REQUEST FOR PROPOSAL P2019-18

REGION OF WATERLOO
NEW AFFORDABLE RENTAL HOUSING

DEADLINE FOR QUESTIONS DATE: August 8, 2019

CLOSE DATE: August 15, 2019, 2:00:59 p.m.

CLOSING LOCATION:
The Region of Waterloo
150 Frederick St., 4th Floor
Procurement Division, Reception Desk
Kitchener, ON N2G 4J3
THE REGIONAL MUNICIPALITY OF WATERLOO
PROPOSAL P2019-18

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PROPONENT'S CHECK LIST

Before submitting your proposal, check the following points:

1. Has your proposal been properly signed?

2. Are the documents complete?

NOTE: Your proposal will be informal and may be disqualified if ANY of the foregoing points (if applicable) have not been complied with.
SECTION A

INSTRUCTIONS TO PROPOUNENTS

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1. DESCRIPTION

The Region of Waterloo is seeking proposals for new affordable rental housing for low to moderate income households. Additional details can be found in Section B – Scope of Work.

2. CLOSING DATE AND TIME

Proponents shall be solely responsible for the delivery of their proposals in the manner and time prescribed herein.

Proposals for **P2019-18 NEW AFFORDABLE RENTAL HOUSING** will be received until **2:00:59 p.m. on AUGUST 15, 2019** at The Region of Waterloo, Procurement Office, Reception Desk, 4th Floor, 150 Frederick Street, Kitchener, Ontario N2G 4J3.

The time of 2:00:59 p.m. will be determined based on the wall clock located at The Region of Waterloo, Procurement Office, Reception Desk, 4th Floor, 150 Frederick Street, Kitchener, Ontario N2G 4J3. Proposals received at 2:01:00 p.m. or later will be deemed to be late and non-compliant and will be returned unopened to the bidders and no contract in regard to the bid process will be created as between the bidder and the Region of Waterloo.

Proposals shall be enclosed and sealed in an envelope with the envelope template provided affixed securely to the front of the envelope.

3. DESIGNATED OFFICIAL

Questions, clarifications, or interpretations regarding this Request for Proposal shall be requested in writing and shall only be directed to:

Tina Reay, Supervisor, Procurement, Corporate Services, Treasury Services

*Tina’s EMAIL (TReay@regionofwaterloo.ca)*

**ENSURE THAT P2019-18 - IS REFERENCED IN THE EMAIL SUBJECT LINE**

The deadline for questions for **P2019-18 NEW AFFORDABLE RENTAL HOUSING** will be received until **2:30 p.m. on AUGUST 8, 2019**. The Region reserves the right to not address questions received after the specified deadline for questions has passed.

4. BID DOCUMENTS

Only documents posted on the Region’s website are to be considered the “official” documents. The Region accepts no responsibility for the accuracy of information found on other websites. Bid documents are only published on the Region’s, **Bid Opportunities** website (https://bids.regionofwaterloo.ca).
5. CLAIMS OR LITIGATION

The Region of Waterloo will not open and consider bids received from parties with whom the Region is in litigation or pending litigation unless approval allowing such is obtained by the bidder from the Council of the Region of Waterloo prior to the close of the bid.

Bids which are unopened pursuant to this policy will be returned to the proponents and no contract in regard to the bid process will be created as between the bidder and the Region of Waterloo.

The terms “litigation” and “pending litigation” are defined in the Region’s Purchasing By-law.

In order to obtain approval from Council of the Region to open and consider a bid, the bidder, before the close of the bid, must contact the Regional Clerk and the Manager, Procurement in writing at least one (1) week before the next regularly scheduled Council meeting, setting out the bidder’s request and any grounds to support the request. The bidder’s request will then be presented to Council for its consideration.

The Regional Clerk and the Manager, Procurement may be contacted at:

Regional Clerk’s Office
150 Frederick Street, 2nd Floor
Kitchener, ON N2G 4J3
Fax (519) 575-4481

Information on the regularly scheduled Council meetings can be found on the Region’s website regarding Council Agendas and Minutes (http://www.regionofwaterloo.ca/en/regionalgovernment/agendasminutes).

6. ADDENDA

a) If a proponent finds discrepancies in or omissions from the RFP Documents, or if they are in doubt as to their meaning, the bidder shall notify the Region.

b) The Region reserves the right, for any reason, to issue addenda to the proponents at any time prior to bid closing. Addenda issued during the bidding period shall be allowed for by the proponent in submitting the bid.

c) Any information or changes to the requirements for this RFP opportunity will be posted on the Region’s, Bid Opportunities website (https://bids.regionofwaterloo.ca) in the form of an addendum. All addenda posted prior to the closing date shall be considered part of the contract documents. When an addendum is issued, the Region will attempt to send a notification email to all registered plan takers with a link to the addendum. The Region makes no promise or guarantees that addenda will be delivered by any means to any bidder nor is the Region responsible for computer malfunctions or delays; therefore, it is the bidder’s sole responsibility to check the website for
any addenda prior to the RFP closing. By submitting a proposal, the proponent acknowledges and agrees that they have checked the website and that their bid incorporates all addenda.

d) No addenda will be issued within 48 hours of the closing date except to extend or cancel the bid.

7. TIMELINE OF IMPORTANT DATES

1) The following table summarizes important dates as it relates to the RFP. All dates are provided in good faith and may be subject to change and are to be viewed as a best estimate only.

