

Heritage Valley Town Centre

FILE#: CS230145-SB

HOLDING#: 1012260

LAST UPDATE: July 16, 2025

PROPOSAL SUBMISSION REQUIREMENTS

This package outlines the proposal submission requirements for Heritage Valley Town Centre Affordable Housing listing.

This submission requirements are separated into 5 distinct sections:

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A. APPLICANT QUALIFICATIONS

Tell us more about your organization:

- Organization's mission and history
- Operations and Property Management Experience – Please provide a description that outlines the property management experience, as it relates to affordable housing, of the Applicant or an entity to be retained by the Applicant for the proposed development. Include the following:
 - Name of the property
 - Property address
 - Type of Property (e.g. row house, low rise apartments)
 - Number of units
 - Programs and support services provided, if any (e.g. off-site support services, on-site support services)
 - Number of years of management experience
 - Community engagement and relationship building experience
- * *The Applicant and/or organization that will be the property manager must have five years of management experience in operations and management of similar type and size of properties, as the proposed project.*
- Construction and Development Experience – Please provide written confirmation as to which entity is constructing the development (i.e. the Organization or a contracted builder/ developer in construction) and a list of developments in progress or completed by this entity that are of similar size and scope as the proposed development. Include the following:
 - Name of the property
 - Property address
 - Type of Property (e.g. row house, low rise apartments)
 - Number of housing units
 - Overall budget for the proposed development
 - Year complete
 - Community relationship building experience
 - Demonstration of construction safety practice (quality of construction safety plans on current and past projects)
 - Certificate of Recognition (COR) for meeting the Alberta audit standard for health and safety
- Additional documents to be included: Organization's incorporation, bylaw, and policies documents

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B. PROPOSED DEVELOPMENT

Tell us more about the proposed development:

Description and details of the proposed development, including:

- A detailed schedule of the proposed development timelines including, but not limited to, planning, community engagement / communications plan, financing confirmed, construction tender, building permit issued, development commencement and construction completion, occupancy permits
- * *Proposed development with an earlier construction timeline will rank higher at the evaluation Stage*
- A tentative site plan
- Description of the proposed built form(s) and proposed zoning for the development
 - Built forms may include multi-unit housing or mixed use building – residential units with commercial or community services uses (limited to the ground of the residential building)
 - Built forms must be a minimum of 4 stories in height and no more than 8 stories in height as directed by the Heritage Valley NASP
 - Should align with existing land use zone Medium Scale Residential Zone RM h16.0 within the Edmonton Zoning Bylaw 20001
- Number of units, including breakdown of units per number of bedrooms and bathrooms
 - include the type of units proposed – are these self-contained (living, kitchen, and washroom facilities used exclusively by one household) or shared (living, kitchen and washroom facilities shared by more than one household)?
 - include the breakdown of affordable units, if less than 100% of units in the development are affordable (i.e. mixed market)
 - the minimum number of residential units must be 75
- * *Proposed development providing a 100 units or more will be ranked higher*
- If applicable, description of shared/common facilities for residence of the development
- If applicable, description of community value adds or amenities, such as community garden, etc.
- Describe the environmental / energy efficiencies that will be achieved by the development
 - the development must achieve Tier 2 of the 2020 NECB or Tier 3 of the 2020 NBC
 - large multiple buildings under Part 3 of the National Building code will reference the 2020 NECB, which has 4 Tiers. Low-rise multiple buildings under Part 9 of the National Building Code will reference the 2020 NBC, which has 5 Tiers.
- * *Proposed development providing greater environmental / energy efficiencies will be ranked higher*

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- Describe how the project will meet the National Building Code 2023 – Alberta Edition and also adhere to the accessibility standards of EITHER Option 1 or 2
 - OPTION 1 – 20% of all units within the development must meet or exceed accessibility standards (CSA B651/652 or Rick Hansen Foundation GOLD Accessibility Certification) with access to the project and its common areas being barrier free. OR
 - OPTION 2 – full universal design throughout the entire project (common areas and dwelling units).

