

A photograph of a laptop on a desk with a cardboard house cutout in the foreground. The house cutout is a simple silhouette with a chimney and several rectangular windows. The background is a blurred office setting with a window and a blue object.

Affordable Housing Initiative Concierge Program and Developers Tools

Presented by: Julie Scarcella, Mike Vance
November 2023

Who Are We

A consortium of private & public sector subject matter affordable housing experts to include policy, development, planning, building science, finance, project management, construction, sustainability (Net Zero and Passive House, LEEDv4.1 and Well).

Our expertise spans development and construction in the housing sector.



Project Manager



Certification
Submitted, audit
in progress



MBA



Green Building
Culture Award
Toronto Construction
Association



CaGBC Toronto
Chapter Member, and
prior Director



Oxford Executive
Leadership
Programme



Julie Scarcella,

With over 25 years of entrepreneurial experience, Julie is a sought-out expert as a researcher for topics in the built environment.

She is an innovation guru on the topic of sustainability and is a specialist in developing new processes, IT, and tools to enable the construction industry to work smarter. She has deep knowledge in the low-carbon and healthy building material sector and has worked as a sustainable design and a green building strategist subject matter expert.

The Building Research Establishment (BRE UK), founded by the Queen over 100 years of building science, codes, and sustainability co-founded EcoSpex in 2010.

Today our company is launching a Canadian platform - automating product manufactures documents/data to include: (low carbon, water, dementia, cleantech and proptech) to enable Architects, Engineers, Contractors and Developers access to verified and trusted products and technologies for new and retrofit construction.

Volunteer Working Board



David Odgen

Principle Secure Capital

Responsibilities: Finance, Development, and Sustainability Green Buildings, works with Habitat for Humanity on all housing developments.



Mike Vance

Vance & Associates

Responsibilities: Master planning, sustainability consulting, resort community specialty, Lead in policy, Co-founded Whistler Housing Authority and the Whistler Development Corporation.



Doug Leighton

EDG Associates

Responsibilities: International experience in urban design, planning, and sustainable development. Co-founded Banff Housing Corporation.



Trent Collier

Construction Manager, Bird Construction

Responsibilities: With over 19 years of experience, Trent has been working in the construction industry most of his life, overseeing major construction development programs while ensuring their successful execution.



Julie Scarcella

EcoSpex Inc.

Responsibilities: Funding, Technical expertise in the built environment, housing to meet net zero standards, project planning and strategic management.



Cathy Fernandes

CEO Mr&Mrs Jones Inc Marketing .

Responsibilities: Marketing, Digital Strategy, Negotiation, Advertising and Strong business development professional



Bindu Shah

Urban Planner, Housing Policy Specialist , Strategic Lead, Planning, Town of Caledon

Responsibilities:

Advisor on Housing Concierge Development Program, policy, incentives etc.



Rod Nadeau

Builder, Developer Building Innovation Group

Responsibilities:

Provides 12 open concept designs for affordable housing MURB, Townhouses. Developer Builder of High-Performance Buildings

The Problem

Federal and provincial government roles continue to apply pressure on municipalities to facilitate and/or provide affordable housing..

Municipalities play a key role in ensuring affordable housing opportunities be realized in their communities. Planning for and developing affordable housing takes a very specific skill set, expertise and capacity to make informed decisions to deliver needed housing.

Municipalities don't have access to a community of practice to increase the knowledge and organizational capacity, critical resources to create affordable housing.



The Opportunity Concierge Program and Developers Tools

Concierge Program and Developers Tools

A program to assist non-profit housing providers and private-sector developers of affordable rental and ownership housing, to navigate through site selection, funding, incentives, partnerships, policy, and municipal approvals processes. The essence of the program is to set up the communities for success - build knowledge, capacity for Council, help staff review opportunities and assist developers on affordable housing projects, reduce silos, risks, built trust and ensure quality assurance.

The program will be set up internally for each planning department, with consultation with staff and training provided. The developers' tools will be piloted with selected developers delivering affordable housing projects.



