1) Projects that can advance to construction earlier within the 24-month period;
- 2) Cost effective from both an operating and capital perspective.
- 3) Municipalities with Housing Target Orders<sup>6</sup> by the Province of BC;
- 4) Rural<sup>7</sup> and remote separate provincial target; and
- **5)** Regional parity.

#### 7. Development Requirements

#### 7.1. Project Concept

Proposed projects should meet demonstrate local community need for affordable housing. The site should conform to local land-use requirements and support the proposed project's feasibility through due diligence. If project is on reserve, the governing body of the First Nation must confirm their support for the project.

The unit mix and design shall address the needs of the target population identified in this RFP and the program funding requirements.

Redevelopment projects will be considered under this proposal call. Proponents will need to justify redevelopment of the site at this time by verifying with a third party the remaining economic life in the existing asset. Existing assets with a considerable amount of economic life remaining will be evaluated only on net-new units created.

<sup>&</sup>lt;sup>6</sup> Housing Target Orders: <a href="https://www2.gov.bc.ca/gov/content/housing-tenancy/local-governments-and-housing/housing-targets/orders">https://www2.gov.bc.ca/gov/content/housing-tenancy/local-governments-and-housing/housing-targets/orders</a>

<sup>&</sup>lt;sup>7</sup> Rural areas have concentrations or densities below the thresholds used to define urban areas. Urban areas are those continuously built-up areas having a minimum population concentration of 1,000 persons and a population density of at least 400 persons per square kilometer based on the previous census.

#### 7.2. Proponent's and Project Development Team's Experience and Capacity

The assembled development team. including owner, development consultant, architect and construction contractor must demonstrate capacity, skill and experience in developing residential projects to successfully carry out the assigned deliverables.

#### a. Contract Requirements

Proponents are requested to adhere to the requirements below when executing contracts with the proposed project team. Related construction contracts and corresponding BC Housing SGCs can be found at <u>Construction Contracts | BC Housing.</u>

- Development Consultants engaged by Proponent as a 3<sup>rd</sup> party provider must sign the standard BC Housing Development Consultant Agreement (Appendix 3).
- The Architect assigned to the proposed project must have valid AIBC membership and be in good standing with AIBC throughout the entire project implementation. The Architect must execute a standard RAIC form of contract and BC Housing's contract specific Supplementary General Conditions must form part of the architect's contract.
- Construction Contractor must hold a valid Builder's License as required by BC Housing Licensing & Consumer Services.
- BC Housing's contract specific Supplementary General Conditions must form part of the construction contract and therefore only specified CCDC 5B, CCDC 2 and CCDC 14 contracts can be used.
- Civil works can be performed under separate contract MMCD with BC Housing Supplementary General Conditions

If a Project Team is not assigned, Proponent shall have a well thought procurement strategy in place to engage professionals to design and construct the proposed development to successfully carry out the assigned deliverables.

#### 7.3. Design

#### 7.3.1. Project Design

Proposed project should be spatially efficient and designed to maximize the ratio of residential areas to required programme, support, circulation and service areas. Standardize unit types, kitchen and bathroom layouts within a project as much as possible. Buildings should be simple, efficient; easy to build and easy to maintain. Proposed projects should consider accessibility, durability, sustainability and livability and their relation to capital costs and to lease-up of building and ongoing maintenance. BC Housing may work with Successful Proponents to address critical accessibility, livability, durability and sustainability features. As part of standard fire and life safety features, all proposed projects should include sprinklers.

Building configuration, building size and building envelope should be the main focal point to ensure efficiency and sustainability of the project. Consider density and built form to lower per unit costs.

Non-residential space cannot be more than 30% of the total gross floor area and the total lending value of the project. CHF program components such as resident amenity or ancillary spaces, and parking is considered residential space. Residential and non-residential components must be clearly identified in designs, capital, and operating budgets.

#### 7.3.2. Energy and Sustainability

All buildings without mechanical cooling should not exceed more than 20 overheating hours per year for any climate zone and must adhere to BC Building Code 10.2.3.4 (or VBBL 10.2.2.5). Preference is for buildings to use passive cooling strategies to lessen active cooling load.

Cost effective additional sustainability and resilience features will receive higher scoring:

- Sustainability features (e.g. water conservation measures, avoidance of toxic paints and materials, use of recycled materials, use of native, resilient plants in landscaping)
- Undertaking risk assessment that includes climate hazard identification (e.g. identify if the building is located in a floodplain, wildfire zone, or other elevated risk area)

#### 7.4. Schedule

Proposed projects shall demonstrate the ability to commence construction within 24 months of Notice of Award\*. Detailed schedules should identify the critical path, demonstrate construction acceleration strategies and include all relevant milestones including those indicated for inclusion by BC Housing.

Proposed projects will be assessed on their viability to commence construction within 24 months of award based upon all documentation provided as part of the submission and will not be accepted by BC Housing based on submitted schedule alone.

Earlier construction starts will receive higher scoring.

#### 7.5. Risk and Insurance

#### 7.5.1. Risk Assessment

Proponents shall identify and assess development and operating risks specific to their proposed project and document mitigation strategies/plans as required. Mitigation strategies should impact consequence/likelihood or both.

#### 7.5.2. Course of Construction and Wrap-Up Liability Insurance

To mitigate construction-related risks, all BC Housing projects are required to obtain Course of Construction and Wrap-Up Liability Insurance through the Provincial Construction Insurance Program (PCIP). Administered by the Risk Management Branch of the Ministry of Finance, PCIP provides standardized insurance coverage for public sector construction projects, including those by BC government ministries, health authorities, K–12 public school districts, public post-secondary

<sup>\*</sup> Assume Notice of Award will be issued in the 6<sup>th</sup> week after each intake submission deadline.

institutions, and BC Housing. Marsh Canada Limited is the designated broker for PCIP, selected through a competitive procurement process; therefore, all PCIP-mandated insurance coverage must be arranged exclusively through Marsh, in compliance with the program's framework.

#### 8. Reconciliation, Equity and Diversity

BC Housing is committed to the principles and processes of Reconciliation, Equity and Diversity.

It is expected that Proponents have programs in place that actively support these processes and are involved in activities aimed at boosting opportunities for Indigenous and Equity Seeking Groups. These activities among others should provide employment opportunities to support Indigenous and Equity Seeking Groups in their endeavours to find reliable employment and prosper. Refer to <a href="Appendix 12">Appendix 12</a> - <a href="Employment for Equity Seeking Groups">Employment for Equity Seeking Groups</a> to find out specific groups defined as individuals for employment.

#### 9. Forms of Agreements and Security

The successful Proponent must enter into a **sixty (60)** year Operating Agreement with BC Housing for the management of all residential units within the development.

BC Housing's standard mortgage package for a repayable mortgage of **thirty-five (35)** years, and a forgivable mortgage for the capital grant for **thirty-five (35)** years, will be required. The CHF provides access to construction financing, takeout financing and grants secured by both repayable and forgivable mortgage. Proponents must demonstrate how first-priority mortgage registration will be achieved for interim and repayable financing.