Table 1: Important Dates

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<td>RFP Release</td>
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<td>Deadline for Questions</td>
<td>August 8, 2019</td>
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<td>Deadline for Release of Final Addenda</td>
<td>August 12, 2019</td>
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<td>RFP Closing Date</td>
<td>August 15, 2019</td>
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<td>Proponent Interviews (if required)</td>
<td>August 22 - 27, 2019</td>
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<td>CSC Report seeking Council approval on Selection Committee Recommendations for RFP Award Available</td>
<td>October 1, 2019</td>
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<tr>
<td>Regional Council Meeting (Award)</td>
<td>October 9, 2019</td>
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<tr>
<td>Conditional Letter of Commitment(s) Issued (Subject to Provincial approval)</td>
<td>November 15, 2019</td>
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8. BID ACCEPTANCE

a) Each proposal must be properly signed by an authorized official or principal who has authority to bind the proponent.

b) The Region reserves the right to reject any or all proposals, including without limitation the lowest proposal, and to award the funding to whomever the Region in its sole and absolute discretion deems appropriate, notwithstanding any custom of the trade to the contrary nor anything contained in the bid and RFP Documents.

c) The Region shall not, under any circumstances be responsible for any costs incurred by any proponent in the preparation of its proposal.

d) Without limiting the generality of the foregoing, the Region reserves the right, in its sole and absolute discretion, to accept or reject any proposal which in the view of the Region is incomplete, obscure, or irregular; uncertain, which has erasures or corrections in the documents, which contains exceptions, variations or qualifications; which omits one or more prices; or which otherwise fails to comply with the requirements herein.
e) Each Proponent shall satisfy the Region, as to their ability and experience in developing and operating affordable rental housing project as presented in their Proposal. The Region will not Award an allocation to any Proponent that cannot furnish evidence satisfactory to the Region, in its sole discretion, that they have the necessary ability, dedication, equipment, capital and experience to provide the proposed project as outlined in this RFP document.

f) Subject to the Proposals received and evaluation recommendations from Selection Committee, the Region reserves the right:

a) To allocate funding for any Proponent that meets the eligibility criteria;

b) Not to allocate any funding that meets the eligibility criteria;

c) To Award no funding at all, for any reason; and

d) To negotiate a Proponent’s proposed funding allocation, identified tenant population, staffing model, unit types, number and sizes, and/or budget; and

e) To permit the Region to fill an identified housing need with available resources.

g) The Region reserves the right in its sole discretion to clarify any Proposal after the RFP closing date. The response received by the Region from a Proponent shall, if accepted by the Region, form an integral part of that Proponent’s Proposal. The Region reserves the right to interview any or all Proponents to obtain information about or clarification of their Proposals. In the event that the Region receives information at any stage of the evaluation process which results in earlier information provided by the Proponent being deemed by the Region to be inaccurate, incomplete or misleading, the Region reserves the right to revisit the Proponent’s evaluation result.

h) Proposals which fail to conform to the requirements of the RFP in form or content may be disqualified as non-compliant. However, the Region may, in its sole discretion, waive minor non-compliance and retain, for consideration and possible Award, Proposals which do not conform to the requirements of the RFP in form or content, where such Proposals appear to offer the best value to the Region. Proponents are cautioned that any such retention of non-conforming Proposals for evaluation and possible Award will be a rare event and solely at the Region’s discretion. Proponents are urged to ensure their bid is fully compliant with all requirements of this RFP.

i) The Region in its sole and absolute discretion, reserves the right at any time to re-bid or cancel the request for proposal, or negotiate a contract for the whole or any part of the project with any one or more persons whatsoever, including one or more of the proponents.

j) The Region reserves the right to communicate with one or more proponents following the bid close to clarify elements of the bids.
k) In the event of a tied proposal, the Region may evaluate and accept a proposal, in its absolute and sole discretion, based upon experience, efficiencies or cost considerations other than price. In the event of a tied proposal, the Region also reserves the right in its sole and absolute discretion to flip a coin as between the tied proponents or to cancel and re-issue the request for proposal.

l) This proposal is irrevocable and open to acceptance by the Region up to and including, but not after 120 calendar days after the bid closing.

9. DISQUALIFICATION OF BIDS

a) The proposal must be legible in ink or typewritten and all items must be bid.

b) Bids which are incomplete, conditional, or obscure, or which contain erasures or alterations not properly initialed, or irregularities of any kind, may be disqualified at the sole discretion of the Region.

c) Should the Region consider non-compliance with the formal requirements of the proposal to be minor in nature, it reserves the right to waive such requirements at its sole discretion.

d) Proponents who have submitted proposals that have been disqualified by the Region because of informalities will be notified.

10. WITHDRAWAL OF PROPOSALS PRIOR TO BID CLOSING

a) A proponent who has submitted a proposal may request that their proposal be withdrawn. The withdrawal shall only be allowed if the request is made before the closing time for the submission of proposals. Withdrawal requests must be directed to the designated official by letter, telegram, and fax or in person. Telephone requests will not be considered.

b) When withdrawals are made in person, the official receiving bids shall obtain a signed withdrawal form confirming the details. If the person is other than a senior official of the bidder, and for letter, telegram or fax withdrawals, the authenticity of the request must be confirmed by telephoning a responsible official of the bidder.

c) Bids confirmed as withdrawn prior to being placed in the bid box, shall be returned unopened to the bidder.

d) Withdrawal notices received after the bid has been deposited shall, together with the confirmation of withdrawal, be placed in the bid box. These bids are dealt with at the opening by announcing that the bid was withdrawn. The bid amount of a withdrawn bid shall not be read out.

e) The withdrawal of a bid does not disqualify a bidder from submitting another bid on the same contract.
11. RECTIFICATION PROCESS

Notwithstanding any other term and condition in this RFP, upon the RFP closing date and receipt of submissions, if the proposal does not include a fully completed set of requirements as set out in this RFP the Region, at its discretion may provide the Proponent an opportunity to rectify the deficiencies within two (2) business days by 2:00:59 p.m. EST. Proponents must submit the information in person to the Procurement Office by the required day and time as noted in the Rectification Notice. This timeline is considered mandatory and no extensions will be provided.

The Procurement Office will issue Rectification Notices by email to the proponent Contact. The Proponent must ensure that any contact information is current and up to date. Proponents who do not comply and fail to provide the required information within the rectification period will be disqualified.

