

Active in Phase				Evaluation Criteria	Required Documentation From Owner/Developer	Items for Consideration
1: Selection	2: Planning & Development	3: Construction	4: Operations			
				1.1 Capacity of Owner, Operator, Partners and Professionals		
✓				1.1.1 Demonstrated development and management capacity of owner/operator and professional development/ management team throughout all phases of the project (e.g. project vision, site selection, feasibility; project planning, design and financing; construction). Confirmation that all professional team members required	A. Vision	1. Phase 1: Describe the vision for the project and the intended tenant group.
✓					B. Project Summary	2. Phase 1: Describe the proposed project. Indicate the identified target group for the units to be built. Indicate how the project will be developed: under a general contract, as a turnkey development, as a design-build, or using construction management. Provide information on the selected site, including location, current status of ownership and approach to secure site, and overview of approvals required for construction to commence.
✓					C. Summary of recent, relevant projects undertaken by team members	3. Phase 1: What level of experience does your team (owner/operator and other professionals) have with relevant recent projects of similar size and scope? Provide a list of recent relevant projects that specifies the year the project was completed, building address, name of owner/operator, description of building, number of housing units and unit breakdown, specific features, details on any non-residential space in the building with floor area by use, and gross floor area of residential and non-residential space. For each project listed, indicate if there were any specific difficulties encountered and how they were overcome.

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✓				have been selected or process has been developed to select remaining team members.	D. Biographies and resumes of each team member, organizational chart, specific roles of each project member, previous experience working as a team	4. Phase 1: Provide resumes and bios of team members, staff and firms to be involved in the proposed project. Provide an organizational chart for the project team. Indicate the planned role each team member will take for this project and which member will be the project lead. In the case where team members have worked together on previous projects, provide a summary of the project, indicate which team members were involved, and their roles in each project.
✓					E. Process and timing to select remaining required team members, and confirmation all required team members have been added	5. Phase 1: What team members are yet to be selected? Provide information on specific qualifications that will be required of new team members to be added to the project team. How and when will this be undertaken?
✓				1.1.1 Demonstrated development and management capacity of owner/operator and professional development/ management team throughout all phases of the project (e.g. project vision, site selection, feasibility; project planning, design and financing;	F. Financial statements	6. Phase 1: Provide financial statements (audited where available) for the corporation that will develop the project for the past three fiscal years, including all management letters or auditor's letters relevant to that financial statement package. If this is a new corporation, provide information on all affiliated corporations or organizations and provide financial statements for the affiliated companies to demonstrate financial capacity.
✓					G. Financial status	7. Phase 1: Provide a letter signed by the owner of the corporation confirming the corporation and any affiliated corporations or organizations have not previously declared bankruptcy.

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✓				construction). Confirmation that all professional team members required have been selected or process has been developed to select remaining team members.	H. References	8. Phase 1: For the key professionals on the team (Project Manager/Development Consultant, Architect and Developer/Contractor), provide references that indicate the role the project team member undertook, the project value, the date the project was started and completed, full contact information for an individual knowledgeable about the project, and whether the project was completed on time and on budget. References should be for clients from five recent relevant projects undertaken by the project team.
✓				1.1.2 Confirmation of collaborative relationships	A. Outline of role of collaborative relationships, benefits	9. Phase 1: How will the planned collaborative relationships you have arranged help you achieve the project's goals?
✓					B. Letter confirming participation, equity contribution amount and timing for provision of equity	10. Phase 1: Provide a letter from each individual or firm that will contribute equity toward the project that confirms the type of contribution to be made and timing for providing the contribution. If the contribution is to be made in cash, the letter should confirm funds will be available prior to the first advance from the lender. If the contribution is 'in kind', specify how the value of the contribution has been established.
✓					C. Summary of projects completed by others collaborating on project	11. Phase 1: Provide a summary of recent relevant projects undertaken by individuals or organizations in your collaborative relationships, including their role in each project.
✓					D. Information on expectations or requirements of collaborative relationships	12. Phase 1: Have the individuals or organizations involved in collaborative relationships identified any requirements or conditions around their participation? If so, identify the specific requirement or condition to be met.

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✓				1.1.3 Past performance with projects involving Region of Peel	A. List of projects undertaken that involved the Region of Peel as client or funder	13. Phase 1: Provide a list of projects undertaken in the past 10 years that involved the Region of Peel as client or funder of the project. The project information should indicate the role the project team undertook, the project value, the date the project was started and completed, whether the project was completed on time and on budget, and name of the Region of Peel staff member knowledgeable about the project.
✓					B. Signed acknowledgment form from each team member involved in previous projects with Region of Peel	14. Phase 1: Provide a signed form from each team member that was involved with a previous project for the Region of Peel that acknowledges the team member's understanding that the Region of Peel will rely on past performance history of contracts between the team member and/or the team member's firm and the Region of Peel, or contracts between the team member and/or the team member's firm and third parties, and this information may influence the decision.
✓				1.1.4 Confirmation that the proponent meets all of the Region's requirements for organizational structure? (e.g. legally incorporated, letters patent/articles of incorporation and bylaws permit organization to develop proposed project)	A. Articles of Incorporation/Letters Patent	15. Phase 1: Provide a copy of the corporation's Articles of Incorporation/Letters Patent and any Supplementary Letters Patent issued to date. Confirm that the corporation's Articles of Incorporation/Letters Patent permits the corporation to undertake the planned development activity.
✓					B. Bylaws, including borrowing bylaw	16. Phase 1: Provide a copy of all of the corporation's current bylaws including the borrowing bylaw. Confirm the corporation's bylaws permit the corporation to undertake the planned development activity.