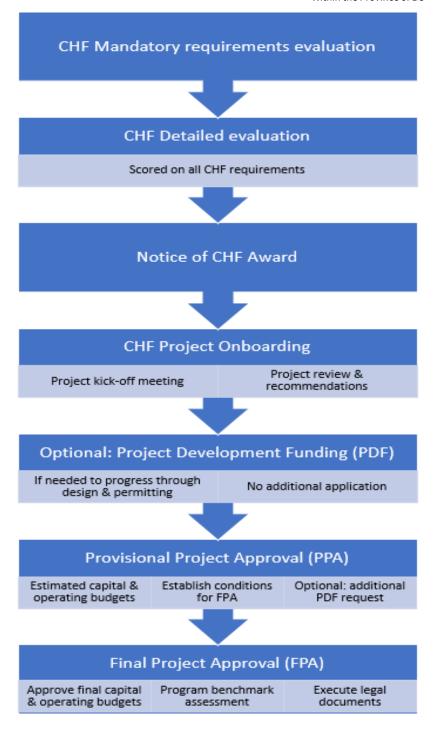
A Section 219 Restrictive Use Covenant and Option to Purchase will be registered against the title. The Restrictive Use Covenant links to an Operating Agreement that must be signed concurrently with mortgage registration. Successful proponents must agree in principle to the terms of the Operating Agreement prior to mortgage registration.

BC Housing, at its discretion, will review other possible sources or models of funding or financing a Proponent may propose, to determine eligibility under this RFP.

#### 10. Proposal Review and Project Approval Process

The following diagram illustrates the stages of review and approval leading to final award.

# CHF Review & Approval Process



**Provisional Project Approval (PPA)** – A BC Housing Development Manager will work with the Proponent to assess and refine aspects of their proposal, including finalizing the construction, takeout financing and operating subsidy requests. Please note that the Development Manager may request adjustments (which may include changes in unit mix or operating budget) to align the proposal with BC Housing's requirements. Conditional approval is granted only after the approval of BC Housing's Executive, BC Housing's Board of Commissioners or the Provincial Treasury Board.

**Final Project Approval (FPA)** – Following PPA, BC Housing reviews and approves capital and operating budgets. All local government approvals are finalized, and the Proponent will execute documents to secure funding.

The RFP process is not a guarantee of receiving BC Housing funding. Funding is conditional upon approval processes, described above, in alignment with BC Housing policies. Depending on the size of the project, some projects will also require approvals from BC Housing's Board of Commissioners, Provincial Treasury Board staff and/or the Provincial Treasury Board. BC Housing reserves the right to decline projects from proceeding due to program and financial deviations, post-award.

#### **APPENDIX 2 - EVALUATION CRITERIA & PROCESS**

The BC Housing Evaluation Committee will review Proposals in three steps, Submission Requirement check, Minimum Requirements check and Rated Criteria Evaluation.

BC Housing will withdraw the submissions from further evaluation if:

- 1) Submission Requirements set out in <u>Appendix 4 [Submission Requirements]</u> are not met within given rectification period.
- 2) Minimum Requirements set out in Section 1 Minimum Requirements in this Appendix are not met.
- 3) Minimum thresholds established for Rated Criteria, either Development or Operations, in this Appendix is not met.

#### 1. Minimum Requirements

Proponents' projects shall meet following Minimum Requirements in order to be advanced to the next phase of evaluation. Proponents are requested to complete <a href="Appendix 7">Appendix 7</a> [Minimum Requirement Check List] and include related documentation to demonstrate the eligibility.

Minimum Requirement	Description	Documentation Required
<ul> <li>1.1. Proponent Eligibility</li> <li>Non-profit society</li> <li>Housing co-operative</li> <li>Municipal housing provider</li> <li>First Nation</li> <li>Public/private entity partnerships with aforementioned entities</li> </ul>	Proponent must be a Non-profit society, housing co-operative, municipal housing provider legally incorporated in Canada, or First Nation.  Public/private partnerships are allowable under the condition that one of the aforementioned entities will ultimately hold ownership and will be the recipient of grant funds and long-term financing.	If First Nation, please confirm whether Indian Act, Land Code, Treaty, Self Governance.
<ul> <li>Non-profit society, Housing co-operative in Good Standing (if applicable)</li> </ul>	Non-profit society, Housing co-operative must be in good standing with the applicable corporate registrar.	Submit confirmation of good standing with applicable corporate registrar. If submitting with a partner, please provide all applicable confirmations.

Minimum Requirement	Description	Documentation Required
<ul> <li>1.2. Mortgageable Interest &amp; Restrictions</li> <li>Fee Simple or Leasehold Only</li> <li>Premise lease and subleases and are not accepted under the CMHC loan insurance and therefore do not meet mortgageable interest requirements.</li> <li>Minimum Lease term must be 60 years.</li> <li>Fractional ownership is not permitted.</li> </ul>	Proponent must have a mortgageable interest in the land. Any leased land must be for a 60-year minimum term. Exception allowable when:  (1) purchase and sale agreement has been entered into; or  (2) submission includes an offer/letter of intent to enter a lease; or  (3) municipal council resolution confirming a lease; or  (4) a letter of intent to purchase; or  (5) First Nation must be willing to provide mortgageable interest through creation of lease or on fee simple if available.	Attach land title or lease if available.  In the event that another entity currently owns the property, provide evidence/documentation on how the land will be transferred to the provider.  For projects On-Reserve: Proposals for projects for which the applicant does not yet have a leasehold or fee simple interest will be considered. Applicants will need to provide a current resolution from the governing body of the First Nation that:  (1) confirms their support for the project; and  (2) commits the First Nation to working towards the issuance of a leasehold tenure that meets BC Housing's requirements as the project advances.
Mortgageable Interest     Restrictions Must Not     Conflict with CHF Program     Requirements	Legal interest in the property must not be unduly restricted by any legal notation, charge, lien, condition or reverter that would conflict with CHF Program Requirements or require additional subsidy to meet third party requirements.	Disclose any legal notation, charge, lien, condition or reverter on title or in process that would place a restriction for the proposed site. Demonstrate how they will not impact ability to delivery on CHF Program Requirements.  Provide any lease terms or municipal agreements.
<ul> <li>1.3. Cross-subsidy</li> <li>No layering or cross-subsidy from other BCH programs permitted.</li> </ul>	Projects may only receive funding from one BC Housing program.	Must demonstrate financial independence if multiple projects on same site.