12. CONFLICT OF INTEREST

a) The bidder declares that no member of the Council of the Region and no officer or employee of the Region will become interested directly or indirectly as a contracting party, partner, shareholder, surety, or otherwise in or in the performance of the Contract or in the supplies, work or business to which it relates, or in any portion of the profits thereof, or in any of the money to be derived therefrom.

b) Should the proponent believe that a conflict of interest or potential conflict of interest exists; the proponent must disclose this information to the Region prior to the acceptance of the proposal. The Region may, at its sole discretion, withhold acceptance of the proposal until the matter is resolved to the Region’s satisfaction.

c) The Region may disqualify a proposal if it believes that a conflict of interest or potential conflict of interest exists or it may, at its sole discretion, allow a conflict of interest or potential conflict of interest to exist if it is satisfied that there are adequate safeguards in place and if the Region determines that it is in its best interests to do so.

13. CONFIDENTIAL INFORMATION OF THE REGION

All information provided by or obtained from the Region in any form in connection with this RFP either before or after the issuance of this RFP:

a) is the sole property of the Region and must be treated as confidential;

b) is not to be used for any purpose other than replying to this RFP and the performance of any subsequent contract for the deliverables;

c) must not be disclosed without prior written authorization from the Region;

d) must be returned by the Proponent to the Region immediately upon the request of the Region.
14. CONFIDENTIAL INFORMATION OF THE PROPOSENT

A Proponent should identify any information in its proposal or any accompanying documentation supplied in confidence for which confidentiality is to be maintained by the Region. The confidentiality of such information will be maintained by the Region, except as otherwise required by law or by order of a court or tribunal. Proponents are advised that their proposals will, as necessary, be disclosed, on a confidential basis, to advisers retained by the Region to advise or assist with the RFP process, including the evaluation of proposals. If a Proponent has any questions about the collection and use of personal information pursuant to this RFP, questions are to be submitted to the Procurement Office.

15. FREEDOM OF INFORMATION

The proponent acknowledges that any bid submitted shall become a record belonging to the Region and therefore is subject to the Municipal Freedom of Information and Protection of Privacy Act. This provincial law gives individuals, businesses and other organizations a legal right to request records held by the Region, subject to specific limitations. The proponent should be aware that it is possible that any records provided to the Region, including but not limited to, pricing, technical specifications, drawings, plans, audio-visual materials or information about staff, parties to the bid or suppliers could be requested under this law. If the proponent believes that all or part of the proposal should be protected from release, the relevant parts should be clearly marked as confidential. Please note that this will not automatically protect the submission from release, but it will assist the Region in making a determination on release if a request is made. The identity of all proponents, as well as total proposal prices, may be available to the public under the Region’s Purchasing By-law.

16. COLLUSION AND PRICE FIXING

a) By submitting a bid, the proponent certifies that:

(i) The prices in the proposal have been arrived at independently of those of any other proponent;

(ii) The prices in the proposal have not been knowingly disclosed by the proponent, and will not knowingly be disclosed by the proponent prior to selection of the successful proponent, directly or indirectly, to any other proponent or competitor; and

(iii) No attempt has been made, or will be made, to induce any other person to submit or not to submit a bid, for the purpose of restricting competition.

b) The Region may disqualify a bid if it believes that any of the prohibited acts in a) have occurred.
17. ENTIRE AGREEMENT

a) The RFP Documents contain all the terms and conditions and requirements relating to the RFP.

b) Any other information, including but not limited to:

(i) verbal communications with any person including an elected official, officer, employee, agent or consultant of the Region;

(ii) written documentation from any source including from an elected official, officer, employee, agent or consultant of the Region;

(iii) past practices or qualifications accepted by the Region for prior request for proposals; and

(iv) any industry customs are not relevant and should not be relied upon by the proponent unless such is specifically incorporated into the RFP Documents or any addendum thereto, by the Region.

18. DISPUTE RESOLUTION

a) If the proponent has any complaint, disagreement or dispute whatsoever in regard to the manner in which the Region, its elected officials, officers, employees, or its consultants and advisors, has or is carrying out the bid which cannot be resolved then the proponent shall submit its complaint, disagreement or dispute in writing to the Region’s Chief Financial Officer as soon as practicable and the Region’s Chief Financial Officer shall investigate the complaint, disagreement or dispute forthwith and provide a written report as he or she deems necessary to the bidder with the results arising from such.

b) Any conclusions and recommendations of a written report from the Region’s Chief Financial Officer will be implemented, as necessary, in the request for proposal unless such conclusions and recommendations are no longer possible because the request for proposal has been awarded or for any other reason, in which case, the conclusions and recommendations will be considered and implemented, as necessary, by the Region for future request for proposals.

19. ERRORS AND OMISSIONS

It is understood, acknowledged, and agreed that while this RFP includes specific requirements and specifications, the Region shall not be held liable for any errors or omissions in any part of this document. While the Region has used considerable effort to ensure an accurate representation of information in this document, the information contained in the document is supplied solely as a guideline for proponents. The information is not guaranteed or warranted to be accurate by the Region, nor is it necessarily comprehensive or exhaustive. Nothing in the document is intended to relieve the proponents from forming their own opinions and conclusions with respect to the matters addressed in the document.
20. **EXCLUSION OF LIABILITY**

The Bidder acknowledges and agrees that the Region of Waterloo may be required as part of this Bid to:

a) make certain determinations or rulings in regard to the Bidder’s compliance or another bidder’s compliance with the terms and conditions of the Bid;

b) exercise any discretion that it has reserved to itself in this Bid, or that it has by law;

c) make an award of the Bid whether to the Bidder or to another bidder;

d) cancel the Bid and re-bid the corresponding works in whole or in part at a later time; and/or

e) cancel the Bid and all corresponding works.

(hereinafter referred to as a “Decision”) in a manner or on grounds that the Bidder disagrees or disputes.

In this regard, the Bidder, by submitting a bid, acknowledges and agrees, notwithstanding any other terms and conditions of the Bid, any express or implied duties that the Region of Waterloo may owe the Bidder, including without limitation any implied duty of fairness, or any remedies available to the Bidder at law or in equity, that its sole recourse and remedy against or in regard to the Region of Waterloo, its elected officials, officers, employees, or its consultants and advisors, arising from or related in any way to a Decision shall be in accordance with the Dispute Resolution paragraph of the Bid and that in **NO EVENT** shall the Region of Waterloo, its elected officials, officers, employees, or its consultants and advisors, be liable or responsible, in any way whatsoever, to the Bidder, its officers, directors, employees, consultants, subcontractors, suppliers, sureties or insurers, for any claims, actions, causes of action, contracts, damages, including without limitation direct, indirect, consequential, incidental, general, special or exemplary damages, any economic losses, any lost profits, lost opportunities, expenses, costs, including without limitation any expenses or costs to prepare a bid, or any other losses arising from or related in any way whatsoever to a Decision.