FCM/Green Municipal Funding (GMF)

This initiative will drive new efficiencies through the pre-development, pre-planning, and construction phases to support affordable housing and community development.

The Federation of Canadian Municipalities' Green Municipal Fund (GMF) through the Sustainable Affordable Housing (SAH) technical team reviewed the proposed scope of work to determine suitability. It was determined that the Concierge Program as well as additional developers' tools meet the objectives of the SAH Fund.

Concierge Program may include:

- ✓ Partnerships/MOU/Head leases
- ✓ Costing Proformas to meet Net Zero
- ✓ Outreach for developers
- ✓ Development considerations
- ✓ Housing policies
- ✓ Preferential review of affordable housing delivery
- ✓ Housing models
- ✓ Incentives
- ✓ Checklists to inform Staff and Council to support the decision-making process
- ✓ Trusted resources and tools to support the development/builders' requirements
- ✓ Training/Mentorship
- ✓ Glossary of Terms



Concierge Developers Package for Affordable Housing



Municipal Benefits

The Concierge Development Program will be tailored and developed to meet each municipality requirements. Training will be set up for council, staff and developers. The suite of tools and resources, templates will support new efficient processes to ensure a sustainable future for affordable housing.

- Provides an efficient process
- Builds trust and relationships within the development community
- Drives efficiencies early in the pre-development processes/planning approval process
- Increase development process and capacity
- Promotes a streamlined approach to planning, saving time and costs
- Acquire skills and knowledge which can be applied to ongoing and future projects
- Access to resources and training
- Provides a set of metrics to quantify & qualify the right resources for the development community
- Utilize a user-friendly checklist to help integrate the planning application for review process of new affordable housing developments

Developers, Housing Providers Benefits

- Guidance on the application process for submission requirements
- Build skills to increase in-house capacity and shovel in the ground development projects
- Learn about the different types of affordable housing projects/case studies
- Access trusted tools and templates at pre-development
- Receive training on all resources
- Save money and time, drive project efficiencies
- Access a network of subject matter expertise/peer review that spans across Canada with knowledge and experience that will provide quality resources and training /provides support when needed
- Access trusted construction Proformas to Net Zero /Passive House for different housing typologies
- Learn the common terminology and language in the affordable housing ecosystem

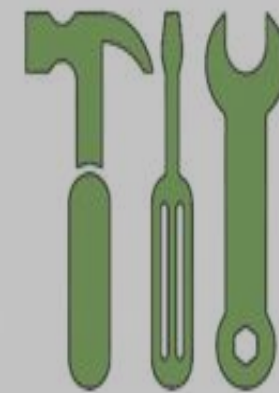
Building Capacity



Skills and Knowledge



Mentorship



Tools and Templates



National Network

How do we get there?

The technical team is seeking funding to support the preparation for the FCM/GMF funding application and delivery of the Concierge Program and Developers tools. The project must identify 1 lead municipality, one affordable housing project (new construction and or a retrofit) and a minimum of 3 municipalities.

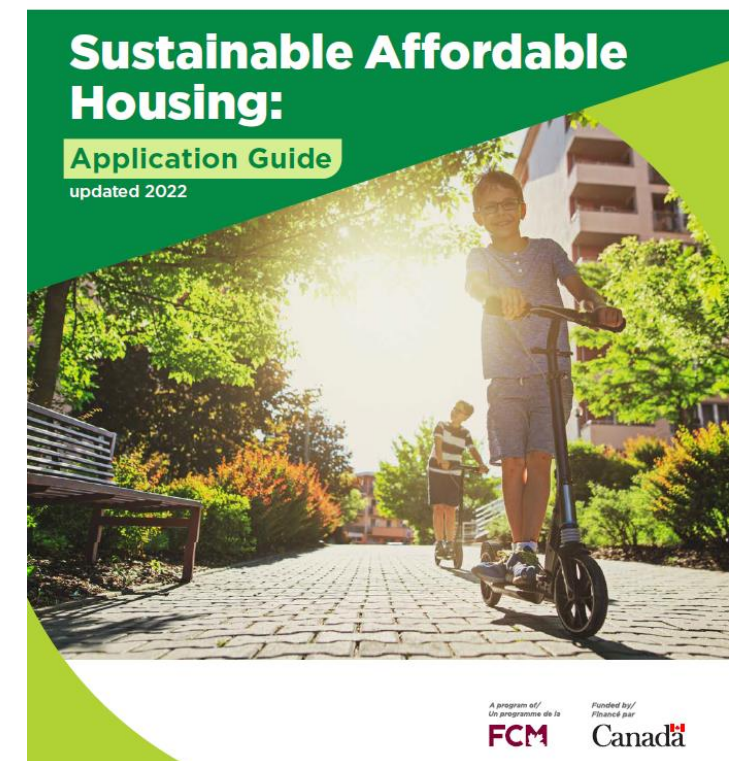
The project team has identified a 2 Phased Approach:

Phase 1: the technical team must prepare the funding application which is due before Christmas.

- Finalize the application process, and letters of support from partner municipalities.
- Firm up agreements with each partner municipality and cash contributions to support phase 2.
- Develop the scope, budgets, timelines, and milestones
- Establish pilots' projects with partner municipalities and developers
- Submit all the GMF requirements for the lead municipality

Phase 2: Develop and Deliver the Concierge Program, Tools and Training

- Develop the concierge program and developers' tools
- Review options to how the program will be adopted for each partner municipality and long-term updates
- Test the tools on X many municipalities
- Develop case studies and launch a monitoring program to ensure long term success
- How the tools are managed long term will be explored to support the participating municipalities



Request of Council

The Grant provides up to 80% of eligible costs

- Up to a maximum of \$500,000

Pilot grants provide funding to test innovative and ambitious technical, process or business model solutions to improve affordable housing outcomes.

Municipal Contribution

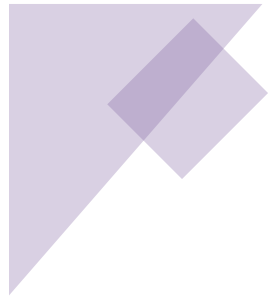
Each partner municipality will provide a contribution between \$10,000-25,000 dispersed in two phases.

Phase 1: \$10,000 for the preparation of the funding application with funds to be dispersed November 2023, **the deadline for FCM/GMF submission is before Christmas.**

Phase 2: to determine the budget, the project team will complete all FCM/GMF funding requirements to include: workplan, scope, costs, milestones, and timelines for the development of the concierge program and developers' tools. Release of funds would start February 2024.

It is estimated that each municipality should budget up to \$15K for Phase 2. The budget amount from each partner municipality would be reduced as more and more municipalities participate.





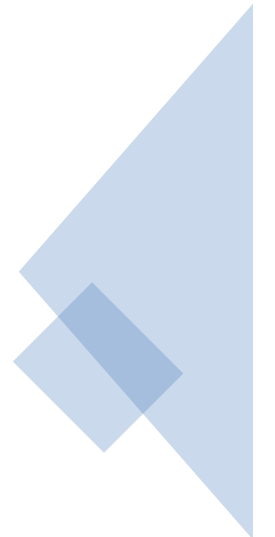
Contact

EcoSpex Inc.
Founder and Project Manager

Julie Scarcella,

705 445-1256

Julie@ecospex.com



Appendix 1

What we do:
Georgian Bay Housing
Development Corp. (not-
for-profit)



Georgian Bay Housing Development Corporation providing affordable housing solutions

A one stop shop





Envision this..

Georgian Bay Housing Development Corporation (GHDC)

Ensures that every citizen in our region, has good choices in where they live, and opportunities to reach their fullest potential.

An arm's length, non-profit to deliver housing

Board of directors with specific expertise that centralizes resources for developing and delivering housing throughout the region.