Minimum Requirement	Description	Documentation Required
<ul> <li>1.4. Site Investigation and Land Analysis</li> <li>Demonstrate project feasibility.</li> </ul>	Proponent to demonstrate project feasibility.  If zoning applicable:  Proposed project must be able to conform to land use.  Projects on reserve:  The governing body of the First Nation must confirm their support for the project.	<ul> <li>Submit all completed due diligence reports.</li> <li>If zoning applicable:</li> <li>Current zoning, confirmation if rezoning is required and status of rezoning.</li> <li>Confirm current and future land ownership and plans for subdivision.</li> <li>Projects on reserve:</li> <li>Provide current Band Council Resolution that supports project</li> </ul>
<ul> <li>1.5. Design</li> <li>Must meet within +/- 5% the CHF efficiency standard of 82%.</li> <li>Non-residential space cannot exceed 30%</li> </ul>	Design must meet within +/- 5% the CHF efficiency standard of 82%. This refers to funded and financed space through CHF only.  If BC Housing financing sought, non-residential space cannot exceed 30%.	Submit current drawings. Identify what stage of drawings based on definitions within Section 5 (Drawings and Document Requirements) in BCH-Design Guidelines and Construction Standards.  Submit generic functional plan. Details can be found Section 1 – Subsection 3.2 Building Size (New Construction Project) in BCH-Design Guidelines and Construction Standards.
<ul> <li>1.6. Fire and Life Safety</li> <li>Must include sprinklers</li> <li>Must mitigate overheating risks in residential units</li> </ul>	All proposed projects should include sprinklers regardless of building height, and mitigate overheating risk using passive and/or active cooling measures.	Confirmation of sprinkler system by architect through current drawings if advanced or letter if drawings are concept or schematic.  Energy model confirming overheating risk analysis of overheating risk not to exceed 20 overheating hours if drawings are advanced beyond DD or architect's letter to describe mitigation strategy if drawings are concept or schematic.  Refer to BC Building Code 10.2.3.4 or 9.36 (or VBBL 10.2.2.5).
1.7. Development Consultant Agreement	Development Consultants engaged by Proponent as a 3 <sup>rd</sup> party provider must sign the	Confirm BC Housing Development Consultant Agreement will be used for

Minimum Requirement	Description	Documentation Required
BC Housing Development     Consultant Agreement	standard BC Housing Development Consultant Agreement.	engaging 3 <sup>rd</sup> party Development Consultant.
Commitment to start construction within 24 months of Notice of Award.	A co-developed schedule endorsed by the entire development team to ensure all parties have capacity and are committed to delivering on all schedule components on time.  Identify construction start within 24 months of Notice of Award.  Projects will be further assessed for their viability to start construction within 24 months of award through required documentation in the Response Forms.  Projects not supported through required documentation will not be considered.	Submit detailed project schedule from project initiation to one year warranty including all listed required project milestones.  Entire development team that has been retained must review, confirm and signoff that the schedule submitted indicating that they will meet their respective milestones.  Written confirmation by Authority Having Jurisdiction (AHJ)/Municipality/First Nation of land use and permit approval timelines indicated in schedule.
Demonstrated capacity as a borrower	Proponent is required to demonstrate its financial capacity as a borrower.	<ul> <li>Either of the following 3 documents is included in the submission.</li> <li>Submit last three years audited financial statements. Unaudited financial statement for the most recent fiscal year that closed will be accepted if the FYE was less than 4 months prior to the RFP Submission Date, with the expectation that the audited financial statements will be subsequently submitted.</li> <li>Compilation or Review Engagement financial statements will be accepted if the proponent does not</li> </ul>

Minimum Requirement	Description	Documentation Required
		have audited statements, and confirms that submitted financial statements have met all prior internal and external (e.g. funder) requirements.
		Proponents that are recently formed, and do not have three full years financial history must provide three years of financial statements for a relevant related entity where available, and/or provide financial statements as of incorporation to current.
1.10. Capital Budget	Construction costs included in capital budget submission must be presented in capital budget to be validated by Construction Manager or Quantity Surveyor.	Capital Budget on required template must confirm the construction costs are validated based on:  • construction estimates by Construction Manager for proposed project based on drawings submitted, or  • construction estimates by Quantity Surveyor for proposed project based on drawings submitted.
1.11. Operating Budget	Operating expenses presented in operating budget to be validated based on third party validation and/or actual operating expenses from current, comparable affordable housing projects.	Operating Budget on required template must confirm the expenses are validated based on:  • actuals for comparable buildings in the proponents Portfolio Summary, or  • a report prepared by a qualified appraiser or licensed property manager.

#### 2. Rated Criteria Evaluation

For evaluation of qualitative criteria, the Evaluation Committee will apply the rated evaluation criteria and weightings on a stand-alone basis in accordance with evaluation guidelines developed and established for the Services requested in this RFP.

#### 2.1. Rated Criteria

BC Housing will score each proposal submitted based on the rated criteria as provided below.

	Rated Criteria Category	Weighting (Percent)	Minimum Threshold
2.2	Development Proposed Project Profile (Site Information, Design, Team & Capacity, Schedule, Risk,) and Capital Budget	60	35%
2.3	Operations Housing Provider Operations, Experience, Capacity & Operating Budget	40	25%
	Total Percentage	100%	

#### 2.2. Proposed Project Profile and Capital Budget (60%)

#### 2.2.1. Project Concept - Site Information

**a. Property Tenure:** In **Appendix 8 – Response Form PART A - Development**, complete **Property Tenure** section to provide information about property tenure. List submitted supporting documents.

#### **Required Documentation:**

Submit supporting documentation such as land title search or parcel abstract report, land title report, letters of intent, purchase and sale agreement, municipal council resolutions, lease terms, Band Council Resolutions.

b. Site Selection and Description: In Appendix 8 - Response Form PART A - Development, complete Site Selection and Description section to provide site description. List submitted supporting documents.

#### **Supporting Documentation:**

Submit all completed due diligence reports including but not limited to: market rent appraisal, valuation report, Environmental Site Assessment, Site Survey, Archaeological Review, and Geotechnical Report.

If a redevelopment project is contemplated, submit third party verification of remaining economic life and budget with funding source.

c. Need and Demand Analysis: In Appendix 8 – Response Form PART A - Development, complete Need and Demand Analysis section to provide a brief analysis of need and demand. If a redevelopment project is proposed, provide rationale for redevelopment at this stage through analysis of remaining economic life in existing development through third party verification. List submitted supporting documents.

#### **Supporting Documentation:**

Submit supporting documentation such as proponent's waitlist information, municipal housing needs report, confirmation of supporting housing targets in identified municipalities with the greatest need and highest projected population growth as stated in the Provincial Housing Target Order.

d. Zoning and Subdivision (if applicable): In Appendix 8 – Response Form PART A - Development, complete Zoning and Subdivision section to demonstrate current stage of zoning, compliance with Official Community Plan, and subdivision and future rezoned state. Please confirm all municipal approvals necessary for the proposed project to conform to land use requirements.

#### **Supporting Documentation:**

Submit relevant municipal correspondence and council minutes or reports.

#### **Evaluation Points:**

- Completeness of the project information
- Comprehensiveness of the analysis in each section
- Evidence within the submitted documentation to support the analysis in each section
- Project feasibility and readiness based on site due diligence
- Appropriateness of site for affordable housing
- Engagement of First Nation/Rights Holder
- Project supported by demonstrated local need and demand
- Project location within municipalities with Housing Target Orders by the Province of BC
- Benefit to First Nation/Rights Holders
- In redevelopment projects, identification of net new units and rationale for redevelopment

#### 2.2.2. **Design**

**a. Development Description:** In **Appendix 8 – Response Form PART A - Development,** complete **Development Description** section to provide basic details about the development and list submitted supporting documents.

#### **Supporting Documentation:**

Include site layout, building schematic, floor plans, drawings in the submissions (if any).

b. Project Design: In Appendix 8 – Response Form PART A - Development, complete Project Design section to provide a description of the project design focusing on how it meets needs of local target population, efficiency requirements; constructability and future maintenance. Provide a description of key features of the building that contribute to accessibility, livability and durability include impact on capital, operating and lease-up. Provide narrative of value analysis done to date and any potential additional cost savings. BC Housing will work with successful proponents to identify further cost savings.