21. **LOBBYING RESTRICTIONS**

Proponents, their staff members, or anyone involved in preparing the Proposal shall not discuss directly or indirectly engage in any form of political or other lobbying whatsoever or seek to influence the outcome of this RFP process during the black out period. This restriction extends but not limited to:

a. Region staff,

b. Regional Council, and

c. any members of the media.
The Region may reject any Proposal by a Proponent that engages in such lobbying, without further consideration, and may terminate that Proponent’s right to continue in the purchasing process.

During a RFP process, all communications shall be made through the Procurement Office. No Proponent or person acting on behalf of a Proponent or group of Proponents, shall contact any elected official, Prime Contractor or any employee of the Region to attempt to seek information or to influence the Award.

22. DE-BRIEFING

After the RFP has been awarded, unsuccessful Proponents may request a debrief session to discuss their Proposal submission. The Procurement Office will facilitate the debriefing session for the purpose of explaining the evaluation process and to provide meaningful feedback to the Proponents Proposal submission.

Debrief sessions will only be offered to unsuccessful Proponents and must be scheduled within 60 days of the Proponent being notified of the result.

23. PROPOSAL SUBMISSION

To be considered complete, one (1) original and six (6) copies of the proposal clearly identified with the RFP number and title must be received by the Region prior to the closing date and time.

All proponents are required to submit their proposal in a sealed envelope with the Envelope template (Appendix D) securely affixed to the front of the envelope. A signing sheet, signed by an individual authorized to bind the company must be submitted with the Envelope. Envelope must be sealed with the envelope template attached.

Submissions must be submitted on the forms-provided in the bid documents and bear an original signature, not a photocopy or facsimile.

All prices in the proposal are to be in Canadian funds.

24. PROPOSAL SUBMISSION FORMAT

Evaluation of proposals is made easier when proponents respond in a similar manner. The following format and sequence should be followed in order to provide consistency in proponent response and ensure each proposal receives full consideration. All pages should be consecutively numbered. The bid submission should be at a minimum stapled or put in a binder; no loose leaf submission will be accepted.
The proposal submission should include one (1) original and (6) six copies of the complete submission and should not exceed fifteen (15) single-sided letter size pages in length (excluding appendices), utilizing 12 sans serif (e.g., Arial) fonts, at six lines per inch and one inch margins. The Proposal must be typed (i.e. MS Word, MS Excel). Handwritten submissions will be disqualified. Proposals must be well ordered, detailed and concise. Clarity of language and adequate documentation are essential.

A total of seven (7) Proposals must be submitted:

a) One (1) original Proposal with original signatures and must be marked as “MASTER” on the first page.

b) Six (6) copies of the Proposal photocopied and marked as “DUPLICATE” on the first page.

The Region encourages Proponents to format the Proposals (including the Master and Duplicates) as follows:

a) Printed on 8.5" X 11" white paper,

b) Single spaced and printed on both sides of the paper (double sided), and

c) 12 point font with one inch (1”) standard margins.

The Region may allocate the funding on the basis of Proposals submitted, without negotiations. Therefore, each Proposal should contain the Proponent’s best terms/information, including all required documentation and information. Where proposals intend to represent a formal partnership, the partnership must be evidenced with a written letter of understanding, written Memorandum of Understanding between organizations.

Note on partnerships: All partnerships must be evidenced by written letter of understanding or written Memorandum of Understanding between the proponents, outlining each Proponent’s roles, function, and responsibilities. One agency is considered the “Lead Agency”. Information for all agencies included within the proposal must be included with the bid submission in one envelope. Each agency does not submit their own individual submission.

25. EVALUATION AND AWARD

The Region’s Evaluation Committee will evaluate the submitted proposals based on assessments against the weighted criteria.

The Region intends to enter into a contribution agreement with the selected proponent(s) based on the proposal obtained at the time of selection. In the event that a proposal does not precisely and entirely meet the requirements of this RFP, the Region reserves the right to enter into negotiations with the selected proponent(s) to arrive at a mutually satisfactory arrangement with respect to any modifications to the proposal.
The Region of Waterloo reserves the right to reject or decline any or all proposals submitted in response to this RFP. Regional Council shall review and consider for approval any recommend construction-ready priority projects. The Region reserves the right to reject otherwise qualified proposals in order to achieve region-wide geographical balance in the distribution of affordable units under this RFP to address local priorities or need. The Region reserves the right to offer a funding allocation to Proponents which may differ from the amount requested by Proponents through this RFP, at its discretion, based on the amount of annual IAH-E and OPHI funding available.

Regional staff will work with recommended proponents to advance priority projects to a stage where they are ready to be forwarded to the Province of Ontario for consideration for IAH-E and OPHI funding. Projects that receive approval from the Province of Ontario, if any, will be notified and will receive a conditional letter of commitment and must be able to start construction within 120 days of signing a contribution agreement with the Region of Waterloo. Contribution Agreements must be signed prior to December 31, 2019. Successful proponents will be required to submit interim and project status reports tied to the completion of key project thresholds and any associated milestones.

For Concept Proposals, the Region will work with recommended proponents to advance their projects to a stage where they are construction-ready, at which point they can apply to any future RFP for consideration for a funding allocation.

All or any prior agreements, representations, statements, negotiations, understandings, undertakings and proposals, either written or oral, relating to this subject matter are hereby superseded by this Request for Proposal.

Proponents are advised that this information is to be provided at their own expense.

The Region may wish to interview proponents after submissions have been reviewed for clarification. However, should it be evident from the information provided that one proposal is clearly superior; the Region reserves the right to negotiate with that vendor to enter into a contract without soliciting proposals from others.

Proponents are further advised that no allocation of funding may result from the Request for Proposal.