C. PROPOSED OPERATIONS MODEL

Tell us more about the proposed operations model:

Description of the proposed operations of the development, including:

- Description to demonstrate the need and demand for the type of housing, which may include, but is not limited to:
 - market study demonstrating the same housing type is needed
 - waiting list for same type of housing
 - vacancy information (i.e. low vacancy rates for affordable housing in the neighbourhood)
- Description of the demographic being served (e.g. individuals, families, seniors, women and children, etc.)
Please specify the numbers of units dedicated to vulnerable populations
- Number of years the development will remain affordable
 - For sale transactions, the minimum requirement is 25 years from the date of the issuance of the last occupancy permit (or equivalent), to a maximum agreement term of 40 years
 - For lease transactions, the term of affordability will be determined by the length of the lease, to a maximum agreement term of 99 years
- * Proposed developments with a longer affordability term will be ranked higher at the evaluation stage*
- What eligibility criteria is proposed for occupants of affordable units?
 - Description of occupant selection (such as self-referred, coordinated intake or referred by others) for the affordable housing units.
 - For co-op developments: are there specifics related to roles and responsibilities of a member (i.e. willingness to live in a communal setting, volunteer requirements, etc.)?

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- Please indicate how your development meets or exceeds the affordability requirements:
 - Rent payments cannot exceed the applicable **City of Edmonton's Maximum Allowable Rental Rates**. At a minimum, 30% of total residential units must have payments that do not exceed 80% of market average rental rates as determined by the City, OR have rent-gear-to-income with payments that do not exceed 30% of the tenant's gross household income;
 - In the case of co-op units, housing charges for affordable housing units cannot exceed the applicable **City of Edmonton's Maximum Allowable Rental Rates**. At a minimum, 30% of total residential units must have payments that do not exceed 80% of average market rental rates.
 - The annual household income of occupants must be below the income threshold limits as set out by the City of Edmonton
- * *Proposed developments with greater affordability will be ranked higher at the evaluation stage*
- What types of programs and services are provided?
 - property management: on-site or scheduled visits (if scheduled visits, indicate frequency of service, e.g. daily, weekly, on-call)
 - on-site / mobile support; full-time or part-time programming
 - service provision (e.g. does housing charge include heat, water, internet services, lawn/snow maintenance, parking, etc.)

D. FINANCIAL INFORMATION

- [Financial Assessment Spreadsheet](#) – Completed copy of the Financial Assessment Spreadsheet New Construction (A) – Planned Development
- Applicant's audited financial statements for the previous three years
 - If the audited financial statement is not available at time of application, a Review Engagement Report may be accepted at the sole discretion of the City during the application stage. The City will require an audited financial statement prior to execution of the Affordable Housing Agreement that is satisfactory to the City.
- Confirmation of equity
 - Proof of 10% of the total cost of the proposed development must be provided by the Applicant as unencumbered equity (i.e. bank statement or a letter from a financial institution), except in special cases as determined by the City of Edmonton

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- Confirmation of other funding sources and/or financing
 - Written proof of each lender or funder's commitment to the proposed development, including the intended funding amounts and any conditions
- Cost estimates
 - Class B Quantity Survey Report or cost consultant certified report which includes forecasted hard, soft, contingency, and land costs. If neither are available at the time of application, a breakdown of forecasted costs provided by a certified architect or engineer may be accepted at the sole discretion of the City

E. ADDITIONAL SUBMISSION TERMS AND CONDITIONS

Cost of Submission of Proposals

The preparation and submission of, and all discussions or other proceedings relating to, a submission will be conducted at the sole cost of the Applicant. The City will not be responsible for any costs incurred by an Applicant in the preparation or submission, including any costs incurred by the Applicant to attend meetings or make presentations relating to its submission, or in any participation of the Applicant in negotiations or finalization of the Sale Agreement and 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, to:

- accept, reject or further negotiate with any or all Applicants;
- amend the scope of the project, modify, cancel or suspend this listing process or any or all stages of the process, at any time, for any reason;
- provide a successful Applicant with capital contributions beyond the land and/or funding contributions described in this listing, if further funding opportunities become available through other City contribution programs or external funding opportunities become available through other orders of government, provided that the City is not required to provide or proffer any such additional contributions to an Applicant;
- re-advertise for new proposals or enter into negotiations for the site, the project or for a project of a similar nature;
- extend, from time to time, any date, time period, or deadline provided for in this listing, upon written notice to all affected Applicants; and
- not enter into a Sale Agreement or Affordable Housing Agreement with any Applicant.

FOR SALE – MEDIUM SCALE AFFORDABLE HOUSING OPPORTUNITY

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No Liability

By applying, the Applicant specifically agrees that it will have absolutely no claim against the City or any of its employees, advisors or representatives for anything resulting from the exercise of any or all of the rights set out in this listing. 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 any claim, or to reimburse or compensate the Applicant in any manner whatsoever, including, without limitation for the costs of preparation of the submission, loss of anticipated profits, loss of opportunity or any other matter.

This listing is only intended to solicit interest and information from potential Applicants, and does not create any legally binding arrangement with the City. This listing is governed by the law applicable to direct commercial negotiations and therefore 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.