#### **Supporting Documentation:**

Submit building schematic, floor plans, drawings (if any), details of building envelope, value analysis records (past and future), generic functional plan.

c. Sustainability and Resilience: In Appendix 8 – Response Form PART A - Development, complete Sustainability and Resilience section and provide details on sustainability and resilience strategies.

#### **Supporting Documentation:**

Submit energy model report with overheating analysis to confirm design will meet required overheating risk (design development and beyond) or submit letter from architect confirming design will meet required overheating risk if project is at earlier design phase (concept or schematic).

#### **Evaluation Points:**

- Completeness of the project information
- Comprehensiveness of the analysis in each section
- Evidence in the submitted documentation to support the analysis in each section
- Design meets needs of local target population
- Consideration of indigenous values and culture
- Efficiency and sustainability of the project
  - Standardization
  - Density
  - Building Envelope
- Analysis of accessibility, livability and durability features
  - o Impact on lease-up and ongoing maintenance
  - Impact on capital
- Use of passive cooling strategies
- Impact of additional sustainability and resilience features

#### 2.2.3. Project Development Team Experience and Capacity

a. Project Development Team: In Appendix 8 – Response Form PART A - Development, complete Project Development Team section to provide experience and capacity information about owner, development, consultants, design consultants and construction teams assigned to the proposed project. Detail the project management approach for the proposed project and

provide examples from past projects. Provide details on communications with the owner and BC Housing.

#### **Supporting Documentation:**

Submit development team's resumes documenting experience in residential development/affordable housing/with BC Housing; references, license/membership information; list of projects by each project team member (including the owner) currently underway, submit any relevant procurement policies, submit sample reporting/minutes.

b. Construction and Contract: In Appendix 8 – Response Form PART A - Development, complete Construction and Contract section to provide a description on construction methodology and competitive procurement method. Describe consultant and subconsultant roles. List executed contracts if any. BC Housing's Supplement General Conditions (SGCs) shall form part of the Development Consultant, Architect, Construction, and Civic Works contacts. Related construction contracts and corresponding BC Housing SGCs can be found at Construction Contracts | BC Housing.

#### **Supporting Documentation:**

Submit executed contracts. If turnkey project, submit Contract of Purchase and Sale/LOI/MOU.

#### **Evaluation Points:**

- Team composition, skills and experience of project development team
- Project development team capacity
- Fairness, transparency and competitiveness in the procurement policy and method
- Consideration of indigenous and equity seeking groups procurement/hiring
- Project management examples and approach
- Communication both internally and with external stakeholders
- Rationale behind the selected construction method and form of contract
- Buyers' protections if turnkey including attached specifications if available

#### 2.2.4. Project Schedule

**Project Schedule:** In Appendix 8 – Response Form PART A - Development, complete **Project Schedule** section and provide complete project schedule with applicable project deliverables that demonstrates construction commencement within a 24-month period of the issuance of award.

#### **Required Documentation:**

Detailed project schedule signed off by entire development team that has been retained. Includes BC Housing milestones, all requirements of land use approval, development and building permit approvals (including any alternate solution proposed, occupancy permit) and demonstrates construction start within 24 months. Written confirmation by Authority Having Jurisdiction (AHJ)/Municipality of approval timelines indicated in schedule.

#### **Evaluation Points:**

- Completeness of project schedule
- Early commencement of construction
- Feasibility of the project schedule showing critical path
- Opportunities of schedule saving

#### 2.2.5. Project Risks and Mitigation Strategy

**Complete Risk Tab in Appendix 8 – Response Form PART C – Excel Tables** to identify development and operating risks specific to the proposed project and propose mitigation strategy/plan as required. Include risks past and present.

#### **Evaluation Points:**

- Completeness of identification of project risks i.e. failure to identify risks that are deemed as significant by BC Housing will result in lower scoring
- Robust and realistic mitigation strategies
- Demonstrated lowered risk likelihood and consequence through proper mitigation (project management) i. e. failure to demonstrate that past risks have been mitigated will result in lower scoring.

#### 2.2.6. Capital Budget

Complete Capital Budget Tab in Appendix 8 - Response Form PART C - Excel Tables.

#### **Required Documentation:**

Construction costing used in Capital Budget must be supported either by Construction Manager estimates or Quantity Surveyor report or both through independent report.

#### **Evaluation Points:**

- Completeness of the budget i.e all relevant costs included with consideration of BC Housing's costs/suggested guidelines
- Assumptions supported through well-explained rationale
- Performance of development team on previous and current projects
- Performance of housing provider on previous and current projects
- Capital cost analysis of the inclusion or omission of livability, accessibility, sustainability and durability features

#### 2.3. Housing Provider Operations, Experience, Capacity & Operating Budget (40%)

Proponents will be evaluated on responses the following areas, and BC Housing's evaluation may consider past performance of proponent.

#### 2.3.1. Housing Provider Capacity, Experience and Governance

In **Appendix 8 – Response Form PART B - Operations**, complete **Housing Provider Capacity**, **Experience and Governance** section to demonstrate proponent organization's operation capacity, Board/committee member experience and governance.

#### **Evaluation Points:**

- Organization experience in operating rental housing, including resident selection, maintenance and property management
- Board/committee diversity and individual member information, including relevant experience
- Board governance practices
- Processes/actions in relation to Equity, Inclusion, Diversity and Belonging (EDIB) and Reconciliation

#### 2.3.2. Housing Provider Experience, Portfolio Summary and Performance

Complete Housing Provider Experience, Portfolio Summary and Performance section in Appendix 8 – Response Form PART B - Operations and the Portfolio Summary Tab in Appendix 8 – Response Form PART C – Excel Tables.

#### **Required Documentation:**

- Recent Year to Date (YTD)Budget vs Actuals Report for the 5 projects reported in Portfolio Summary; or
- A written description outlining their plan for ensuring relevant skills, knowledge and experience is available to support excellence in operating the proposed project

#### **Evaluation Points:**

- Relevant experience and housing portfolio performance based on up to 5 properties in their current portfolio
- Completeness of required documents

#### 2.3.3. Rental Property Management

In Appendix 8 – Response Form PART B - Operations, complete Rental Property Management section to demonstrate proponent organization's capacity in rental property management.

#### **Evaluation Points:**

- Experience Overseeing and managing operations
- Information Technology (IT) security strategy and policies in place
- Plan in place to maintain property condition, health and safety that demonstrates comprehensive and fulsome approach aligned with budget.
- Core elements of Business Continuity and Emergency Response Plan

#### 2.3.4. Resident Selection & Management

In Appendix 8 – Response Form PART B - Operations, complete Resident Selection & Management section.

#### **Evaluation Points:**

- Transparency of resident selection
- Housing access for equity-seeking groups, with demonstrated community relationships and/or partnerships with relevant stakeholders.
- Tenant communication and engagement plans
- Process of addressing and resolving residents' complaints/concerns

#### 2.3.5. Operating Budget

Complete the Operating Budget Tab in Appendix 8 - Response Form PART C - Excel Tables.

#### **Evaluation Points:**

- Reasonableness and completeness of the budget for the proposed project, including the quality of the assumptions and/or data validation.
- Reasonableness of the budget considering operating cost data and other information submitted for this RFP, as well as past performance of the proponent with other BC Housing funded projects.
- Where the operating proforma yields a PUPM Subsidy that exceeds the available funding, BC Housing may not move forward to further evaluation due to funding availability.