Stage One - Screening for Completion of Proposal

1) For a Proposal to be considered for a funding allocation as a construction-ready project:
   a) It must be complete, and have all of the required supporting documentation to comply with all requirements for submission as set out herein, and
   b) It must satisfactorily demonstrate that the Proponent’s Proposal complies with all eligibility requirements as set out in Section B 2.
2) If the Selection Committee identifies deficiencies, they may be addressed through the rectification process as outlined in Section A 10.

**Selection Committee**

3) Each Proponent’s Proposal will be fully reviewed, evaluated, and scored by a Selection Committee made up of Regional employees from the Housing Services, Treasury Services, and Procurement, provided that the Proponents proposal has first passed the mandatory requirements.

4) As part of the evaluation process, Proponent(s) and/or any third parties listed in the Proposal may be contacted to verify and/or provide clarification on the Proposal.

**Proponent Interview (if required)**

5) As part of the evaluation process, proponents may be required to attend an interview with members of the Selection Committee to clarify any information contained in the Proposal.

**Evaluation**

6) Each member of the Selection Committee will independently examine each Proposal and enter a mark for each evaluation component for the proposed project as outlined in Table 2.

7) The Selection Committee as a group will discuss their individual assessments of the Proposals to arrive at a consensus assessment, based on the evaluation criteria.

8) The consensus assessment score for each evaluation component will be added together for a mark out of 100.

In order for a proposal to be considered by the Evaluation Committee as a construction-ready project, the proposal must meet all six (6) mandatory requirements seven (7) for supportive housing proposals). Construction-ready proposals will be evaluated and ranked separately from concept proposals.
Table 2: Evaluation Criteria

<table>
<thead>
<tr>
<th>Component</th>
<th>Assessment Criteria</th>
<th>Weight</th>
</tr>
</thead>
</table>
| Mandatory Requirements for Construction-ready proposals | • Evidence of incorporation.  
• Evidenced of ownership or have an accepted offer to purchase the subject property.  
• Two most recent audited financial statements; if not available additional information provided to substantiate or establish liquidity and debt management is required.  
• The required zoning is in place.  
• At least 40 per cent of the units at or below 60 per cent AMR.  
• Start construction within 120 days of signing a contribution agreement.  
• Confirmation of funding to provide support services (for supportive housing Proposals only). | Yes/No  |
<table>
<thead>
<tr>
<th>Component</th>
<th>Assessment Criteria</th>
<th>Weight</th>
</tr>
</thead>
</table>
| Objectives | - To build new sustainable affordable rental housing, including housing available to lower-income households.  
- To create a range of housing with supports in either new or existing developments that provide support services to allow families and individuals to live independently.  
- To build housing that addresses affordable housing needs in less serviced areas of the Region.  
- To build affordable housing that supports the planning and land-use policies of the Region of Waterloo and Area Municipalities, particularly transit-supportive development within or in immediate proximity to ION station areas.  
- To build affordable housing that is truly integrated into the community (e.g. through design excellence and use of high quality materials).  
- To create affordable housing that addresses economic, environmental and community sustainability.  
- To build energy efficient and well-designed housing that delivers adequate unit sizes, provides for overall visitability.  
- To building affordable housing that is located on or near a Grand River Transit route and in close proximity to schools, recreational facilities, shopping and services.  
- To incorporate partnerships with organizations and agencies to address other community interests.  
- To dedicate units to households currently on the Region’s centralized waiting list for Community Housing.  

Preferences | - Are proposing small to mid-sized developments or mixed developments.  
- Plan to have units remain affordable housing beyond the term of the 25 year contribution agreement.  
- Will provide supportive housing and have funding in place to provide support to the intended target client group.  
- Propose one-bedroom units.  
- Propose large (four/five bedroom) ground-oriented units for large families within Cambridge, Kitchener and Waterloo.  
- Address other high-need household categories on the Region’s centralized waiting list for Community Housing.  
- Propose more than 40% of the units to be available at, or below, 60% average market rent (AMR). | 30 |
### Address Regional Objectives and Preferences (continued)

**Preferences (continued)**
- Achieve the Affordability Targets in Section 4 with a per unit funding allocation at considerably less than the maximum allocation eligible.
- Commitment to a smoke-free policy.
- Provide equity contributions (funding, property, in-kind, etc.) greater than the minimum requirements.
- Involve partnerships with other organizations that address broader community interests and social development.
- Plan for use of apprentices or un/under employed individuals during construction.

### Proponent Qualifications and Partnerships

- The proponent has a proven track record in developing and managing affordable rental housing projects.
- References.
- Strength of project team.
- The proponent and any/all partners identified in the proposal demonstrate the capacity and financial capability to undertake and operate the proposed development.
- Previous experience working with proposed partner(s).
- Proposed partners are a good fit given the target group(s).
- Proof of commitment from support service agencies.

### Project Concept, Design and Location

- Alignment with Affordable Housing Strategy and 10 Year Housing and Homelessness Plan.
- Proposed target group(s).
- Appropriate location for target group.
- The site design and building materials are compatible with the neighbourhood and the building will improve the quality of the neighbourhood.
- Amenities and building features, including on site laundry facilities.
- VisitAble design and accessibility features greater than Building Code requirements.
- Energy efficiency features greater than Building Code Requirements.
- Project schedule.
## Component: Financial Plan

- Evidence of financial competence.
- Amount of IAH funding requested and percent of total capital cost.
- Equity contribution, including confirmation of long-term equity partnership between private and not-for profit partners for OPHI funding.
- Mortgage financing details.
- Proposed rent levels.
- Reasonableness of proposed rent reductions for having tenants pay some or all utilities.
- Financial viability of proposed capital/ operating budgets.
- Financial commitment or confirmation of existing capacity for any support services.

