



# Application Checklist

## Affordable Housing Partnership Program

### General Information

The Application Checklist outlines the minimum documentation applicants **may be requested** to submit as part of their submission to the Affordable Housing Partnership Program. Applications are reviewed for project readiness, program eligibility and completion.

Applications missing any of the mandatory information and minimum documentation may be delayed or withdrawn from consideration. The Ministry of Alberta Seniors, Community and Social Services at its discretion may request additional documentation as required to complete its assessment of a project proposal. *The information required for evaluation is not limited to this checklist. The Ministry of Alberta Seniors, Community and Social Services reserves the right to request further clarification and additional documentation.*

Please check and date this checklist and submit with all declared documentation. Applications and all supporting documents are to be submitted through the Online Affordable Housing Partnership Program Form. Requested documentation are to be submitted to [SCSS.housingpartnerships@gov.ab.ca](mailto:SCSS.housingpartnerships@gov.ab.ca).

Disclaimer: Alberta Seniors, Community and Social Services is a public body subject to the *Freedom of Information and Protection of Privacy (FOIP) Act*. Records in the Ministry's custody and control may be subject to a request for access to information under the Act. By submitting an application form to Alberta Seniors, Community and Social Services, the applicant acknowledges and agrees to the sharing of information collected from the applicant with the Canada Mortgage and Housing Corporation (CMHC) and other Government of Alberta departments. Applicants are strongly advised to consult their own legal advisors as to the appropriate way in which confidential or proprietary business information should be identified in their applications.

### Mandatory Information

#### Application Form

Completed Online Affordable Housing Partnership Program Application Form.

**OR**

National Housing Co-Investment Fund or Rapid Housing Initiative Application from Canada Mortgage and Housing Corporation. Additional information specific to the Affordable Housing Partnership Program will be requested.

#### Project Details

- Provide a minimum number of five net new affordable housing units.
- Demonstrates capacity to develop, deliver and operate proposed housing project.
- If completed, provide needs assessment to demonstrate alignment with municipality.
- Demonstrates commitment that affordable housing units will remain for a minimum of 20 years.
- Demonstrates funding is in place for any planned onsite social or mental health support workers.

#### Financial Viability

Be financially viable and sustainable. Applications for funding for seniors' lodges, supportive housing, and shelters can identify operating funding support sources, such as Lodge Assistance Program funding or other approved funding from other provincial ministries to demonstrate the project is sustainable from an operational perspective, where applicable.

- Require no more than 1/3 provincial contribution for total cost of the project. This contribution could be in the form of capital grant, a capital contribution in the form of a request to transfer the ownership of an ASHC-owned land and/or building, or a long-term lease of an ASHC-owned asset.
- Demonstrates project has support from other sources:
  - Identification of co-funders, source, and use of funds: a list of all co-funders, and all of the documents listed below, as applicable:
    - Capital Funding: letter or other documentation supporting all sources of financing, including grants, in-kind, forgivable loans, and waiver of development charges and fees (as applicable);
    - Operational Funding: letter or other documentation for all sources of operational funding support (e.g., rent supplement, operating subsidy, property tax waiver etc.); and
    - For operational funding arrangement not available for full term of the target affordability period, provide a working plan on how the project will remain viable.

Understanding that funding can be contingent on Government of Alberta support, documents can be preliminary and include estimates or ranges with the understanding that fully executed agreements must be received prior to issuance of agreement by Government of Alberta.
- Applicant provides a minimum equity contribution of 10 per cent of the total development cost toward the project, and identify at least one capital partner providing additional equity to the project at a minimum of 5 per cent. Equity contributions can be in the form of land, cash or other assets.
- Applicant provides clear rental bands. Project has a minimum of 10 per cent of the housing units at minimum rent and a maximum of 30 per cent of the units at market and near-market rent (reference guidelines for further clarification).
- Applicant is aware that, if their application is successful, the applicant will be referred to as Recipient in the AHPP Capital Grant Agreement and will be responsible for all costs of the project including any cost overruns, if necessary.

### Ownership

- Company ownership documents: all the documents listed below, as applicable (not required for Housing Management Bodies):
  - Articles of incorporation including all supporting documentation, such as, but not limited to: a business name registration, articles of organization, etc.;
  - Operating Agreements;
  - Detailed information about the entity's ownership structure indicating percentage of ownership (if applicable); and
  - Organizational chart outlining the names of all related shareholders, subsidiaries, key responsibilities, and the entity's corporate or reporting structures.

### Preferential Documents

#### Financial Viability

- Cost estimates for the project:
  - A Class A or Class B cost estimate from a certified cost consultant; and
  - At a minimum a breakdown of forecasted costs.
- With the exception being Housing Management Bodies incorporated under the Alberta Housing Act, applicants **may be requested** to submit three (3) years of financial statements or an acceptable alternative (new entities). Including the following as applicable:
  - Audited financial statements for the most recent 3 years for the applicant(s) and for each Guarantor(s) (if applicable);
  - If audited financial statements are not available, notice to readers/engagement reviews prepared by a Chartered Professional Accountant for its previous 3 years (or such lesser period as the Applicant has been operating) that include the following information:
    - Balance Sheet;
    - Income Statement;
    - Statement of Cash Flows; and
    - Notes to the Financial Statements.

- In the event that applicants have formed a joint entity, organizations forming the joint entity **may be requested** to submit their financial records.

## Ownership

- Confirmation that land is secured:

If the land is a recent or upcoming purchase/lease:

- Copy of purchase and sale agreement. This document should outline the purchase price of the property, the name of the buyer and seller, the closing date, and any relevant selling details;
- A letter from the province or the city/municipality confirming the land is available and being provided to the applicant for use; and
- Copy of all lease agreements (if applicable). For example, operating leases, land leases, subleases, headleases, etc.

If the land is already owned:

- The land title; or
- A recent property tax statement.

- Company ownership documents: if the proposal proceeds to the evaluation stage, applicants **may be requested** to submit the following documentation as part of their submission (Not required for Housing Management Bodies):

- Letters, Patent, Bylaws, and any applicable shareholders' agreements; and
- The name and relationship of all registered and beneficial owners of the property (if applicable).

## Project Details

- Where land is secured, approved zoning:

- Where available, documentation outlining the zoning that has been approved by the municipality. The approved zoning must support the proposed development, not the existing use.

- Proof of development permit:

- Where available, documentation outlining the development permit that has been approved by the municipality.

- Completion of the design:

- Preliminary plans and specifications outlining: the number of suites, suite layout, building amenities, non-residential space specifications, square footage, elevations, etc.

- Plan for or results from a community engagement process:

- Community engagement plan documentation outlining a detailed list of planned activities, timelines and outreach strategies. If community engagement has already occurred, then documentation outlining the results.

- A project schedule:

- Documentation outlining a general overview of the proposed development, including the timeline, project tasks and dependencies.

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Date Completed (dd/mm/yyyy)