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✓					C. Charitable status confirmation	17. Phase 1: Provide written confirmation of the corporation's charitable status, if applicable.
✓				1.1.5 Confirmation of good standing with Province of Ontario, Canada Revenue Agency and municipality	A. Confirmation of good standing form re: Ontario Ministry of Finance and Canada Revenue Agency	18. Phase 1: For Proponents subject to Ontario corporate tax, provide a completed Tax Compliance Declaration Form which confirms the corporation is in full compliance with all Ontario tax statutes, and all returns required to be filed have been filed and all taxes <u>due and payable have been paid.</u>
✓						19. Phase 1: For Proponents subject to Ontario corporate tax, provide a Filing and Balance Confirmation Letter from Canada Revenue Agency confirming tax obligations have been met.
✓					B. Confirmation of good standing letter or tax certificate from municipality	20. Phase 1: Provide a letter or certificate issued by the municipality that confirms all property taxes due have been paid in full as of the last day of the previous calendar month.
✓				1.1.6 Demonstrated management capacity of owner/operator and professional management team throughout operating phase of the project	A. Property management plan	21. Phase 1: Provide your detailed property management plan outlining how the building will be managed once it is completed. If a property management firm has been selected, provide information on how the selection was made and the terms of the agreement. If a property management firm has not yet been selected but will be, provide information on the process to be used, timing for selection of this team member, and intended terms of the agreement. If a property manager has been selected, confirm the individual is and will be a direct employee of the corporation, and provide information on the terms of the arrangement. (only applies to buildings to be owned and operated by proponent)

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✓				1.1.6 Demonstrated management capacity of owner/operator and professional management team throughout operating phase of the project	B. Experience of property manager/ property management firm	22. Phase 1: Provide information on the recent relevant experience of the property manager/property management firm with projects of relevant scope and intended tenant mix. (only applies to projects to be owned and operated by proponent)
✓					C. References for property management firm	23. Phase 1: If a property management firm has been selected, provide three relevant references for the firm. The reference should indicate the role the project team undertook, the project value, the date the project was completed, and full contact information for an individual knowledgeable about the project. (only applies to projects to be owned and operated by proponent)
✓					D. AIR returns for past three years for social housing providers	24. Phase 1: If the proponent is a social housing operator, provide copies of AIR returns for the past three years including responses from the Service Manager on adjustments to be made. (only applies to projects to be owned and operated by proponent)

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				1.2 Market Demand, Evidence of Need		
✓				1.2.1 Selected site location is suitable in terms of demonstrating current and ongoing demand for the housing mix and tenure proposed.	A. Housing Market Analysis Report	25. Phase 1: Provide a Housing Market Analysis report and marketing plan confirming the current and future demand for the project by the intended tenant group(s). This report should include market data (analysis of current vacancy rates, average rents, housing sale prices, existing housing stock and construction starts), demographic data (age, income levels, household size, population growth trends by age), waiting list data (from proponent, referring agencies, partners, municipal or regional waiting lists), information from other sources (municipal reports, Region of Peel reports). The report should compare the planned rent levels/ownership costs to current market levels to confirm marketability of the units. The report should also compare current vacancy rates/sales levels in comparison with other local projects to confirm marketability. The report should clearly identify the intended target group for the proposed project and confirm the current and future housing needs for this target group will be met through the proposed project.
✓				1.2.2 Marketing plan for residential component demonstrates full occupancy is achievable for all proposed units, both	A. Marketing plan for residential space	26. Phase 1: Provide a marketing plan for the residential units in the proposed project. Indicate activities to be completed, tools to be used, which team members will be involved, the timelines for milestones around initial occupancy of the building and how fully occupancy will be maintained throughout the affordability period. If the building has units at different levels of affordability, address how each group of units will be filled and full occupancy maintained. Identify strategies that have been established to address challenges faced in the marketing process.

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✓				is achievable for all proposed units, both current and long-term	B. Confirmation of Required Eligibility Testing for Initial Tenant Selection	27. Phase 1: Provide information on how tenants will be selected for units and any eligibility criteria that will apply. Indicate which team members will be responsible for confirming eligibility of tenants.
✓					C. Confirmation of Required Annual Household Income Reviews	28. Phase 1: If the project involves rental units, what plan is in place for undertaking annual household income reviews? Indicate the team member that will be responsible for this task.
✓				1.2.3 Marketing plan for all non-residential space demonstrates full occupancy is achievable for all proposed spaces, both current and long-term	A. Marketing plan for non-residential space	29. Phase 1: If the project includes non-residential space, provide a full marketing report that contains information on current rent levels charged in similar buildings in the community. Indicate how the space will be used and how it will be marketed to achieve full occupancy. If a tenant/occupant has already been identified, provide a signed letter confirming the terms that have been arranged. Include information on how the use of the non-residential space fulfils the project's vision.

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				1.3 Sustainable Development Plan		
✓				All requirements to achieve development approvals and the issuance of the building permit are in place or underway.	A. Development schedule	30. Phase 1: Provide a development schedule that sets out major milestones (e.g. application for building permit, construction start, financing in place, substantial performance, marketing, turnover). The schedule should include identified risks to the project.
✓					B. Official Plan Amendment required or achieved	31. Phase 1: Confirm whether an Official Plan Amendment is required for municipal or Regional approvals. If an Official Plan Amendment is required, provide information on the nature of the Amendment required for the development, the timing for submitting the application and obtaining approval, what actions have been taken to date, and what actions remain to be completed. Confirm whether or not an OMB appeal has been made and the timeframe for the decision if this is required.
✓					1.3.1 C. Rezoning required or project in compliance	32. Phase 1: Confirm whether rezoning is required for municipal or Regional approvals. If rezoning is required, provide information on the current zoning and required zoning for the development, timing for submitting the application and obtaining approval, what actions have been taken to date, and what actions remain to be completed. If the project involves a change in use of land, building or structure for industrial, commercial, public or institutional purposes, provide a zoning certificate.

