

BLATCHFORD



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SUBMISSION PACKAGE

Proposal Submission Requirements

This package outlines the proposal submission requirements for the Blatchford Affordable Housing listing.

The submission requirements are separated into 5 distinct sections:

- A. Applicant Qualifications1-2
- B. Proposed Development3-5
- C. Proposed Operations Model6-7
- D. Financial Information8
- E. Additional Submission Terms and Conditions9-10
- F. Evaluation Criteria and Weighting.....11

A. APPLICANT QUALIFICATIONS

1. Organizational Profile:

- a. Mission, mandate, and history
- b. Organizational structure and key roles relevant to the proposed affordable housing development
- c. Experience in affordable housing, community development, and other relevant or related social programs

2. Operations and Property Management Experience:

- a. Applicants must demonstrate their capacity to operate and manage affordable housing developments of a similar type and scale to the proposed project. The Applicant, or a proposed property management entity, must have a minimum of five (5) years of experience in the operations and management of comparable properties. Provide examples of relevant property management experience, as it relates to affordable housing, including the following details for each example provided:
 - i. Name of the property
 - ii. Property address
 - iii. Type of property (e.g. row house, low rise apartment, highrise, etc.)
 - iv. Number of total housing units and affordable housing units
 - v. Programs and support services provided, if any (e.g. off-site support services, on-site support services)
 - vi. Number of years of management experience with the property
 - vii. Community engagement and/or relationship building experience

3. Development and Construction Experience:

- a. Applicants must demonstrate their capacity to deliver housing developments of a similar type and scale to the proposed project by providing evidence of past development and construction experience, either directly or through key project partners. For each relevant completed or active project submitted, provide:
 - i. Name of the property

A. APPLICANT QUALIFICATIONS (CONT.)

- ii. Property address
 - iii. Type of property (e.g. row house, low rise apartments, highrise, etc.)
 - iv. Number of total housing units and affordable housing units
 - v. Overall budget for the proposed development
 - vii. Year completed (or projected completed year for ongoing projects)
 - viii. Community relationship building experience
 - ix. Demonstrated construction safety practices (i.e. Certificate of Recognition (COR) for meeting the Alberta audit standard for health and safety)
- b. In addition, applicants must provide a summary of key development partners from the example projects provided, including:
- i. Architectural and engineering consultants
 - ii. General contractors or
 - iii. Construction managers
 - iv. Major sub-trades: Mechanical, Electrical, Flooring, Framing (for wood structures), Concrete (for concrete structures) Painting, Drywall
- c. If known, applicants may also identify which partners they anticipate engaging for their proposed affordable housing development.

4. Required Supporting Documents:

- a. In accordance with [City Policy C437A](#), City land assets are made available for below market sale or lease to non-profit organizations for the purpose of affordable housing development. To confirm eligibility, Applicants must include the following documents:
- i. Incorporation documents
 - ii. Organizational bylaws

B. PROPOSED DEVELOPMENT

Provide a comprehensive description of the proposed development, including the following:

1. Development Concept and Description

- a. Provide a narrative overview of the proposed development concept including:
 - i. Built form (i.e. multi-unit housing or mixed use building)
 - ii. Alignment with zoning
- b. If applicable, describe any resident-serving programs or supports that will be offered, such as:
 - i. On-site support services
 - ii. Staffing
 - iii. Partnerships with community agencies
 - iv. Intended programming that promotes housing stability, community connection, or resident well-being

2. Development Schedule*

- a. Provide a detailed proposed timeline for all major project milestones, including but not limited to:
 - i. Planning and design
 - ii. Project communications/information sharing
 - iii. Confirmation of financing
 - iv. Construction tendering and procurement
 - v. Development and building permit submissions
 - vi. Construction commencement
 - vii. Construction completion
 - viii. Occupancy

*NOTE: Proposals demonstrating readiness to commence construction imminently will receive higher ranking at proposal evaluation.

B. PROPOSED DEVELOPMENT (CONT.)

3. Site Plan and Layout

- a. Provide a tentative site plan illustrating building placement, access, and outdoor space considerations.

4. Housing Units*

- a. Provide a breakdown of the number of housing units including:
 - i. Total number of housing units
 - ii. Housing unit mix, specifying the number of bedrooms and bathrooms
 - iii. Unit types, specifying whether units are self-contained (living, kitchen, and washroom facilities used exclusively by one household), or shared accommodations (living, kitchen and washroom facilities shared by more than one household)
 - iv. Affordability breakdown, if the proposed development will include a mix of affordable and market units

*NOTE: Proposals providing higher density (100 units or more) with higher affordability breakdown will receive higher ranking at proposal evaluation.

