



To: Council

Prepared by: Julie Scarcella, Mike Vance Project Lead GBHDC

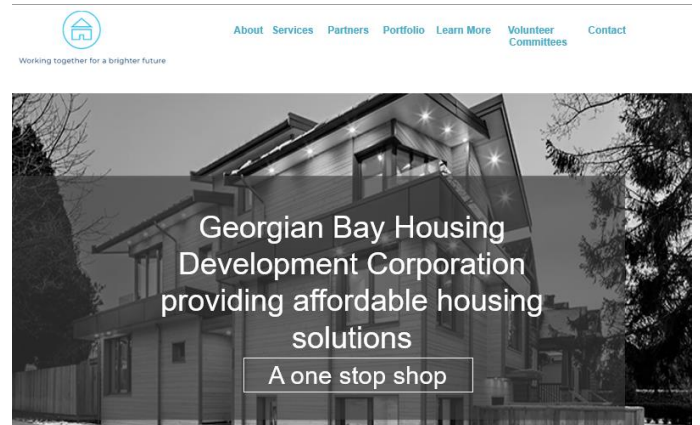
RE: New Tools and Resources for Affordable Housing - Request to Partner on FCM/GMF Funding Application

Date: November 5th, 2023

Background

The Georgian Bay Housing Development Corporation (GBHDC) proposes to develop and deliver innovative solutions to meet the rising demand for affordable housing in the Georgian Bay Region. The purpose of our proposal is to develop collaborative, affordable housing resources for non-profit and private housing developers to move forward on building the required housing stock that our rural communities need.

Two and a half years of consultation on local housing challenges has exposed a lack of technical tools and resources that would get more shovels in the ground. Municipalities struggle with staffing capacity or access to communities of practice that would increase the knowledge, organizational capacity, critical resources to create more affordable housing. We need local leadership, focused resources, as well as stakeholder engagement with developers, not-for-profit partners, housing supply chain and municipal partners to prepare the right environment to make these projects happen in our region.



Solution

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



Spring 2023 conversations began with senior staff at the Federation of Canadian Municipalities' Green Municipal Fund (GMF) through the [Sustainable Affordable Housing](#) (SAH) funding stream. The project technical team reviewed the proposed scope of work from the [SAH pilot funding](#) to determine suitability. It was determined that the proposed [Concierge planning process](#) as well as additional developers' tools meet the objectives of the SAH Fund and might include:

**Concierge
Developers
Package for
Affordable Housing**



- Partnership agreements/MOUs/head lease templates
- Housing policies

- Costing proformas
- Outreach for developers
- Development considerations
- Preferential review of affordable housing delivery
- Housing models
- Incentives
- Internal processes/checklists to inform staff and Council decision making process
- Provides trusted resources and tools to support the development/builders' requirements
- Training/Mentorship
- Glossary of Terms

The success of affordable housing projects requires expertise, collaboration and coordinated effort with municipal partners, housing providers and developers to create the right foundation for achieving success.

How will FCM/GMF funding be essential for the realization of this project?

FCM/GMF funding would provide the necessary resources to:

- (1) Hire the project team to write and submit on the FCM/GMF funding application
- (2) Engage with local municipalities to better understand their needs and present the proposed concierge program and other services/resources with municipal staff and developers.
- (3) Identify how the process would be developed and adopted for municipal use
- (4) Develop the concierge program, resources, and tools to enable the municipalities to scale up on affordable housing projects
- (5) Pilot the tools and new processes on real housing project
- (6) Develop and deliver training
- (7) Benchmark the success of the project (measurement and reporting)
- (8) Develop a Case Study

The services will set up the planning department for success and assist non-profit and private-sector developers of affordable rental and ownership housing in navigating site selection, funding, incentives, partnerships, access commonly used tools for the pre-development process and municipal approval processes to help to bring affordable housing to market. The essence of the program is to set communities up for success - build knowledge and capacity among staff and Council, help staff review opportunities, and assist affordable housing developers in reducing risks, building trust, and quality assurance.

A concierge program works with developers, and other housing providers one-on-one assistance to help municipal staff, guide owners, market developers and not-for-profits in navigating pre-development and planning process approvals. The Concierge program provides a single point of contact that coordinates the resources from a team of housing specialists that staff can leverage and receive training. Having a single point of contact, with support from an affordable housing technical team, will provide the tools and advice to ensure proponents who are meeting County goals of increasing the supply of affordable and attainable housing, have the best chance of success.