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✓				All requirements to achieve development approvals and the issuance of the building permit are in place or underway.	D. Minor variance required or project in compliance	33. Phase 1: Confirm whether a Minor Variance is required for municipal or Regional approvals. If a Minor Variance is required, provide information on the type of Minor Variance(s) required, timing for submitting the application and obtaining approval, what actions have been taken to date, and what actions remain to be completed.
✓					E. Development application review required or completed	34. Phase 1: Confirm if the Development Application Review process has been commenced, what action has been taken to date, and what actions remain to be completed.
✓					F. Heritage approval required or completed	35. Phase 1: Confirm if the project will require Heritage approval. If Heritage approval is required, provide information on the specific approvals required, what actions have been taken to date, and what actions remain to be completed.
✓					G. Servicing confirmation	36. Phase 1: Provide confirmation from the local municipality and the Region of Peel that all required servicing capacity is available for the intended development for gas, water, hydro, sanitary, telephone, cable and fire hydrants.
✓					H. Site Plan Application required or completed	37. Phase 1: Confirm if the Site Plan Application has been submitted for the development, and provide the date the application was submitted. Also provide a status report which indicates what remaining requirements must be met and the expected date for the application to be approved.

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✓				1.3.1 All requirements to achieve development approvals and the issuance of the building permit are in place or underway.	I. Site Plan Agreement issued	38. Phase 1: Confirm the date the Site Plan Agreement was issued. If the Site Plan Agreement has not yet been issued at the time of proposal submission, provide a status update indicating the remaining requirements to be met, and the timing for the Agreement to be issued and executed. If the Site Plan Agreement has been executed, provide a copy of the executed Agreement.
✓					J. Approval by Conservation Authority or Niagara Escarpment Commission required or completed	39. Phase 1: Confirm whether or not the development requires approval from a Conservation Authority or the Niagara Escarpment Commission. If approval from either entity is required, provide confirmation that the development permit application has been submitted, and indicate the status of the application.
✓					K. Railway, transportation agency or utility approval required or completed	40. Phase 1: Confirm whether or not the development requires approval from a Railway, transportation agency or utility. If approval from any of these is required, provide confirmation that the development permit application or request has been submitted, and indicate the status of the application.
✓					L. Building Permit Application submitted	41. Phase 1: Confirm the date the Building Permit Application was submitted. If the Building Permit Application has not yet been submitted, outline the remaining work to be completed and the date the application will be made. Indicate if a single building permit will be issued or if the permits will be issued for phases.
✓					M. Building Permit issued	42. Phase 1: If the Building Permit has been issued, confirm the date the Building Permit was issued and provide a copy. If phased building permits will be issued, provide copies of all available permits.

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✓				All requirements to achieve development approvals and the issuance of the building permit are in place or underway.	N. Phase 1 ESA, Phase 2 ESA if required	43. Phase 1: Provide a Phase 1 ESA report that meets the requirements of Ontario Regulation 153/04 and was completed within the past twelve months, and a completed Canadian Environmental Assessment Act Considerations checklist. If a Phase 2 ESA report was required for the site, provide a copy of that report. Summarize any actions required to be taken for the site to meet site conditions required for municipal approvals to be granted and outline which actions have been completed and any timing for undertaking any remaining work.
✓					O. Record of Site Condition required or completed	44. Phase 1: Confirm if a Record of Site Condition is required for municipal and Regional approvals. If a Record of Site Condition has already been completed, provide documentation confirming the Record of Site Condition has been filed. If a Record of Site Condition is required, provide copies of all Environmental Site Assessment reports completed and the name and qualifications of the individual that will certify the site meets applicable site condition standards and will file to the Environmental Site Registry. If the Record of Site Condition has been submitted to the Environmental Site Registry but is not filed, provide confirmation of the date of submission of material and expected date for response from the Director, Ministry of the Environment and Climate Change.
✓					P. Geotechnical report	45. Phase 1: Provide a copy of the most recently completed geotechnical report for the site. Confirm that the findings of the report have been taken into account in the project's design.

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✓				1.3.1 All requirements to achieve development approvals and the issuance of the building permit are in place or underway	Q. Traffic study, parking study	46. Phase 1: Confirm if the municipality requires a traffic study and/or a parking study. If these studies are required, provide a copy of the completed study or provide information on the firm selected to prepare the study and the timeline for completion.
✓					R. Noise, vibration study	47. Phase 1: Confirm if the municipality requires a noise study and/or a vibration study. If these studies are required, provide a copy of the completed study or provide information on the firm selected to prepare the study and the timeline for completion.
✓					S. Stormwater management plan	48. Phase 1: Provide a stormwater management plan that meets the requirements of all bodies with authority over the site. Provide confirmation of acceptance of the plan by any body with authority over the site. If the plan has not yet been finalized, provide details on the firm that will prepare the plan and timeline for completion.
✓					T. Wind study	49. Phase 1: Confirm if the municipality requires a wind study. If this study is required, provide a copy of the completed study or provide information on the firm selected to prepare the study and the timeline for completion.
✓					U. Shadow Study	50. Phase 1: Confirm if the municipality requires a shadow study. If this study is required, provide a copy of the completed study or provide information on the firm selected to prepare the study and the timeline for completion.
✓					V. Tree Survey	51. Phase 1: Confirm if the municipality requires a tree survey or arborist's study. If this study is required, provide a copy of the completed study or provide information on the firm selected to prepare the study and the timeline for completion.