5. Common Amenities

- a. If applicable, describe:
 - i. Resident-serving common spaces and amenities (e.g. laundry rooms, indoor gathering spaces, bicycle storage, etc.)
 - ii. Community value-adds or amenities (e.g. community gardens, play areas, outdoor gathering spaces, etc.)
 - iii. Other enhancements that support neighbourhood integration

B. PROPOSED DEVELOPMENT (CONT.)

6. Environmental and Energy Performance

- a. All development in Blatchford is required to adhere to the [Blatchford Green Building Standards](#) for energy conservation and sustainability. Provide confirmation that you will adhere to these requirements.

Please note that applications for capital funding through the [City's Affordable Housing Investment Program](#) will be required to meet the program's Energy Efficiency minimum requirements with an energy modeling report (prepared by a professional with energy modeling experience) required prior to execution of an affordable housing agreement.

7. Accessibility*

- a. Developments must meet minimum accessibility requirements of the National Building Code 2023 Alberta Edition.
 - i. State the number of Accessible Dwelling Units, if any
 - ii. State the total number of units that will be Adaptable Dwelling Units in accordance with National Building Code 2023 Alberta Edition 3.8.4
 - iii. If applicable, provide a narrative of the details of the proposed accessibility strategy within each unit and identify the barrier-free features from the approach to the building, through the common areas and into the accessible units
- b. Description of Universal Design achieved by the proposed development
 - i. State whether or not common areas will be barrier-free
 - ii. If applicable, provide a narrative of the details of the proposed universal design strategy within the dwelling units and throughout the common areas

*NOTE: Proposals that provide barrier-free common areas, universal design, or accessible units will receive a higher ranking at proposal evaluation.

C. PROPOSED OPERATIONS MODEL

Provide a detailed description of the proposed operations model for the proposed development, including the following:

1. Demonstrated Need and Demand

- a. Provide evidence supporting the need and demand for the type of affordable housing being proposed, which may include, but is not limited to:
 - i. Market studies demonstrating local need
 - ii. Existing wait lists for comparable or the same type of affordable housing
 - iii. Vacancy rate information, particularly where low vacancy rates indicate unmet demands

2. Target Demographic(s)

- a. Describe the population(s) the proposed development will serve (e.g. Women and children fleeing domestic violence; Female heads of household, especially single mothers; Seniors 65+; Young adults aged 18–29; Indigenous peoples; Racialized people; Recent immigrants, especially refugees; LGBTQ2S+; People with physical health or mobility challenges; People with developmental disabilities; People dealing with mental health and addictions issues; Veterans; or People experiencing homelessness)

3. Affordability Term*

- a. Specify the number of years the proposed development will remain affordable.
- b. The affordability term must correspond to the length of the lease, up to a maximum agreement term of 99 years (For lease only).

*NOTE: Proposals offering longer affordability terms will receive higher ranking at proposal evaluation.

4. Eligibility and Tenant Selection for Affordable Housing Units

- a. Describe the proposed approach to determining:
 - i. Tenant eligibility
 - ii. Tenant selection methods (e.g. self-referral, coordinated intake or referrals from partner agencies or by others)

C. PROPOSED OPERATIONS MODEL (CONT.)

5. Affordability Requirements*

- a. Household incomes of eligible tenants must fall below the City's [income threshold limits](#). Describe how the proposed development will meet or exceed the City's affordability criteria. At minimum:
 - i. Rent payments must not exceed the applicable City of Edmonton's [Maximum Allowable Rental Rates \(MARR\)](#); OR
 - ii. At least 30% of all residential units must be:
 - Provided at no more than 80% of median market rents, as determined by the City; OR
 - Rent-Geared-to-Income (RGI), with payments not exceeding 30% of the tenant's gross household income;

*NOTE: Proposals offering greater overall affordability will receive higher ranking at proposal evaluation.

6. Property Management

- a. Provide details on how the property will be operated and maintained, including:
 - i. Property management structure (i.e. on-site presence or scheduled visits (if scheduled visits, indicate frequency of service – daily, weekly, on-call, etc.))
 - ii. Utilities and services included in tenant housing charges (e.g. heat, water, electricity, internet, landscaping maintenance, snow removal, parking, bicycle storage, etc.)

7. Property Operations

- a. Provide information on how the proposed development will be operated once completed, including:
 - i. A high level overview of the proposed operating approach
 - ii. If known, identification of the organization responsible for ongoing operations
 - iii. Details on the types of support programs or resident-serving services that will be offered and whether those services will be located on-site or off-site.

D. FINANCIAL INFORMATION

Applicants must provide the following financial documentation to demonstrate project viability and organizational financial capacity.