<table>
<thead>
<tr>
<th>Component</th>
<th>Assessment Criteria</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Plan</td>
<td>• Evidence of financial competence.</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>• Amount of IAH funding requested and percent of total capital cost.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Equity contribution, including confirmation of long-term equity partnership between private and not-for profit partners for OPHI funding.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Mortgage financing details.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Proposed rent levels.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Reasonableness of proposed rent reductions for having tenants pay some or all utilities.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Financial viability of proposed capital/ operating budgets.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Financial commitment or confirmation of existing capacity for any support services.</td>
<td></td>
</tr>
</tbody>
</table>

**Total Possible Points:** 100%
SECTION B
SCOPE OF WORK
### SECTION B

**SCOPE OF WORK**

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<th>PAGE</th>
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<td>1. DEFINITIONS</td>
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<tr>
<td>2. DESCRIPTION OF THE PROGRAM</td>
<td>27</td>
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<tr>
<td>3. PROPOSAL COMPONENTS</td>
<td>36</td>
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</tbody>
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1. **DEFINITIONS**

**Addendum or Addenda:** a document or documents issued by the Regional Municipality of Waterloo (“the Region”) as a supplement to this Request for Proposals (“RFP”) that explains errors, inconsistencies, provides clarification or responses to questions submitted by Proponents or otherwise details or updates information provided in the Request for Proposals.

**Affordable Housing:** housing facilities in which the average rent for each unit, inclusive of all utilities, is less than or equal to the most recently released average market rent (AMR) levels published by Canada Mortgage and Housing Corporation (CMHC) for Waterloo Region.

**AODA:** Accessibility for Ontarians with Disabilities Act and the regulations enacted under the AODA as amended.

**Award:** means authorization to proceed with the Contribution Agreement process with the Successful Proponent.

**Bidder:** means an alternative term for Proponent.

**Conceptual Project:** means a Proposal by a proponent that is in the beginning stages of developing a plan and may not have a site, no formal drawings or no detailed business plan and feasibility analysis at this time, but the proponent is interested in creating affordable housing in the future and would like to work with Regional staff to further develop their Proposal.

**Contribution Agreement:** means a binding agreement between (2) two parties to provide services to be executed between the Region and the Successful Proponent pursuant to the terms of the RFP.

**Council:** means the Council of The Regional Municipality of Waterloo.

**General Conditions:** mean the conditions which apply to the RFP as a whole and any subsequent Contribution Agreement - which the Proponent must adhere to during the Request for Proposal process and during the term of any Agreement following an Award.

**Head:** the most senior person, of a participating municipality, who is responsible or oversees a range of activities such as a Department/Division Head, Commissioner, and/or Deputy CAO of a participating municipality.

**Proponent:** any entity submitting a proposal in response to this RFP.

**Proposal:** means the offer contained in a Proposal submitted in response to this RFP by a Proponent.

**Request for Proposal (RFP):** the submission of a Proposal that meets the bidding procedures, general terms and conditions, specifications, sections and appendices and all addenda required.

**Region:** means The Regional Municipality of Waterloo.

**Selection Committee:** means the Committee consisting of Regional employees who are responsible for the review and evaluation of the Proponents submitted proposal.
Strategy: means the Region of Waterloo Affordable Housing Strategy.

Successful Proponent: means the selected Proponent that is moving forward with the process to enter into a Contribution Agreement.

2. DESCRIPTION OF THE PROGRAM

The Region of Waterloo has created a new Affordable Housing Strategy (AHS) 2014-2019 with the goal to address the housing needs of at least 700 low-to-moderate income households through the creation of 350 new affordable housing units and the preservation and retention of 350 existing affordable homes. For more information on the new Affordable Housing Strategy 2014-2019, please visit the Region’s website (www.regionofwaterloo.ca/ahs).

In August 2014, the Governments of Canada and Ontario announced an extension to the Investment in Affordable Housing for Ontario Program (IAH-E which will provide $801 million in funding for affordable housing in Ontario over six years. The Region has $1,799,410 remaining in IAH-E Year 6 funding for new affordable rental housing.

In April 2019, the Province announced new senior government funding under the Canada-Ontario Community Housing Initiative (OPHI) and the Ontario Priorities Housing Initiative (OPHI). The Region has a total OPHI allocation for 2019-20. Of this, $3,884,400 is proposed for new affordable rental housing (subject to approval of the OPHI Investment Plan by Regional Council). As OPHI is a multi-year commitment, it is anticipated that subsequent RFPs will be issued.

As per the terms and conditions of this RFP for affordable rental housing, the Region of Waterloo now invites non-profit and private sector proponents (IAH-E funding only) to submit proposals for new affordable rental developments that meet the objectives of the Region’s new AHS 2014-2019 and the Provincial guidelines (available on the Region’s website under the new Affordable Housing Strategy 2014-2019 (www.regionofwaterloo.ca/ahs)).

Under this RFP, the Region will consider proposals for funding allocations up to $5,399,883 in for fiscal year 2019-2020. This funding is comprised of up to $1,799,410 in remaining IAH-E funding and $3,599,883 in OPHI funding (subject to approval of the OPHI Investment Plan by Regional Council). Proponents can identify on the appropriate form in Appendix B which funding (or both) they want to apply to for an allocation. Any funds not allocated through this RFP may be the subject of a future RFP or reallocated to other capital components as permitted under the IAH (2014 Extension) and OPHI Program Guidelines.
Table 3: Capital Funding Available Under RFP 2019-18

<table>
<thead>
<tr>
<th></th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>IAH-E</td>
<td>$1,799,410</td>
</tr>
<tr>
<td>OHPI</td>
<td>$3,599,883 (subject to Regional Council approval)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$5,399,883</strong></td>
</tr>
</tbody>
</table>

The IAH-E and OHPI funding is available for affordable rental housing for various low to moderate income households, including supportive housing.

**Eligibility Requirements**

The following proponent types will be considered: private sector (IAH-E only), non-profit, charitable corporation, municipal non-profit, co-operative, and private/non-profit partnership.

As noted in the Program Guidelines, it is the Ministry’s intention to focus OHPI Rental Housing component funding on the development of community housing that will provide long-term public benefit. Equity partnerships between private and non-profit housing providers are eligible as this arrangement generally ensures longer-term affordability. Other innovative partnerships may be considered on a case-by-case basis and subject to approval by the Ministry. At a minimum, these partnerships would need to be for at least a 25-year period. A rent supplement agreement with a private developer would not constitute a partnership.