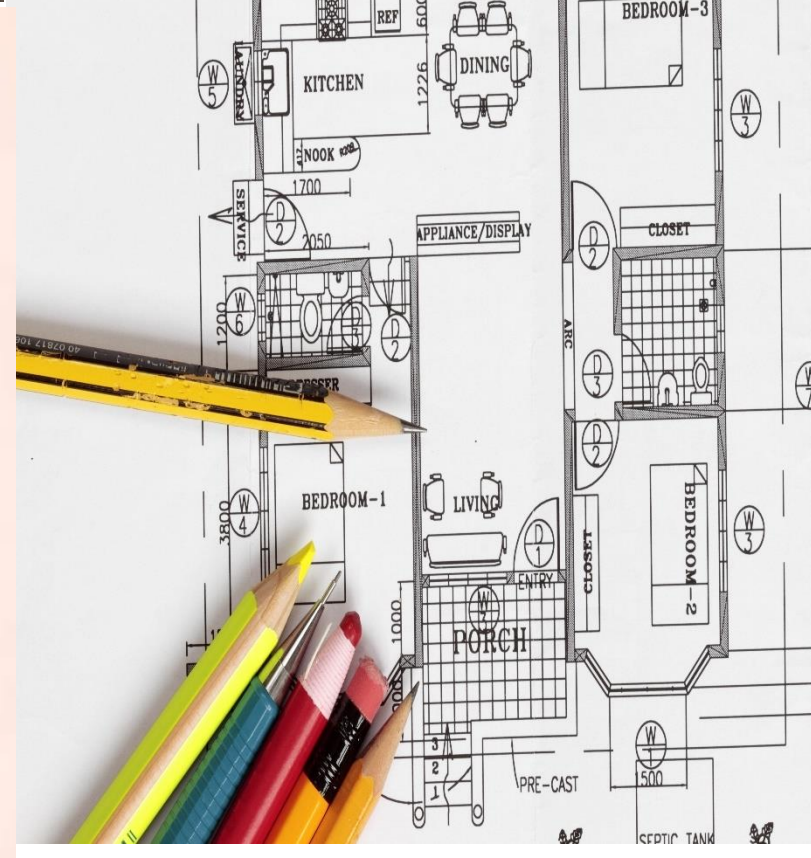


Why Now

To meet the rising demand for affordable housing in the Georgian Bay (Grey, Bruce and Simcoe regions) innovative solutions and transformative actions are required.

The region cannot meet the housing demand, therefore; to increase external investment, increase **supply of affordable housing for all and ensure the long-term sustainability of the affordable housing system, the Georgian Bay Housing Development Corporation (GBHDC) is being put forward.**





Mission

We support organizations and build affordable housing by developing, vibrant, affordable, and inspiring places to live and work.

GBHDC Vision

Provides solutions for environmentally sustainable housing (rental, homeownership, technical consulting to enable municipalities and developers to access trusted tools, templates, resources, training) for our communities.

Georgian Bay Housing Development Corporation will partner with local communities' organizations, non-profits, charities, institutional, private owners' municipal governments, and market developers to create or acquire projects that deliver on our mission.

Not-for-profit development corporations work in arm's length, independent, in partnership with organizations and local government and not politically influenced by council.

Our goal is to increase the supply of affordable housing to enable housing for all residents who live in the region to remain in the region.



Affordable Home Ownership



Rental Housing Development



Development Management Services. Access tools, support for funding applications, templates, resources and training as well as consulting



What unmet needs/gaps would Georgian Bay Housing Development Corporation provide?