What does mean for your municipality?

Participating municipalities will have access to subject matter experts and a housing technical team, where they can access expertise and provide insights and input on the suite of tools tailored to their local requirements. The Concierge Development Program will be developed to meet staff requirements and drive the development process, training will be provided to help set up internal requirements and how to use the tools. The suite of tools and resources, templates will support new efficient processes to ensure a sustainable future for affordable housing.

Next Steps

- The project team has identified 1 lead municipality to support the FCM/GMF lead applicant.
- To support the FCM/GMF application process, we need to confirm support and participation from additional partner municipalities.
 - Gather letters of support and cash contributions from all partner municipalities
 - Develop the scope, budgets, timelines, and milestones per the funding application process
 - Establish pilots' projects (affordable housing new development/retrofitting)
 - Develop Test the concierge program and toolkit on with staff and on pilot housing projects with a focus on rural communities
 - Develop case studies and launch a monitoring program to ensure long term success

FCM/GMF Funding Application

The technical team is seeking funding to support the preparation for the FCM/GMF funding application and follow up with the municipalities regarding partnership opportunities, and review of contributions of matching funding.

Grant for 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.

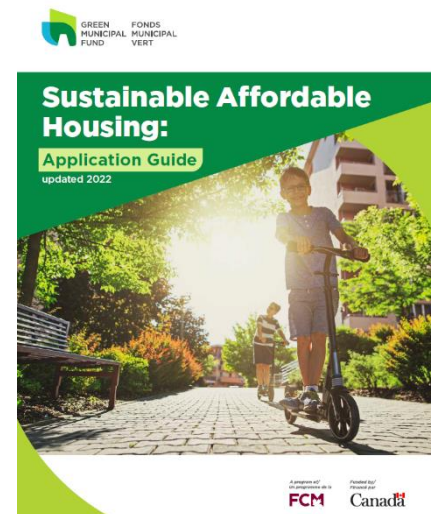
Municipal Contribution

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 early 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 mid-December.

It is estimated that each municipality should budget for 15K. The budget amount from each partner municipality would be reduced as more and more municipalities sign up.



FCM/GMF Affordable Housing Contribution

FCM will provide up to 80% of the \$500,000. If the budget for phase 2 is \$325,00 we would need a contribution of \$65,000 from the municipalities. If we leveraged 7 municipalities for contribution, we would require \$9,200 from each one. If less municipalities participate then it will cost more etc.

If the budget is \$400,000, we would need \$80,000 etc.

Phase 1: Prepare Funding Application

A project manager will be hired to coordinate the technical team to write and consult with FCM/GMF funding application lead, etc. During the application process the technical team will coordinate the letters of support, investigate a business case for the Concierge Program and additional tools for the developers to ensure a win/win application.

The technical consulting team will:

- Finalize a budget, business Case with an initial scope and work plan for GMF submission requirements
- Meet with FCM/GMF senior staff on any revisions to satisfy the funders requests for the project
- Follow up with Q&A from the municipalities, short list the tools and resources into a matrix for priorities timelines and costing
- Establish a contract with the lead municipality and partners to engage the EcoSpex technical team to deliver and execute the FCM/GMF tools, scope, and milestone reporting for Phase 2.
- Sign off on the contract with the lead consultant
- Communicate to all partners the executive summary of the funding application- provide updates
- Timelines - 7 weeks to prepare (30+ days to write the application) and collect the letters of support and or other requirements from the funding agency

Phase 2: Funding awarded by FCM/GMF

- Deliver the detailed Project Scope, Work Plan/Timelines and Project Costing
- Prioritize the key items to be developed first and assess the hiring of the technical team
- Conduct interviews with Town staff (planning, finance, legal)
- Deliver the scope of work and priorities, and timelines.

Contact Details

Project Manager
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Appendix 1 - About Us

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



David Odgen
Principle Secure Capital

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



Doug Leighton
EDG Associates

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



Julie Scarcella
EcoSpex Inc.

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



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.



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.