Proposed housing developments can include new construction, acquisition and rehabilitation of projects that are at risk of being lost to the rental housing stock, and conversion of non-residential buildings to rental buildings.

Projects that are not eligible include:

- Community Housing that receives ongoing federal subsidies and/or provincial subsidies for the replacement of existing units;
- Purpose-built student housing;
- Nursing and retirement homes;
- Shelters and crisis care facilities;
- Time-limited housing without security of tenure;
- Repairs/renovations to existing buildings, unless part of an acquisition proposal or results in the creation of new units; and
- Owner-occupied or secondary suites in owner-occupied housing.

The Proponent’s proposed development must be within the boundaries of Waterloo Region (City of Cambridge, City of Kitchener, City of Waterloo, Township of North Dumfries, Woolwich Township, Wesley Township, and Wilmot Township).
Proponents of construction-ready projects must own or have an accepted offer to purchase the property that they are submitting the expression of interest on. The required official plan and zoning designations must be in place to permit the proposed development. Proponent must be able to have all municipal approvals (severance, minor variance, site plan approval) in place to be in a position to sign a contribution agreement by December 31, 2019 and start construction within 120 days of signing a contribution agreement.

Proponents must demonstrate experience and expertise in project development, residential construction and property management, and being in good standing as an existing housing provider, as applicable. Proponents must demonstrate the capacity and financial capability to undertake the proposed development.

The Province of Ontario has indicated that a key program objective of the IAH-E and OHPI is to promote and support the use of apprentices and the training of skilled labour. Successful proponents would be required to incorporate this element into the contractor selection process. The Region is required to report on initiatives/activities used to promote or support apprentices, the number of apprentices employed and the type of trade the apprentices are training in. Successful proponents must ensure that all contractors and sub-contractors hired actively implement initiatives/activities to promote or support apprentices and submit associated reporting as required.

RFP submissions should be designed to achieve a maximum number of Program Objectives and Preferences. The Region of Waterloo reserves the right to prioritize projects on the basis of the amount of public investment required and the degree to which a project achieves the program objectives and preferences.

A successful proponent will be required to enter into a Contribution Agreement with the Region of Waterloo for a minimum of 25 years, or as otherwise prescribed, to ensure that affordability goals are met and properties are well maintained. Proponents are encouraged to review the conditions and requirements included in the sample Contribution Agreement in Appendix A. Regional Council and/or the Province of Ontario reserve the right to include such additional terms and conditions governing the provision of assistance to a proponent as may be required.

The Proponent must demonstrate organizational, financial, and management capacity to operate an affordable rental housing building and meets the terms and conditions of funding, including accurate, complete, and timely reporting, as demonstrated in this Proposal and by its past record.

The Proponent confirms that, if successful in this RFP, they will meet all the conditions of and sign the Contribution Agreement (See Appendix A for a sample).

**Program Objectives**

Building on the new AHS 2014-2019, the Region is seeking proposals that achieve as many of the following program objectives as possible:

- To build new sustainable affordable rental housing, including housing available to lower-income households;
• To create a range of housing with supports in either new or existing developments that provide support services to allow families and individuals to live independently;
• To build housing that addresses affordable housing needs in less serviced areas of the Region;
• To build affordable housing that supports the planning and land-use policies of the Region of Waterloo and Area Municipalities, particularly transit-supportive development within or in immediate proximity to ION station areas;
• To build affordable housing that is truly integrated into the community (e.g. through design excellence and use of high quality materials);
• To create affordable housing that addresses economic, environmental and community sustainability;
• To build energy efficient and well-designed housing that delivers adequate unit sizes, and provides for overall visitability;
• To building affordable housing that is located on or near public transit and in close proximity to schools, recreational facilities, shopping and services;
• To incorporate partnerships with organizations and agencies to address other community interests; and
• To dedicate units to households currently on the Region’s centralized waiting list for Community Housing.

Preferences
As there are limited funds available in the Region under the IAH-E and OPHI, preference will be given to proposals from experienced housing providers that can deliver units within the IAH-E and OPHI timeframes that address local housing needs and will provide optimal benefit for dollars spent. Preference will be given to proponents that:
• Propose small to mid-sized developments (proposals over 30 units should include a mix of market rent units that would not receive IAH-E or OPHI capital funding);
• Have a long-term plan to have units remain as affordable housing beyond the term of the 25 year contribution agreement;
• Provide supportive housing and have funding in place to provide support to the intended target client group;
• Propose one-bedroom units;
• Propose large (four/five bedroom) ground-oriented units for large families within Cambridge, Kitchener and Waterloo;
• Address other high-need household categories on the Region’s centralized waiting list for Community Housing;
• Propose more than 40% of the units to be available at, or below, 60% average market rent (AMR), or ODSP Shelter Component for one-bedroom units;
• Achieve the Affordability Targets in Table 4 with a per unit funding allocation at considerably less than the maximum allocation eligible;

• Are in close proximity to Grand River Transit and ION routes, in particular within ION station areas;

• Provide on site laundry facilities;

• Commit to providing smoke-free buildings;

• Have a commitment to use apprentices, provide training of skilled labour and/or un/under employed individuals, or incorporate youth employment opportunities during construction;

• Provide equity contributions (funding, property, in-kind, etc.) greater than the minimum requirements (private sector proponents must contribute at least 10% equity for IAH-E funding only, private/non-profit partnerships must make a 4% equity and non-profits 0% equity contribution); and

• Involve partnerships with other organizations that address broader community interests and social development (e.g. incorporates space for community programs, or social enterprise).

Affordability Targets

Currently, the greatest need for affordable housing in the Region is for lower-income households. As such, a priority of the new AHS 2014-2019 is to create units affordable to the lowest income households in the Region by targeting new units created to be generally available at 60 per cent of CMHC AMR or lower. For these households whose primary income source is Ontario Disability Support Payments, Ontario Works, minimum or low wage, or seniors on fixed income, rents at 60 per cent of the CMHC AMR are generally considered within their means. Proposals under this RFP are required to have at least 40 per cent of the units available at no more than 60 per cent of AMR (see Table 4). Proponents who are targeting households in receipt of OW or ODSP should have rents set at no more than the maximum shelter rate, as applicable.