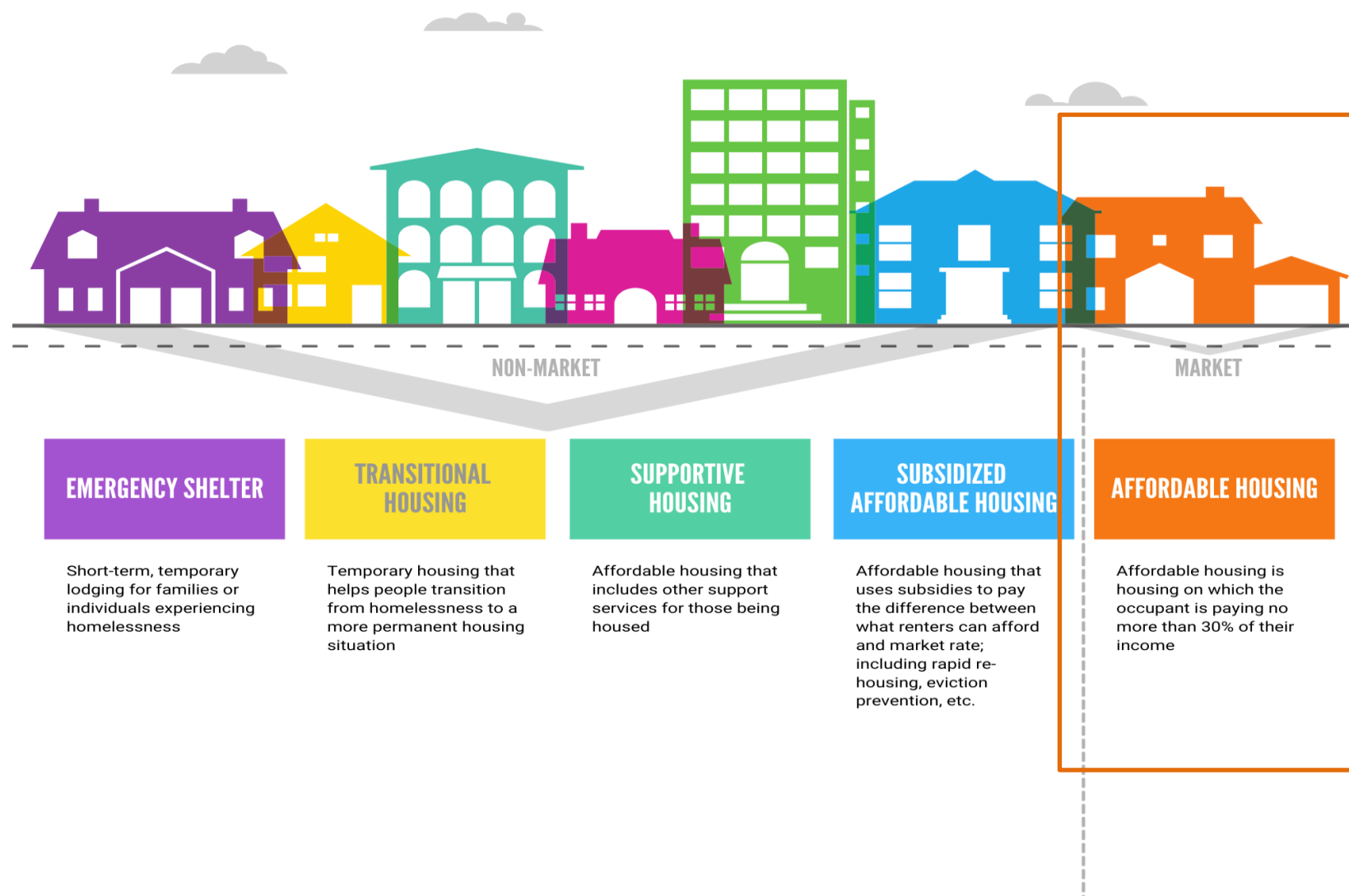
- Deliver on the **vision**
- Drives private public **collaboration** and partnerships

Provide:

- Operational, **capacity** and support, board expertise
 - Deliver a range of housing types based on regional needs
 - Centralizes the knowledge, skills,/tools
 - Reduce duplication/silos
- Critical resources for developers and builders
 - Hires local people to execute, establish working committees on key areas of focus
- **Supports training** in green skills for trades
- **Leverages funding** to deliver key priorities
- **Pool** and resources
- Annual **ESG performance** review/recognition

Georgian Bay Housing Development Corp will:

HOUSING CONTINUUM



Partner and Build housing which might include:

- Cooperatives
- Tiny Homes
- Prefab projects
- Workforce Housing low to mid-rise
- Townhomes
- Single family homes/communities
- Seniors' homes
- Seniors' homes that support (Design for Dementia)
- Rental apartments
- Duplex, Triplex
- Small Apartment buildings



Seniors and Design for Dementia Studios