Cathy Fernandes
CEO Mr&Mrs Jones Inc Marketing

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



Bindu Shaw
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: 12 open concept designs for affordable housing MURB, developer input

Appendix 2 - Concierge & Development Tools Program Benefits

Municipal Benefits

- 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

Development Community 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 that meet Net Zero /Passive House housing typologies
- Learn the common terminology and language in the affordable housing ecosystem

Appendix 3 - Work done to date

Project lead on the initiative has been Julie Scarcella, with insights and direction provided by Mike Vance and the working board representatives.

2021 the Georgian Bay Housing Development Corporation working group made a commitment to championing affordable housing development opportunities. Extensive time and expertise to develop and deliver quality information on housing issues to the public and municipalities includes:



Over 12 Municipalities in Grey and Bruce have received information packages and deputations over the span of 2 years. Over the past 2.5 years the GBHDC working group has been building the foundation to support municipalities and developers to include:

1) Background Summaries and Communication of the Vision

- Introductory letters, executive summaries, deputations, online discovery meetings

2) Presenting the proposed not-for-profit Corporation/Vision

- Preparation of PowerPoint presentations, background documents, online meetings/Q&A

3) Ongoing communication and outreach

- Email follow-up for meetings, further outreach on the plan, how it will work. Case studies were also presented, including prioritization of the services to be provided. Meetings with Developers.

4) Budget Costing

- Use of funds (draft) for the Corporation (3, 6, and 12 months for the startup incorporation and operations).

5) Meeting with Federal Funding to include FCM and CMHC. Pre-qualified to participate in federal funding Canadian Municipalities' Green Municipal Fund (GMF) through the Sustainable Affordable Housing (SAH) funding stream.

6) Investigation of the Incorporation requirements

- Reviewed 5 not-for-profit development corporations in Canada and developed board requirements to include skills and job responsibilities. Assessment of operations and best practices analyzed to include but not limited to:

BC models

- Catalyst Housing Vancouver Island
- Canmore Community Housing Corporation
- Attainable Homes Calgary
- Whistler Housing Corp established in 1980s, now grown into Development Corporation and a Housing Authority
- Banff established its Housing Corporation in the early 1990s. Canmore created its Community Housing Corporation in early 2000s

Ontario models

- Cahdco Real Estate Development Corporation Ottawa
- Indwell Affordable Housing- Burlington
- Prince Edward County Affordable Housing Corporation
- London Ontario Housing Corporation

7) Business Development - start up documentation

- Deputation preparation and delivery
- Drafting partnership agreements
- Case studies presentation on Housing Types
- A collection of best practices, services, tools, and other applicable resources along with case studies has been ongoing to help shape and inform the short- and long-term operations of the proposed corporation. The intention is to leverage all the good information across Canada to help develop outstanding services, resources.

8) Established a partnership with Habitat for Humanity Grey/Bruce

Habitat for Humanity Grey/Bruce is providing its support by co-sponsoring at a financial lever (grant guarantor) to allow for the new Georgian Bay Housing Development Corporation (GBHDC) to 1) prepare to incorporate and 2) execute engagement to the community regarding what resources, tools to shortlist to support the scaling for affordable housing projects for the Georgian Bay region.

9) County discussions

Preparation for County deputations, travel and discussion, presentation and follow up to Q&A. A total of 6 meetings with Grey County, Bruce, and Simcoe.

10) Toolbox Foundations Training for Development Corporations

Cahdco was created in 1996 by CCOC following the provincial government's withdrawal from investing in affordable housing to create & promote affordable housing development in Canada. Cahdco specialize in helping non-profits develop affordable housing in Ottawa & Eastern Ontario. In 2022 Cahdco received funding by CMHC to develop a national initiative launching a **community of practice to increase** the amount of affordable housing development corporations across Canada. Our working board and project manager participated in a 10-week training and skills building included: <https://www.cahdco.org/toolbox-by-cahdco/>

- Toolbox+ Knowledge Sharing & Capacity Building for Affordable Housing Projects
- Toolbox+ connects you to the knowledge you need to develop a project or grow your organization's development capacity.
- Toolbox+ is an affordable housing development community of practice that consists of two programs: The Blueprints Program and The Foundations Program.
 - ✓ The Blueprints program is intended for organizations that are early in the development process and primarily interested in learning and gaining knowledge of development activities.
 - ✓ The Foundations program is for organizations that have experience with development and are interested in building upon these skills to increase their in-house capacity and sell development services to others.