#### 3. Cumulative Score and Proponent Selection

Upon completion of qualitative criteria evaluation all scores from rated criteria evaluation for Proponents who met or exceeded the minimum thresholds will be totalled and ranked from highest to lowest.

Funding will first be granted to the highest ranked Proponents proposing a project in the prioritized communities identified within this RFP. Any remaining funding for this submission deadline will be granted to the highest ranked Proponents within each respective region to create regional parity across the Province. The allocation resulting from this RFP will aim to balance priority municipalities and regional housing needs. Submissions from all British Columbia municipalities will be considered and are not limited to the priority municipalities.

Proponents shall be aware that BC Housing may withdraw the submissions from further evaluation in accordance to **Section 13 - Reservation of Rights** in **Terms of The RFP Process** (Appendix 13).

#### **APPENDIX 3 - DRAFT CONTRACT/AGREEMENTS**

- 1. SAMPLE SECTION 219 COVENANT/ OPTION TO PURCHASE (OTP) (Attached)
- 2. BC HOUSING CHF OPERATING SAMPLE AGREEMENT (Attached)
- 3. BC HOUSING DEVELOPMENT CONSULTANT SERVICE CONTRACT (Attached)
- **4. BC Housing Supplier Code of Conduct** (Attached)

#### **APPENDIX 4 - SUBMISSION REQUIREMENTS**

#### **General:**

The Proponent's Proposal documents should address the requirements set out in this RFP. The Proposal should include sufficient information to demonstrate that the Proponent has a good understanding of the Deliverables and to demonstrate that the Proponent can perform the responsibilities and obligations under the Contract.

Proponents should arrange the content of their Proposal in accordance with the sequencing of and using the section numbers and corresponding titles shown in this Appendix. Any unsolicited information should be included in the section titled "Additional Information".

**Important:** If a template is supplied, all required fields should be populated, and the format of the template may not be changed.

In the event a Proponent proposes multiple projects, separate proposal shall be prepared and submitted for each project with proposed project address clearly identified in the submission file name.

#### **Submission Requirements:**

Proponents are requested to include following documents in their submission in order to advance to the evaluation process. If a Proponent fails to provide information requested in this Appendix. BC Housing may, in its discretion, issue rectification notice to the Proponent. Proponent who receives a rectification notice shall rectify the deficiency(ies) identified in the notice within the time period set out in the notice, expected to be no more than one Business Day. If the Proponent fails to satisfy BC Housing's requirement within the applicable time period, the submission may not be further considered for evaluation.

#### 1. Submission Form (Appendix 5)

Each proposal should include a Submission Form (<u>Appendix 5</u>) completed and signed by an authorized representative of the Proponent.

#### 2. Relationship and Conflict Disclosure Form (Appendix 6)

This form should be completed by the Proponent on its own behalf and on behalf of each member of the Proponent's team including the Key Supplier Resources and Key Firms (if any).

#### 3. Minimum Requirement Check List (Appendix 7)

Proponents shall complete the Minimum Requirement Check List (<u>Appendix 7</u>) and submit it in a **Separate** file and in its original **Word format** to demonstrate their eligibility to advance to rated criteria evaluation.

#### 4. Response Forms to Rated Criteria (Appendix 8)

- Response Form PART A Development (Word format)
- Response Form PART B Operations (Word format)
- Response Form PART C Excel Tables (Excel format)

Proponents shall complete all three Parts of the Response Forms to Rated Criteria in <u>Appendix 8</u> and include them in the submission. Each part should be a **Separate** file in the submission to allow multiple subject experts to evaluate.

If narrative space is provided in the Response Forms, please keep your response brief and follow the page size instruction.

Part C should be submitted in its Original Excel format. No alternation to the formular is allowed.

#### 5. Confirmation to Project Schedule Timeline

A detailed project schedule signed off by entire development team that has been retained. Includes BC Housing milestones, all requirements of land use approval, development and building permit approvals (including any alternate solution proposed, occupancy permit) and demonstrates construction start within 24 months of Notice of Award.

Written confirmation by Authority Having Jurisdiction (AHJ)/Municipality of approval timelines indicated in schedule.

#### 6. Other Required Documents

Include other required documents specified in the Response Forms.

#### **APPENDIX 5 - SUBMISSION FORM**

(see separate attachment)

#### **APPENDIX 6 - RELATIONSHIP AND CONFLICT DISCLOSURE FORM**

(see separate attachment)

### **APPENDIX 7 - MINIMUM REQUIREMENT CHECK LIST**

(see separate attachment)

#### **APPENDIX 8 - RESPONSE FORM TO RATED CRITERIA**

- PART A Development (in Word format)
- PART B Operations (in Word format)
- PART C Excel Tables (in Excel format)

(see separate attachment)

#### **APPENDIX 9 - POST SELECTION DOCUMENTATION**

Upon notification of award, the Successful Proponent, as described within section 3.4 of this document, will be requested to submit the following documentation (*do not include this information as part of your submission*):

#### a. Constating Documents

If deemed necessary by BC Housing, the Successful Proponent shall be required to provide certain documentation specific to their organizational structure. For example, a Non-profit Society may be required to provide a copy of their constating documents and any registered amendments or indicate that they are currently on file with BC Housing. BC Housing will verify that the Successful Proponent's documents comply with BC Housing requirements. BC Housing's constating document requirements are available on the BC Housing website for information only and Proponents are advised not to make any pre-emptive changes to their documents without consulting with BC Housing.

#### b. Insurance

The successful Proponent must, without limiting its obligation or liabilities and at its own expense, purchase and maintain (with insurers licensed in Canada) throughout the term of this agreement Commercial General Liability Insurance in an amount not less than \$10,000,000.00 inclusive per occurrence against bodily injury, personal injury and property damage and including liability assumed under this Agreement.

#### c. Criminal Records Review Act check (If required)

All Suppliers, their employees, subcontractors/trades who are providing services or performing work on BC Housing property (occupied buildings only) are governed by the requirements of the BC Criminal Records Review Act (the "Act") and must pass a CRRA check prior to working on projects that place them around children and/or vulnerable people.

In order for BC Housing to ensure that suppliers, their employees, sub-contractors/trades who are performing work or providing services conform to the requirements of the Act, a CRRA check must be performed.

BC Criminal Records Review Act states; "All individuals who work with children or vulnerable adults, or have unsupervised access to children or vulnerable adults in the ordinary course of their employment, or in the practice of an occupation, or during the course of an education program and who are employed by or licensed by, or receive regular ongoing operating funds from the provincial government are covered under the Criminal Records Review Act."

The selected Proponent must complete a Criminal Records Review Act (CRRA) check through the Ministry of Public Safety and Solicitor General (the Ministry) Criminal Records Review Program (CRRP) for all current employees and new employees hired during the term of the contract, as well as any subcontractors and/or trades who will be performing work on BC Housing properties. Only those with a cleared Criminal Records Review Program check will be allowed to perform work under the contract.

Upon notification of Award, the Successful Proponent will be provided with additional, specific instructions to complete this process.

NOTE: RCMP clearance or any other third-party clearance are not acceptable and will not be considered equivalent.

BC Housing is not responsible for any costs associated with the Criminal Records Review Program checks.