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✓				1.3.1 All requirements to achieve development approvals and the issuance of the building permit are in place or underway	W. Green Development Standards	52. Phase 1: Provide written confirmation from the municipality that the project's design meets all local environmental design standards (e.g. Sustainable Community Design Guidelines for Brampton, Green Development Standards for Mississauga). If this confirmation is not available at the time of proposal submission, provide information on the timeframe for confirmation.
✓					X. Local Development Standards	53. Phase 1: Confirm if the property is located within the boundary of a specific area with Built Form Standards or Design Guidelines in place. Confirm if all of the applicable standards have been met during the project's design.
✓				Region of Peel Design Standards are met based on design and drawings		54. Phase 1: Describe the building's structure (number of storeys, combustible or non-combustible).
✓						55. Phase 1: Describe the building envelope system.
✓						56. Phase 1: Describe the type of roof system.
✓						57. Phase 1: Describe the HVAC system. Include information on where equipment will be located, the type of metering system that will be installed, which areas will be separately metered and whether or not tenants will be responsible for their energy costs.
✓						58. Phase 1: Describe the exhaust fan system.
✓						59. Phase 1: Describe the life safety system.
✓						50. Phase 1: Describe which Crime Prevention Through Environmental Design principles have been included in the building and property.

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✓				1.3.2 Region of Peel Design Standards are met based on design and drawings	A. Peel Affordable Housing Design Standards	61. Phase 1: Describe the elevator system, if applicable, including the cab size and hoist type. What system has been included for emergency use by firefighters and emergency communication? What accessibility features have been included?
✓						62. Phase 1: Describe the acoustical wall system.
✓						63. Phase 1: Describe how electricity use will be metered for common areas and units and the type of meters that will be installed. State whether or not tenants will be responsible for electricity costs for their units.
✓						64. Phase 1: Describe the parking plan for the property, including the number of spaces, size and location of accessible spaces, and path of travel for pedestrians and vehicles.
✓						65. Phase 1: Describe water conservation measures that will be included in the building and site.
✓						66. Phase 1: Describe how water use will be metered for common areas and units and the type of meters that will be installed. State whether or not tenants will be responsible for water costs for their units.
✓						67. Phase 1: Describe the energy conservation measures that will be included in the building and the site.
✓						68. Phase 1: Describe the impact of the building upon neighbouring properties in terms of shadows and vehicular access.
✓						69. Phase 1: Describe the landscaping plan and the type of materials selected. What principals were followed in the selection of landscaping materials? Will the plan achieve reductions in maintenance and use of resources?

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✓				Region of Peel Design Standards are met based on design and drawings		70. Phase 1: Describe how outdoor recreation spaces will be used, and by which tenants. Include information on accessibility features that will be included.
✓						71. Phase 1: What kind of storm water management system will be used, and how will this benefit the environment?
✓						72. Phase 1: Describe the type of windows to be installed in common areas and units, including components that will achieve energy efficiency and/or sound attenuation. Provide details on how the windows are operated and locked.
✓						73. Phase 1: Describe the layout of the building's main entrance and lobby, including the type of doors, door hardware accessibility features, security features and equipment.
✓						74. Phase 1: Describe the layout of the building's secondary entrances, including the type of doors, door hardware, accessibility features, security features and equipment.
✓						75. Phase 1: Describe the unit doors, including size and accessibility features for doors within the unit and unit entrance doors. Indicate which doors have door opening devices installed or where rough-ins are provided.
✓						76. Phase 1: Describe the type of door hardware to be installed on unit entrance doors and doors within the unit.
✓						77. Phase 1: Describe the type of doors that will provide access to each of the common areas within the building, including information on size, door hardware and accessibility features.

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✓				1.3.2 Region of Peel Design Standards are met based on design and drawings	A. Peel Affordable Housing Design Standards	78. Phase 1: Provide a signage plan for exterior and interior signage and wayfinding. Include information on the location of signage and accessibility features such as character size and incorporation of braille symbols.
✓						79. Phase 1: Provide details on the waste handling and recycling system, including information on each room size and equipment to be installed. If the building includes garbage chutes, provide details on the type of door, accessibility features, room size and how the chute is operated.
✓						80. Phase 1: Provide details on the size and layout of corridors and elevator lobby areas throughout the building. Indicate the type of finishes to be provided. Indicate the turning radius provided at elevator lobbies, within corridors and at the end of corridors. If handrails are provided, indicate the location of the handrails on each floor and the type of material to be used.
✓						81. Phase 1: Provide information on common stairways and exits including accessibility features.
✓						82. Phase 1: Provide information on any exterior or interior ramp including type and height of handrails, length, slope, width and provision of platforms.
✓						83. Phase 1: Provide information on building security systems and how these will be monitored.
✓						84. Phase 1: Does the building include a moving room for tenants? If so, provide information on the location in relationship to the elevator and outdoor access for offloading vehicles.