1. Financial Assessment Spreadsheet

- a. A completed copy of the [Financial Assessment Spreadsheet New Construction \(A\) – Planned Development](#)

2. Financial Statements

- a. Audited financial statements for the previous three fiscal years.
 - i. If audited financial statements are not available at the time of application, a Review Engagement Report may be accepted at the sole discretion of the City during the application stage.
 - ii. The successful Applicant will be required to provide the City with audited financial statements that are satisfactory to the City prior to execution of the Affordable Housing Agreement.

3. Confirmation of Equity Contribution

- a. Proof that the Applicant can provide at least 10% of the total capital cost of the proposed development as equity (i.e. bank statement, market value of owned property, or a letter from a financial institution).
 - i. Exceptions may be considered only in special cases (i.e. project is fully funded), at the City's sole discretion.

4. Confirmation of Other Funding Sources and/or Financing

- a. Written confirmation of commitments from all lenders and funders including:
 - i. Intended funding amounts
 - ii. Conditions or requirements associated with the funding
 - iii. Status of approval (e.g. conditional, formal approval)

5. Cost Estimates

- a. A Class D Quantity Survey Report or a cost consultant certified estimate that includes detailed projections of:
 - i. Hard costs
 - ii. Soft costs
 - iii. Contingencies
- b. If neither is available at the time of application, a breakdown of forecasted costs prepared by a certified architect or engineer may be accepted at the City's sole discretion.

E. ADDITIONAL SUBMISSION TERMS AND CONDITIONS

Cost of Submission of Proposals

All costs associated with the preparation and submission of a proposal are the sole responsibility of the Applicant. The City is not responsible for any expenses incurred by Applicants in relation to:

- Preparing or submitting a proposal;
- Attending meetings, interviews, or presentations;
- Participating in negotiations or discussions; or
- Finalizing the Lease Agreement or Affordable Housing Agreement, as applicable.

Reservation of Rights

The City reserves the right, in its sole discretion, to exercise any or all of the following rights:

- Accept, reject or further negotiate with any or all Applicants;
- Amend the project scope, modify, suspend, or cancel this listing or any or all stages of the process, at any time, for any reason;
- Provide additional contributions, beyond what is described in this listing, to a successful Applicant if any other City programs or external government funding opportunities become available, with no obligation to provide or proffer any such additional contributions to any Applicant;
- Re-advertise the opportunity for new proposals or enter into negotiations for the site, the project or for a project of a similar nature;
- Extend any date, time period, or deadline specified in this listing through written notice to all affected Applicants; and
- Decline to enter into a Lease Agreement or Affordable Housing Agreement with any Applicant.

No Liability

By submitting a proposal, the Applicant specifically agrees that it will have absolutely no claim against the City, or any of its employees, agents, advisors or representatives for anything resulting from the exercise of any or all of the rights set out in this listing or the City's decision making process.

E. ADDITIONAL SUBMISSION TERMS AND CONDITIONS (CONT.)

Without limiting the generality of the foregoing, the Applicant agrees that, in no event will the City, or any of its employees, agents, advisors or representatives, be liable, under any circumstances, for:

- Costs incurred in preparing or submitting a proposal;
- Loss of anticipated profits;
- Loss of business opportunity;
- Damages arising from the City's decision to accept, reject, or negotiate with any Applicant; or
- Any other matter related to this listing.

No Contractual Obligation

This listing is intended solely to solicit interest and information from potential Applicants, and does not create any legally binding obligations on the City.

This listing process is governed by the law applicable to direct commercial negotiations. As such:

- This listing will not give rise to any "Contract A" based tendering law duties or any other legal obligations arising out of any process contract or collateral contract.
- Neither the Applicant or the City has, or will have, the right to make a claim of any kind, whatsoever, against the other, with respect to the award of a contract, or the failure to honour a response to this listing.

F. EVALUATION CRITERIA AND WEIGHTING

Proposals will be evaluated using a weighted scoring framework to ensure a fair, transparent, and consistent assessment process. The evaluation will focus on identifying the proposal that best achieves the City's objectives for the delivery of affordable housing on the Site.

The evaluation criteria and associated weightings are set out in the table below and reflect the City's priorities, including alignment with the City's Affordable Housing Strategy, quality and feasibility of the proposed development concept, the financial and operational sustainability, the proponent's experience and capacity, and overall deliverability of the proposed development.

	EVALUATION CRITERIA	WEIGHTING
A	Applicants Qualifications	15
B	Proposed Development	20
C	Proposed Operations Model	35
D	Financial Information	30
	Total	100

The weightings are intended to guide the relative importance of each criteria; however, the City reserves the right to consider the overall merits of each proposal, including the extent to which a submission demonstrates readiness, viability, and the ability to successfully deliver and operate the proposed development over the term of the lease or the affordable housing agreement.

Only proposals that meet the mandatory submission requirements will be evaluated. The City may, at its sole discretion, seek clarification from proponents, conduct interviews, or request additional information to support the evaluation process.