#### **APPENDIX 10 - INFORMATION LINKS**

#### **Procurement Guidelines for Non-Profit Housing**

https://www.bchousing.org/publications/Procurement-Guidelines-for-Non-Profit-Housing.pdf

#### **BC Housing Construction Standards & Guidelines**

https://www.bchousing.org/projects-partners/asset-management-redevelopment/construction-standards

#### **BC Housing's Design Guidelines & Construction Standards**

https://www.bchousing.org/publications/BCH-Design-Guidelines-Construction-Standards.pdf

# BC Housing Design Guidelines and Construction Standards Technical Bulletin No. 3-2013: Sections 2 and 4

https://www.bchousing.org/sites/default/files/media/documents/BC-Housing-Design-Guidelines-and-Construction-Standards-Technical-Bulletin-No-3-Sections-2-and-4.pdf

#### **BC Housing Energy Step Code Model Sample Report Guideline**

https://www.bchousing.org/sites/default/files/media/documents/BC-Housing-Step-Code-Energy-Model-Report-Template.pdf

#### **BC Housing Sustainability Checklist**

https://www.bchousing.org/sites/default/files/media/documents/BCHousing-Sustainability-Standard-Checklist-2023.pdf

#### **BC Housing Guide to Financing for Affordable Rental Housing**

https://www.bchousing.org/publications/CPI-Financing-Affordable-Rental-Housing-Lending-Criteria-Guide.pdf

#### **Community Profiles & Homeless Counts**

https://www.bchousing.org/research-centre/housing-data/homeless-counts

#### **Housing Income Limits**

https://www.bchousing.org/sites/default/files/media/documents/2023-Housing-Income-Limits-HILS-Effective-January-1-2023.pdf

#### **BC Housing's Rent Calculation Guide**

https://www.bchousing.org/projects-partners/guides-toolkits/rent-calculation-guide

#### **BC Housing's Housing Registry for Housing Providers**

https://www.bchousing.org/projects-partners/program-provider-information/housing-registry-for-housing-providers

#### **CMHC Rental Market Report**

https://www.cmhc-schl.gc.ca/professionals/housing-markets-data-and-research/market-reports/rental-market-reports-major-centres

### **CMHC Affordable Housing Fund**

 $\frac{https://www.cmhc-schl.gc.ca/professionals/project-funding-and-mortgage-financing/funding-programs/all-funding-programs/affordable-housing-fund}{} \\$ 

#### **APPENDIX 11 - RGI RENT ESTIMATION TABLES**

RGI rents vary based on actual tenant incomes, and therefore can only be estimated at the proforma stage. The attached tables are included to assist in estimating RGI revenues in accordance with program requirements, as follows:

- DEEP SUBSIDY UNITS (20%): The "Deep Subsidy" rent estimates below should be applied to 20% of units. 1 and 2 bedrooms are based on current Income Assistance Flat Rent for household size.
   3 bedroom or larger units are based on 30% of Deep Subsidy Income Limits for 2 or more bedrooms.
- RGI UNITS (50%): The RGI rent estimates can be applied to the remaining 50% of RGI units, and are based on the assumption that the average income of tenants in these units falls at 70% of the applicable Housing Income Limit. This aligns with the program requirement to serve tenants across the income spectrum.

Proponents must be confident that the rent estimates applied are achievable for their project (e.g. community, location, etc.) and may use lower estimates if required, with accompanying rationale.

2025	1 Bdrm or Less	2 Bdrm	3 Bdrm	4+ Bdrm
Deep Subsidy Units (BC Wide)	\$445	\$635	\$736	\$736
DCI III.				
RGI Units Lower Mainland Planning Area	1 Bdrm or Less	2 Bdrm	3 Bdrm	4+ Bdrm
Abbottsford	\$779	\$963	\$1,365	\$1,601
Chilliwack	\$691	\$945	\$1,076	\$1,173
Норе	\$525	\$665	\$735	\$971
Powell River	\$648	\$674	\$735	\$945
Squamish	\$919	\$1,094	\$1,269	\$1,610
Sunshine Coast	\$718	\$866	\$1,006	\$1,173
Vancouver	\$1,015	\$1,260	\$1,505	\$1,881
Non-Market Areas	\$1,348	\$1,566	\$1,715	\$1,855
Southern BC Planning Area	1 Bdrm or Less	2 Bdrm	3 Bdrm	4+ Bdrm
Ashcroft/Cache Creek	\$508	\$648	\$753	\$884
Castlegar	\$578	\$788	\$928	\$1,076
Cranbrook	\$604	\$735	\$849	\$1,050
Creston	\$534	\$630	\$735	\$866
Elk Valley	\$648	\$648	\$884	\$1,076
Grand Forks	\$490	\$578	\$744	\$875
Kamloops	\$753	\$910	\$1,094	\$1,278
Kelowna	\$866	\$1,146	\$1,426	\$1,426
Kimberly	\$499	\$604	\$683	\$823
Merritt	\$508	\$648	\$700	\$910

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Oliver/Osoyoos	\$578	\$639	\$875	\$1,015
Penticton	\$700	\$963	\$1,391	\$1,391
Revelstoke	\$718	\$744	\$884	\$1,068
Salmon Arm	\$604	\$823	\$936	\$1,068
Trail	\$473	\$604	\$744	\$980
Vernon	\$665	\$875	\$875	\$1,068
Williams Lake	\$586	\$700	\$858	\$1,050
Non-Market Areas	\$1,138	\$1,365	\$1,531	\$1,671
Vancouver Island Planning	1 Bdrm or Less	2 Bdrm	3 Bdrm	4+ Bdrm
Area				
Campbell River	\$726	\$866	\$1,199	\$1,479
Courtenay-Comox	\$770	\$971	\$1,146	\$1,330
Duncan-N.Cowichan	\$639	\$805	\$1,208	\$1,409
Nanaimo	\$770	\$980	\$1,111	\$1,295
Parksville-Qualicum	\$726	\$858	\$1,190	\$1,374
Port Alberni	\$586	\$744	\$1,041	\$1,216
Port Hardy	\$438	\$586	\$788	\$928
Victoria	\$875	\$1,138	\$1,435	\$1,671
Non-Market Areas	\$1,085	\$1,304	\$1,461	\$1,593
Northern BC Planning Area	1 Bdrm or Less	2 Bdrm	3 Bdrm	4+ Bdrm
Chetwynd	\$753	\$840	\$945	\$1,085
Dawson Creek	\$639	\$884	\$1,024	\$1,313
Fort St John	\$683	\$858	\$1,076	\$1,391
Houston	\$455	\$543	\$665	\$770
Kitimat	\$919	\$1,155	\$1,339	\$1,558
Mackenzie	\$683	\$866	\$1,050	\$1,199
Prince George	\$621	\$770	\$858	\$998
Prince Rupert	\$683	\$796	\$796	\$928
Quesnel	\$516	\$613	\$709	\$823
Smithers	\$534	\$648	\$814	\$971
Terrace	\$665	\$840	\$1,006	\$1,138
Vanderhoof	\$516	\$586	\$805	\$928
Non-Market Areas	\$1,190	\$1,426	\$1,610	\$1,741