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✓				Region of Peel Design Standards are met based on design and drawings		85. Phase 1: Describe amenity space in the building, including the location of each space, how the room will be used, size, and any special equipment that will be included. For each room, confirm whether or not a turning radius of 1500m has been provided. Explain how the type and size of amenity space in the building meets the needs of the intended tenant group.
✓						86. Phase 1: Provide information on the plan for bicycle storage. If there is a dedicated space, provide information on the size of the space, how many bicycles can be accommodated, and how tenants will access the room and travel to the outside.
✓						87. Phase 1: Provide information on the plan for scooter storage and charging. If there is a dedicated space, provide information on the size of the space, room layout including location of electrical outlets for recharging, how many scooters can be accommodated, and how tenants will access the room and travel to the outside.
✓						88. Phase 1: Provide information on the location and access to mailboxes, including the height of the top and bottom mailboxes and access by Canada Post.
✓						89. Phase 1: Provide information on interior and exterior storage rooms including the size, location and how access will be controlled.
✓						90. Phase 1: Provide information on washrooms to be located in corridors or areas accessed by the public. Include details on the room size, equipment and accessibility features such as the turning radius provided, provision of door opening devices, wheel under sinks, size of transfer space beside the toilet and provision of an adult-sized change table.

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✓				1.3.2 Region of Peel Design Standards are met based on design and drawings A. Peel Affordable Housing Design Standards	91. Phase 1: Provide details on common area furniture and window coverings to be included in the building.	
✓					92. Phase 1: Provide details on the plan for laundry equipment in the building. If there will be a common laundry room, provide the layout and information on the room size and equipment to be provided. Confirm if a wheelchair turning radius has been provided. Confirm the height of counters and work surfaces. If the units will have laundry hook-ups, provide information on the configuration of equipment that will be provided or if the tenants are responsible for providing their own equipment.	
✓					93. Phase 1: Provide the height at which controls will be installed, such as light switches, electrical outlets, heating/cooling controls in amenity rooms, enterphone controls and fire alarm pulls.	
✓					94. Phase 1: Provide a schedule for finishes for all common areas and corridors, as well as spaces dedicated for staff use. This schedule should provide information on the type of flooring, wall finishes and ceiling finishes.	
✓					95. Phase 1: Provide a schedule for finishes for all units that indicates the type of flooring, wall finishes and ceiling finishes in each room.	
✓					96. Phase 1: Provide a schedule for light fixtures throughout the exterior space, common areas and units showing the location, type of fixture and illumination level. Indicate which light fixtures include motion-sensor activation.	
✓					97. Phase 1: How does the planned level of finishes achieve long-term operational efficiencies?	

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✓						99. Phase 1: For units designed as universally accessible, modifiable or fully barrier free, provide information on the type of modifications to be provided in each unit type for washrooms. This list should include the type of faucet, whether a wheel-under sink is provided, the size of bathtub or shower and if the shower is wheel-in, size of transfer space beside the toilet, location of grab bars, type of flooring and size of turning radius provided.
✓						100. Phase 1: For units designed as universally accessible, modifiable or fully barrier free, provide information on the type of modifications to be provided in each unit type for bedrooms including height of closet rods and shelving, type of flooring and overall room size.
✓						101. Phase 1: For units designed as universally accessible, modifiable or fully barrier free, provide information on the type of modifications to be provided in each unit type for entrances including provision of closets and height of closet rods and shelving, turning radius inside unit door, height of door peepholes, and width of space adjacent to unit door on both sides.

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✓				1.3.2 Region of Peel Design Standards are met based on design and drawings	B. Accessibility Standards	102. Phase 1: For units designed as universally accessible, modifiable or fully barrier free, provide information on the type of modifications to be provided in each unit type for balconies or patios, including the size of the space, width of door providing access.
✓						103. Phase 1: For units designed as universally accessible, modifiable or fully barrier free, provide information on the height of heating/cooling controls, light switches, electrical outlets, Enterphone system and any other controls.
✓						104. Phase 1: For units designed as universally accessible, modifiable or fully barrier free, provide information on the height of the windows in each room, how each window is operated, and how the window locks are operated.
✓						105. Phase 1: For units designed as universally accessible, modifiable or fully barrier free, provide information on the width of corridors inside the unit.
✓				1.3.3 Proponent has control of site	A. Ownership, control of site	107. Phase 1: Provide confirmation in the form of a title search report obtained within the past twelve months that the site is owned with no liens or encumbrances registered on title except those that will be permitted under the funding Agreement. If the site is not yet owned by the proponent, provide a fully executed Agreement of Purchase and Sale including all appendices and schedules.
✓					A. Preparing for services and turnover	108. Phase 1: As defined in the RFP document, outline the plan to prepare for the initial operation of the building.

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1: Selection	2: Planning & Development	3: Construction	4: Operations			
✓				1.3.4 Process to handle transition from construction phase to occupancy phase has been prepared	B. Project Close-Out Plan with contractor/builder	109. Phase 1: As defined in the RFP document, outline the project close-out plan with the contractor/builder in the following areas: process to sign off on fully completed units and common area spaces; installation of all required signage; transfer of keys from contractor/builder to owner; notification of utilities of take-over date; confirmation of municipal address and contact information for owner; transfer of surplus building materials; and transfer of construction records and warranties.
				1.4 Financially Viable Plan		
✓				1.4.1 Identified capital costs are reasonable and comprehensive for a development of this type. All complexities have been addressed.	A. Pro forma for capital costs	110. Phase 1: Provide a detailed capital cost pro forma for all costs up to conversion to permanent financing.
✓					B. Market site appraisal	111. Phase 1: Provide a current market appraisal for the site prepared by an Appraisal Institute of Canada-designated appraiser.
✓					C. Pro forma assumptions	112. Phase 1: Provide information on the assumptions for each cost identified in the capital cost pro forma that outlines the assumptions for determining the capital cost.
✓				Cash flow schedule for pre-development and development is appropriate and achievable.	A. Cash flow schedule	113. Phase 1: Provide a cash flow schedule showing all capital costs and contributions to the end of the construction phase on a monthly basis.
✓					B. Cash flow assumptions	114. Phase 1: Provide information on the assumptions for each cash flow expense and contribution outlining how the expense or contribution was determined.