# **APPENDIX 12 - EMPLOYMENT FOR EQUITY SEEKING GROUPS**

Equity Seeking Groups	Individuals for Employment Definition
Indigenous Peoples	First Nations, Métis, and Inuit people. Sometimes used interchangeably with 'Aboriginal Peoples'.
Racialized communities	Refers to an individual or group of individuals including those who are non-white, including Chinese, South Asian, Black, Filipino, Latin American, Southeast Asian, Arab, West Asian, Japanese, Korean, other visible minorities and multiple visible minorities. Racialized communities also include Indigenous People of nations outside of Canada. Often used interchangeably with "Visible minority group".
Recent Immigrants and Refugees	Immigrant: A person who has been granted the right to live in Canada by immigration authorities and has resided in Canada for less than 5 years.  Refugee: A person who is forced to flee from persecution and who is located outside of their home country. A person who has been recognized as a refugee and who has been granted the right to live in Canada by immigration authorities.
Persons with disabilities/ Disabled Persons	A person with a long-term or recurring physical, mental, psychiatric, intellectual or sensory impairment which, in interaction with various attitudinal and environmental barriers, hinders their full and effective participation in society on an equal basis with others. This is a self-defined characteristic and does not require an external or formal recognition of disability.
Women	Self-identified Self-identified
Members of the LGBTQ2S+ community	An acronym for lesbian, gay, bisexual, transgender, transsexual, queer, questioning, and 2-Spirit
People identifying as experiencing other barriers to economic opportunity and participation (not included in other Equity-seeking group definitions)	A person who identifies as experiencing barriers to their economic opportunity and participation. This could include but is not limited to, an individual with a previous criminal conviction, an individual who identifies as having a drug or alcohol addiction that has affected their ability to participate economically, a person who has experienced domestic violence that has affected their ability to participate economically, a person who is currently experiencing or has experienced homelessness within the last 5 years, single parents, social housing tenants, and youth aging out of the foster care system If an employee identifies themselves in this category, you may consider asking for more information on what they consider this barrier to be – this is voluntary information.
Youth	Individuals aged 29 and under
Veterans	A person who is serving or who has honourably served in the Canadian Armed Forces, the commonwealth or its wartime allies, or as a Regular Member of the Royal Canadian Mounted Police, or as a Peace Officer in a Special Duty Area or on a Special Duty Operation, or who has served in the Merchant Navy or Ferry Command during wartime.

#### APPENDIX 13 – TERMS OF THE RFP PROCESS

#### 1 Receipt of Complete RFP

Proponents are responsible for ensuring that they have received the complete RFP as listed in the table of contents of this RFP. Submission by a Proponent of a Proposal constitutes a representation by that Proponent that they have verified receipt of a complete RFP. Each Proposal is deemed to be made on the basis of the entire RFP, including any Addenda, issued prior to the Submission Deadline.

BC Housing does not accept responsibility for any Proponent lacking any information. Although effort has been made to provide complete and accurate documents, BC Housing does not guarantee that all documents are complete and accurate. Proponents are advised to contact the Contact Person if they notice any errors, ambiguities, or discrepancies in this RFP.

#### 2 RFP Documents and Information

If this RFP has been posted on BC Bid, then all further information related to the RFP will also be posted on BC Bid. In such case, Proponents are solely responsible for ensuring they check BC Bid frequently for updates, including any Addenda, and to ensure the information used by the Proponents to prepare their Proposals is the most current information. If this RFP has been provided directly to a Proponent and is not posted on BC Bid, then BC Housing will provide any updates, including any Addenda, directly to the Proponents in the same manner as this RFP was provided.

#### 3 Rectification Opportunity

If a Proponent has not complied with one or more of the requirements of this RFP, including failing to provide information requested in <u>Appendix 4 [Submission Requirements]</u>, BC Housing may, in its discretion, issue rectification notice to the Proponent identifying the deficiency or deficiencies, in which case the following will apply:

- a) if a Proponent receives a rectification notice, the Proponent will have an opportunity to rectify
  the deficiency or deficiencies described in the notice within the time period set out in the notice,
  expected to be no more than one Business Day;
- b) if the Proponent is able to rectify such deficiency or deficiencies to BC Housing's satisfaction within the applicable time period, the rectified or additional information provided by the Proponent in response to the rectification notice will be deemed to form part of the Proponent's original Proposal submission;
- c) if the Proponent fails to rectify the deficiency or deficiencies to BC Housing's satisfaction within the applicable time period, BC Housing may reject the Proponent's Proposal or may proceed to evaluate the Proposal in accordance with this RFP.

#### 4 Revisions Prior to Submission Deadline

A Proponent may withdraw, revise or amend its Proposal at any time prior to the Submission Deadline by submitting a clear and detailed written notice of the withdrawal, revision or amendment to the Submission Location prior to the Submission Deadline.

#### 5 Change After Submission Deadline

Except for the purposes of clarification pursuant to Section 3, Proponents will not be entitled to change their Proposals after the Submission Deadline. No words or comments should be added to the Proposal after the Submission Deadline unless requested pursuant to Section 3 or by the Contact Person for purposes of clarification. Notwithstanding the foregoing, a Proponent will be required to give immediate notice to BC Housing of any material change that occurs to a Proponent after the Submission Deadline, including a change to its team membership, corporate structure or a change to the Proponent's financial capability.

#### **6** Proposal Extracts

If a Proponent's Proposal includes additional commitments or any other information that either exceeds the requirements of the Contract or that BC Housing wishes to be contractually binding, these commitments or information may be incorporated into the final Contract, at BC Housing's discretion.

#### 7 Signature

<u>Appendix 5 [Submission Form]</u> should be signed by a person authorized to sign on behalf of the Proponent to bind the Proponent to the statements made in the Proposal, and the following will apply:

- a) if the Proponent is a corporation, then the full name of the corporation should be included, together with the name and signature of an authorized signatory; or
- b) if the Proponent is a partnership or a joint venture, then the name of the partnership or joint venture and the name of each partner or joint venturer should be included and an authorized signatory of each partner or joint venturer should sign. If the partner or joint venture is a corporation, then such corporation should sign as indicated in Section 7(a).

Unsigned Proposals, in BC Housing's discretion, may be rejected.

#### 8 Third Party Communications

Communications with:

- a) any representative of a governmental authority, including regulatory, municipal or other such authorities; or
- b) any local property owner, stakeholders in the deliverables or all forms of media,

with respect to the RFP, including the preparation of a Proposal, should only be made by a Proponent with the prior approval of BC Housing, which approval should be requested through the Contact Person by email.

#### 9 Ownership of Proposals

All Proposals, including any intellectual property therein, submitted to BC Housing will become the property of BC Housing, unless otherwise specified in this RFP.

#### 10 Risk Regarding Electronic Communications

BC Housing does not assume any risk or responsibility or liability whatsoever to any Proponent:

- a) for ensuring that any website, online portal or any email system being operated by or for, or used by BC Housing is in good working order, able to receive transmissions, or not engaged in receiving other transmissions such that a Proponent's transmission cannot be received; and/or
- b) if a permitted email communication or delivery is not received by BC Housing, or received in less than its entirety, within any time limit specified by this RFP.

All permitted email or electronic communications with, or delivery of documents to, the Contact Person will be deemed as having been received by the Contact Person on the dates and times indicated on the Contact Person's electronic equipment.

#### 11 Unbalanced Pricing

Proponents should not include unbalanced pricing in their Proposals. Unbalanced pricing exists when, despite an acceptable total Proposal Price, the price of one or more-line items is significantly overstated or understated, as determined by BC Housing acting reasonably. BC Housing reserves the right to reject any Proposal that includes unbalanced pricing or to negotiate changes to unbalanced pricing.

#### 12 Language

Proposals should be in English. BC Housing reserves the right to not review or evaluate any portion of a Proposal that is not in English.

#### 13 Freedom of Information and Protection of Privacy Act

All documents and other records in the custody, or under the control of, BC Housing are subject to FIPAA and other applicable legislation. By submitting a Proposal, the Proponent represents and warrants to BC Housing that the Proponent has complied with all applicable laws, including by obtaining from each individual any required consents and authorizations to the collection of information relating to such individual and to the submission of such information to BC Housing as part of the Proposal for the purposes of this RFP and the procurement process.

#### 12 Confidentiality

Except as expressly stated in this RFP and subject to FIPPA or other applicable legislation, all documents and other records submitted in response to this RFP will be considered confidential; however, such information or parts thereof may be released pursuant to requests under the FIPPA, other applicable legislation or as necessary to prepare for or in connection with the performance of the deliverables.

#### 13 Reservation of Rights

Notwithstanding any other provision in this RFP, no term or condition will be implied based on any industry practice or custom, and BC Housing reserves the right, in its discretion, to:

- a) make public the names and Proposal Prices of any or all Proponents.
- b) if a single Proposal is received, open the Proposal privately and if the Proposal is in excess of BC Housing's budget, then BC Housing may re-issue the RFP without material revisions being made to the RFP and without disclosing the Proponent's name or Proposal Price.
- c) waive minor irregularities in or with respect to a Proposal.
- d) disqualify any Proponent whose Proposal contains misrepresentations or any other inaccurate, false or misleading information.
- e) disqualify any Proponent whose Proposal is materially incomplete or irregular.
- f) disqualify any Proponent who has engaged in conduct prohibited by this RFP or conduct that compromises the competitive process.
- g) disqualify any Proponent whose Proposal would in BC Housing's opinion lead to an unacceptable health or safety risk.
- h) disqualify any Proponent whose Proposal contains any financial or commercial terms that are unacceptable to BC Housing.
- i) disqualify any Proponent if the Proponent has a history of poor performance, documented by BC Housing, including contractual non-compliances, delays, safety issues, financial instability or other ethical or legal concerns
- j) disqualify a Proponent whose Project risks exceed risk tolerance based on BC Housing's evaluation of risk.
- k) disqualify a Proponent who lacks organizational and/or Project/Development team capacity based on references, project history and experience.
- l) disqualify a Proponent whose proposed project is in close proximity with similar housing (e.g., senior housing provided on the same block).
- m) disqualify a Proponent in the event a review of Financial Statements identifies unacceptable risks related to the proponent's capacity and qualification as borrower.
- n) disqualify a Proponent whose project exceeds capital and operating funding available under CHF program.
- o) BC Housing will not be required to complete a detailed evaluation of a Proposal that BC Housing has determined will be disqualified under this section.
- p) make changes, including substantial changes, to this RFP provided that those changes are issued by way of Addenda in the manner set out in this RFP.
- q) cancel this RFP process at any stage.
- r) cancel this RFP process at any stage and issue a new procurement for the same or similar Deliverables.
- s) reject any or all Proposals.
- t) modify, suspend or terminate this RFP at any time for any reason (including if the prices in the Proposals exceed available funding) and to reissue a request for proposals, or to undertake another procurement process for the deliverables, or to obtain the deliverables in some other manner or decide not to proceed with the deliverables.
- u) negotiate any aspects of a Successful Proponent's Proposal.

This RFP does not commit BC Housing in any way to select a Successful Proponent or to enter into any agreement or to proceed with a procurement process for the deliverables.

#### 14 No Representation or Warranty

By submitting a Proposal, each Proponent acknowledges and represents that its Proposal is based on its own examination, knowledge, information, and judgment, and is not based upon any statement, representation, or information made or given by BC Housing, the Contact Person or any other person, other than the information contained in this RFP. Submission of a Proposal is deemed to be conclusive evidence that the Proponent accepts the terms herein.

#### 15 Proponent's Expenses

Proponents are solely responsible for their own expenses in preparing, and submitting Proposals, and for any meetings, negotiations or discussions with BC Housing or their representatives and consultants, relating to or arising from this RFP.

#### 16 Limited Claim for Compensation

#### **Each Proponent:**

- a) agrees that it will not bring any claim, action, demand, suit or cause of action, whether arising in contract, tort (including negligence) or otherwise (a "Claim") in excess of the amount equivalent to the reasonable costs incurred by the Proponent in preparing its Proposal against BC Housing or any of BC Housing's respective employees, directors, officers, advisors or representatives for any costs, damages or other compensation for any matter relating directly or indirectly to this RFP (including, without limitation, in the event that BC Housing rejects or disqualifies or for any other reason fails to accept a Proposal, fails to proceed with the deliverables or otherwise breaches the terms of this RFP or any duties arising from this RFP); and
- b) except for Claims for amounts less than or equivalent to the reasonable costs incurred by the Proponent in preparing its Proposal, as described in Section 16(a), waives any Claim against BC Housing or any of its respective employees, directors, officers, advisors or representatives for any compensation of whatsoever nature or kind including, without limitation, for loss of anticipated profits, indirect, incidental or consequential damages or losses if the deliverables do not proceed or no Contract is entered into between a Proponent and BC Housing for any reason whatsoever, including, without limitation, in the event that BC Housing rejects or disqualifies or for any other reason fails to accept a Proposal.

#### 17 No Collusion

By submitting a Proposal, the Proponent, and each firm, corporation or individual member of the Proponent represents and confirms to BC Housing that the Proponent has prepared its Proposal without any connection, knowledge, comparison of figures, arrangement or collusion with any other person or persons submitting or participating in the preparation of any other Proposal.

#### 18 No Solicitation

The Proponent should not make any representations or solicitations to any elected or appointed official or to any director, officer or employee of BC Housing with respect to the RFP or a Proposal either before or after submission of the Proposal except as expressly provided herein. If any director, officer, employee, agent sub-contractor, supplier or other representative of the Proponent communicates with any elected or appointed official or any director, officer or employee of BC Housing, or any consultant engaged by BC Housing in connection with this RFP about this RFP, other than the Contact Person, BC Housing may, at its discretion and regardless of the nature of the communication, reject the Proposal submitted by the Proponent.

#### 19 Trade Agreements

The procurement process described in this RFP is subject to various trade agreements, including the Canadian Free Trade Agreement, Comprehensive Economic Trade Agreement and New West Partnership Trade Agreement.

#### 20 Governing Law

This RFP is governed by the law of British Columbia and the laws of Canada applicable therein.

#### 21 Interpretation

In this RFP:

- a) any action, decision, determination, consent, approval or any other thing to be performed, made, or exercised by or on behalf of BC Housing, including the exercise of "discretion" or words of like effect, unless the context requires it, is at the sole, absolute and unfettered discretion of BC Housing
- b) the use of headings is for convenience only and headings are not to be used in the interpretation of this RFP; and
- c) the word "including" when used in this RFP is not to be read as limiting.