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✓				1.4.2 Cash flow schedule for pre-development and development is appropriate and achievable.	C. Sources of Funds, confirmation from municipality	115. Phase 1: What incentives have been confirmed or will be requested from the municipality or the Region for the capital phase? Provide a letter from the local municipality outlining all confirmations received to date and all requirements to be met for all sources of incentives identified as capital contributions. Provide confirmation of all other contributions noted in the capital pro forma (i.e. confirmation the project is eligible for HST rebates shown, equity contributions in the form of cash or in kind). If there is a plan to request incentives, but the contribution is not yet confirmed, what plan is in place to obtain funds to cover the anticipated incentive to be requested?
✓				1.4.3 Required financing for the development phase has been secured.	A. Documentation from lender confirms financing in place for development phase	116. Phase 1: Provide confirmation that the proposed project is eligible for all required construction financing. This confirmation should include the equity contribution requirements and other conditions required to be met by the lender, and financing terms including requirement for CMHC mortgage loan insurance if applicable. Provide a term sheet, if available.
✓				1.4.4 Fundraising plan, if included as source of funds, is viable and timing is achievable.	A. Fundraising plan	117. Phase 1: Does the project include capital or operating funds to be raised through fundraising? If a fundraising component is planned, provide a fundraising plan that identifies the corporation's previous successes with fundraising, amount of funds raised to date, target for raising additional required funds, the detailed plan to achieve the goal and what action will be taken if the goal is not met.

Selection

Active in Phase				Evaluation Criteria	Required Documentation From Owner/Developer	Items for Consideration
1: Selection	2: Planning & Development	3: Construction	4: Operations			
✓				1.4.5 The project is financially sustainable during the operating phase (to the end of the 20 year affordability period).	A. Multi-year operating budget covering period to end of affordability period	118. Phase 1: Provide an operating budget for the first 20 years of operations.
✓					B. Assumptions for each revenue source and operating cost, analysis of Debt Service Coverage Ratio, mortgage terms	119. Phase 1: Provide detailed assumptions for each revenue/cost source identified and escalation rates during the 20-year period. The operating budget should also identify the Debt Service Coverage Ratio, take-out interest rate and term, and length of amortization.
✓					C. Interest rate sensitivity analysis	120. Phase 1: What is the plan for addressing potential interest rate increases at the end of the first mortgage term?
✓					D. Confirmation of municipal/Regional contributions or incentives during operations	121. Phase 1: What incentives have been confirmed or will be requested from the municipality or the Region for the operating phase? Provide a letter outlining all confirmations received to date and all requirements to be met for all sources of incentives identified as operating revenue or operating expense reductions.
✓					E. Confirmation of eligibility for HST rebates during operations	122. Phase 1: Will the project be eligible for HST rebates during operations? Provide confirmation that demonstrates any HST rebates included in the operating budget will be realized.

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✓				1.4.6 Non-shelter components are financially viable	A. Detailed list of non-shelter components including size, revenue during operations	123. Phase 1: Does the project include any non-shelter components? If yes, describe the size and capital cost of the space or other characteristics (i.e. retail space, income from rooftop antenna)? What revenue will be associated with this space? Please provide a third party market assessment that confirms the revenue source and amount. What plan is in place to address any complexity from including this space in the project? (i.e. impact on charitable or non-profit status, challenge to financing, strata agreement for condominium ownership). Provide documentation that confirms the revenue source and funds to be generated during operations (i.e. letter of intent from tenant). If the anticipated revenue is not achieved, what plan is in place to cover the shortfall?
				1.4.7 Owner has capacity to secure all required financing.	A. Documentation from lender confirms financing in place for operating phase	124. Phase 1: Provide information on steps taken to date and remaining action to obtain all required operating financing. This may be in the form of a lender's letter that sets out conditions and requirements that must be met, and financing terms. Include a term sheet if available.
✓				1.4.8 Internal subsidy plan is realistic.	A. Plan to provide internal subsidies	125. Phase 1: Does the project involve any internal subsidies or varying rent or purchase cost levels that would benefit lower income households? If yes, describe how that program will work, the benefits to be achieved by lower income households, and how this will be communicated to all residents.
✓				1.4.9 Rent levels include utilities as required by program.	A. Confirmation that rents include required utilities	126. Phase 1: Confirm the arrangement for payment of utilities by tenants. Which utilities are/are not included in rent? If the tenant pays a utility directly, is there a plan to provide a reduction in monthly rent, and how is that reduction calculated? (applies only to rental projects)

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✓				1.4.10 Project's long-term asset management plan addresses capital cost requirements during operations.	A. Asset management plan	127. Phase 1: Have you considered developing a long-term asset management plan? How will operating profits be used throughout the affordability period? How will the project meet ongoing capital repair costs? What rationale has been used to determine annual contributions to the Capital Reserve Fund?
				2.1 Mitigate Risk to Region		
✓				Requirements that protect/secure the rights of the Region are in place.	A. Confirmation of bonding	128. Phase 1: Provide a pre-qualification letter from a bonding company (aka a Surety) that confirms the contractor/developer can obtain the bonding levels required by the Region of Peel contribution or loan agreement. The letter should confirm that the bonding company agrees to include a Multiple Obligee Rider naming the proponent and the Region as obligees in the performance bond, when issued.

Active in Phase				Evaluation Criteria	Required Documentation From Owner/Developer	Items for Consideration
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✓				2.1.1 Requirements that protect/secure the rights of the Region are in place.	B. Confirmation of insurance	129. Phase 1: Provide a letter from the Proponent's Insurance broker or agent confirming they have reviewed the proposal and provided the Proponent with information as to the estimated cost of the insurance for all phases of the project, to facilitate the Proponent's budgeting. If the Proponent has a developer or contractor assisting with the proposal, provide a letter from the insurance broker/agent for the developer/contractor affirming they have reviewed the Proposal and provided the developer/contractor with cost estimates for the insurance during the construction phase.
✓					C. WSIB eligibility certificate confirming contractor or developer has WSIB coverage, or suitable alternative plan is in place	130. Phase 1: Provide a current WSIB eligibility certificate confirming the contractor/developer is eligible and has WSIB coverage. If the contractor or developer is not able to meet WSIB confirmation requirements, explain how these will be met.
✓					D. Signed confirmation from proponent accepting terms of Contribution Agreement	131. Phase 1: As part of the submission, include a signed form confirming the proponent has reviewed and is in agreement with all terms in the Contribution Agreement. If there are clauses in the Contribution Agreement that the proponent wishes to be revised, these are to be identified and the reason for requesting the revision noted.

Active in Phase				Evaluation Criteria	Required Documentation From Owner/Developer	Items for Consideration
1: Selection	2: Planning & Development	3: Construction	4: Operations			
✓				2.1.2 Risk Management Plan addresses identified risks. Given the project's level of complexity, identify the level of oversight required from the Region.	A. Risk Management Plan	137. Phase 1: Provide a Risk Management Plan that identifies potential and existing risks to the project's successful completion for each development stage and indicate how each identified potential or existing risk will be mitigated. This Plan should include, but not be limited to, an assessment of risks related to securing the site, environmental remediation, development approvals, scheduling, securing financing, inclusion of innovative components or programs, generating full operating revenue at project completion, and increases in operating expenses.
✓				2.1.3 Proponent has the capacity required to successfully address potential cost overruns.	A. (Financial Statements)	138. Phase 1: Provide details on your capacity and approach to cover cost overruns and schedule extension? What strategies will be used to mitigate these risks?
✓					B. Process to control cost overruns	139. Phase 1: Confirm the arrangement in place with the contractor/developer to ensure the project will be completed on time and on budget.

Active in Phase				Evaluation Criteria	Required Documentation From Owner/Developer	Items for Consideration
1: Selection	2: Planning & Development	3: Construction	4: Operations			
✓				2.1.4 Requirement for short term financing including revolving loan fund/bridge loan.	A. Confirmation of Bridge Loan, Revolving Loan or Other Short-Term Financing Required	141. Phase 1: Does the project require bridge financing, a revolving loan or short-term financing? What is the source of this financing (e.g. private financing, bridge loan from lender, other) mechanism, and what confirmation is in place around the terms?
✓				2.1.5 Strategies identified by Region of Peel to mitigate risk if government program is suspended.	A. (Cash flow schedule and Cash Flow Assumptions)	142. Phase 1: (Review cash flow schedule already provided to identify timing for funding)
✓				2.1.6 Oversight for requesting and disbursing capital funds is in place	A. Process for recording costs, requesting funds and disbursing capital advances	143. Phase 1: Describe the process to be used for requesting funds/construction financing and disbursing funds received. What controls will be in place to confirm project funds are used for eligible project costs?
✓				2.1.7 Process is in place to manage changes in construction budget	A. Approval process for monitoring construction, approving change orders and monitoring construction budget	144. Phase 1: Describe the process to be used for monitoring construction, approving change orders and monitoring the project's construction budget and funds required to complete the project. Which team members will be involved in this process? What process for establishing authorization levels for change order approvals will be implemented?

Active in Phase				Evaluation Criteria	Required Documentation From Owner/Developer	Items for Consideration
1: Selection	2: Planning & Development	3: Construction	4: Operations			
✓				2.1.8 Organization has management policies in place	A. Management policies	145. Phase 1: Provide a description of the corporation's management policies in the areas of spending/financing controls; expense guidelines for staff and Board members; maintenance and service standards; arrears/non-payment (for rental projects); use of common areas; resident involvement; emergency preparation; and risk management.
				2.2 Timeline and Schedule		
✓				2.2.2 Confirm the proponent's schedule for funding matches the timing program funding is available to the Region of Peel. Confirm the cash flow schedule reflects the Region of Peel's policy on retaining holdback.	A. (Cash flow schedule and Cash Flow Assumptions)	147. Phase 1: Is cash flow schedule realistic and can Peel set up advances based on the schedule?
				2.3 Return on Investment including SROI		
✓				2.3.1 What is the Social Return on Investment to Peel for every funding dollar spent?	A. Level of funding per funded unit requested from Region of Peel	148. Phase 1: Provide information on the level of funding per funded unit requested from the Region for both capital and operating components and the level of affordability compared to market rents/ownership costs.

Active in Phase				Evaluation Criteria	Required Documentation From Owner/Developer	Items for Consideration
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✓				2.3.1 What is the Social Return on Investment to Peel for every funding dollar spent?	B. Data confirming social return on investment	149. Phase 1: Provide information relevant to the Social Return on Investment for funding provided by the Region of Peel. (Wording to be finalized, but may include the following: details on the benefits of affordable home ownership vs. rental tenure, benefit to reducing risk of homelessness for individuals and families currently at risk, providing seniors with housing that promotes aging at home, employment opportunities generated through the project, impact of receipt of rent supplement funding on affordability, etc.)
✓				2.3.2 What is the level required for Regional oversight during the design and development, construction and operations phase?	A. Confirmation project will meet requirements of Contribution Agreement	150. Phase 1: Confirm the project will meet all requirements set out in the Contribution Agreement during the planning and development and construction phases and the operating phase.
✓					B. Role of Region During Each Phase	151. Phase 1: Describe the role of the Region of Peel during the planning and development phase, during the construction phase, and during the operating phase.
✓				2.3.3 Does the affordability period offered meet or exceed minimum program requirements?	A. Confirmation of affordability period	152. Phase 1: Confirm the minimum and maximum affordability period offered for the funding requested.

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				2.4 Transparent		
✓				2.4.1	Conflict of Interest	A. Conflict of Interest Declaration 153. Phase 1: Each key team member (i.e. owner/operator or President of Board of Directors, Project Manager/Development Consultant, Architect and Developer/Contractor) is to complete and sign the attached Conflict of Interest Declaration. If the project team includes any team members involved with other submissions under this proposal call, indicate how the team has addressed this potential conflict of interest.
✓				2.4.2	Council is fully informed of the outcome of the evaluations of submissions to requests for proposals	n/a 154. Phase 1: n/a (back office review for Peel) Through reports to Council, confirm that process was fair and transparent.
				3.1 Safe, Active and Inclusive Communities		
✓				3.1.1	The project encourages Active Living	A. Plan to encourage active living 155. Phase 1: What is included in the building's interior and exterior design and location to encourage residents to have an active living lifestyle? How does this relate to the needs identified in the Housing Need and Demand plan?
✓				3.1.2	The project has a community engagement plan that will generate support and address concerns.	A. Community Engagement Plan 156. Phase 1: Provide a community engagement plan that demonstrates: how the project will build support among decision-makers, build active community support, address possible community concerns, protect and exercise the legal rights of stakeholders and respond to the media.
						157. Phase 1: What consultation has taken place with elected officials in the municipality and the Region to seek endorsement?

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✓				3.1.3 The project will create a complete community and engage residents in the building and greater community.	A Plan for inclusive community	158. Phase 1: Indicate how the local community will benefit from the planned development. This may include opportunities to access community space in the building or participate in programs offered to residents.
✓						159. Phase 1: How will the residents of the building be encouraged to engage in the greater community?
✓				3.1.3 The project will create a complete community and engage residents in the building and greater community		160. Phase 1: How will the project bring together individuals of different abilities and backgrounds?
				3.2 Quality Benefits for Community and Tenants		
✓				3.2.1 The type and size of amenity space in the building and on the grounds fully meets the needs of the intended tenant group.	A. Plan for amenity space	161. Phase 1: Provide information on how the planned amenity space will be used. If this space is intended to generate revenue, indicate the source and how the space will be shared between inside community groups, groups from outside the building and tenants.
✓					A. Description of innovative components selected	162. Phase 1: What innovative components are included in the project, and how do these innovations contribute to a better project?
✓						163. Phase 1: If applicable, provide a Support Program Plan that identifies any support programs required by the intended tenant group and describes in detail how these needs will be met.

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✓				3.2.3 What partnerships, if any, are proposed to provide support services to tenants in the building; is funding committed?	A. Support Program Plan	164. Phase 1: If applicable, provide a letter from the agency that will deliver the supports that confirms all required funding is in place for the Support Program Plan.
✓					A. Support Program Plan	165. Phase 1: If applicable, how will community capacity be enhanced through the Support Program?
✓					A. Support Program Plan	166. Phase 1: If applicable, if the project will house persons with physical or cognitive disabilities who will receive supports and would need assistance with evacuation, have the requirements for a "Care Occupancy" status been met, if this designation may be applied by the local Fire Department for all or some of the units?
✓				3.2.4 Plan for initial occupancy by tenants has been prepared.	A. Resident communications and support plan during initial occupancy	167. Phase 1: Outline the plan to prepare for initial tenants of the building. This plan should include how the organization will communicate with future residents during construction, how the move-in of tenants will be staged, supporting tenants and maintenance requests, providing information about the building and community to new tenants, addressing deficiencies and creating community within the building.
✓				3.2.5 An tenant satisfaction survey will be completed on a regular basis during the affordability period to confirm the building and unit are meeting the needs of the tenants.	A. Plan for Quality Improvement and tenant Satisfaction Survey	168. Phase 1: Describe your plan for quality improvement and tenant satisfaction during the operating phase.

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				3.3 Region of Peel Strategic Plan Alignment		
✓				3.3.1 The project's vision is in keeping with the Region's and municipality's program delivery framework, targets and priorities. (e.g. transit availability, proximity to amenities and employment opportunities, intensification and infill developments, promoting walkability and healthy living)	A. Owner's identified project goals and objectives reflect those of the Region and municipality.	169. Phase 1: As defined in the RFP, how does the project meet the local municipality's goals and priorities?
✓						170. Phase 1: As defined in the RFP, summarize how the project meets each of the Region's program delivery framework, targets and priorities.
✓						171. Phase 1: Provide a map that shows the site location and the location of services in the existing neighbourhood such as public transportation, elementary and secondary schools, banking, grocery stores, places of worship, recreation centres, parks, pharmacies and doctor's offices that will meet the needs of the intended residents.
✓						172. Phase 1: If the project includes acquisition and rehabilitation of an existing rental building, provide confirmation that the completion of the project will achieve the Region's goal to retain and add new rental housing stock, and how will the existing residents be accommodated.
✓						173. Phase 1: If the project includes a homeownership component, describe any programs that will be provided to educate future homeowners.

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✓				3.3.2 The project will ensure all local rules set out in the Contribution Agreement and amended by the Region of Peel are followed.		174. Phase 1: Confirm your awareness of local rules established by the Region of Peel for this funding program and provide written confirmation that the project will fully comply with all current requirements for tenant selection as they exist today and all requirements as issued by the Region of Peel throughout the affordability period.