Integration of a mix of households with different social and economic circumstances is an ongoing objective. Therefore, the proponent can propose a range of rent levels for the remaining 60 per cent of the units such that the average overall rent for all the units receiving IAH-E and OPHI capital funding is at or below 80 per cent AMR. In no instance shall any IAH-E and OPHI funded units have a rent greater than the CMHC AMR or alternate rents. Proponents can include units above the CMHC AMR in their proposal, but such units will not be eligible for IAH-E and OPHI funding.

The most recent CMHC AMRs, published in the fall 2018 Rental Market Report Kitchener - Census Metropolitan Area (CMA) or alternate rents, are as follows:
Table 4: Current - Average Market Rents (AMR) and Target Rents Per Month

<table>
<thead>
<tr>
<th>Unit Size (Number of Bedrooms)</th>
<th>Average Market Rent</th>
<th>80% of AMR</th>
<th>60% of AMR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor</td>
<td>$796</td>
<td>$637</td>
<td>N/A</td>
</tr>
<tr>
<td>One-bedroom</td>
<td>$1,021</td>
<td>$817</td>
<td>$497**</td>
</tr>
<tr>
<td>Two-bedroom</td>
<td>$1,210</td>
<td>$968</td>
<td>$726</td>
</tr>
<tr>
<td>Three-bedroom</td>
<td>$1,291</td>
<td>$1,033</td>
<td>$775</td>
</tr>
<tr>
<td>Four-bedroom+</td>
<td>$1,506*</td>
<td>$1,205</td>
<td>$904</td>
</tr>
</tbody>
</table>

* This market rents are based on an alternate average market rent.

** Set at the ODSP shelter component.

These rent targets are based on the inclusion of utilities (heat, hydro, water, hot water). Proponents intending to have the tenants pay some or all of the utilities must propose reductions to the target rents listed in the Table 4 and provide rational or supporting information for the proposed reduction. The impact of utilities and other charges (i.e. parking, storage lockers) to be paid by the tenants on rent levels will also be considered in evaluating RFP submissions.

All units with rents set at 60 per cent AMR will be occupied by applicants referred from or eligible to be on the centralized waiting list for Community Housing. The Region will not accept bachelor units for referrals and the referral units must be equally disbursed throughout the project and based on Preferences as stated in this RFP. Proponents are encouraged to make more than the required 40 per cent of units available at 60 per cent AMR.

The Region, at its option, may require the Proponent to enter into a rent supplement agreement for a maximum of 25% of the units in the Project at any time during the term of the Contribution Agreement.

**Income Verification**

The Region of Waterloo is required to establish maximum income limits annually for units receiving IAH-E and OPHI funding. All eligible households must be on, or eligible to be on, the waiting list for Community Housing, including household income limits. The income limits establish the maximum amount of gross annual income that households may have to be eligible to occupy a unit funded under IAH-E and/or OPHI, including this RFP (see Table 5).
Table 5: 2019 Household Income Limits by Bedroom Size

<table>
<thead>
<tr>
<th>Unit Type</th>
<th>Maximum Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor</td>
<td>$27,000</td>
</tr>
<tr>
<td>One Bedroom</td>
<td>$34,500</td>
</tr>
<tr>
<td>Two Bedroom</td>
<td>$42,000</td>
</tr>
<tr>
<td>Three Bedroom</td>
<td>$51,000</td>
</tr>
<tr>
<td>Four + Bedroom</td>
<td>$65,500</td>
</tr>
</tbody>
</table>

Supportive Housing

New affordable supportive housing is a priority in Waterloo Region. Supportive housing includes permanent housing with on-site staff and/or services that assist individuals and families to stabilize in housing and live as independently as possible. Supportive housing can serve people with a variety of support needs including aging, mental health, substance use, physical disabilities and/or cognitive issues. The support services can be provided by the proponent, or through an agreement with an outside agency. Sustainable funding for the support services may be provided by the proponent, the Waterloo-Wellington Local Health Integration Network, Provincial Ministries, Community Homelessness Prevention Initiative or other sources. The provision of supports along with a stable, affordable home increases quality of life for households requiring such support, and provides more stability than emergency and institutional settings.

Funding through this call for RFPs is only available to assist with capital costs. Proposals that included a supportive housing component must indicate the source and amount of ongoing support funding and provide written confirmation from the funding agency with the proposal. Supportive housing proponents must also provide details on the support services and staffing levels to be provided as well as provide a separate operating budget for the support services indicating that the provision of support services is financially viable on its own.

Planning and Design Requirements

Preference will be given to proposals that integrate good urban design elements, demonstrates enhanced energy efficiency and accessibility features, and meets the Area Municipality’s planning objectives and design guidelines, in addition to basic site-specific development requirements. The proponent should consult with the appropriate Area Municipality prior to submitting their proposal. The successful proponent will be responsible for completing and obtaining all necessary development approvals in a timely manner and will be expected to work collaboratively with Area Municipal staff to achieve design excellence and true community integration.
The average and minimum unit sizes listed in Table 6 should be considered as minimum requirements and will be reviewed in evaluating RFP submissions. The average applies to all units of the same size in a proposal. Bachelor units may make up no more than ten per cent of the total funded units.

### Table 6: Target Unit Sizes by Type

<table>
<thead>
<tr>
<th>Unit Type</th>
<th>Bachelor</th>
<th>1-Bed</th>
<th>2-Bed</th>
<th>3-Bed</th>
<th>4-Bed</th>
<th>5-Bed</th>
</tr>
</thead>
<tbody>
<tr>
<td>AVERAGE</td>
<td>450 ft²</td>
<td>592 ft²</td>
<td>725 ft²</td>
<td>1,000 ft²</td>
<td>1,175 ft²</td>
<td>1,300 ft²</td>
</tr>
<tr>
<td></td>
<td>41.8 m²</td>
<td>55.0 m²</td>
<td>67.4 m²</td>
<td>92.9 m²</td>
<td>109.2 m²</td>
<td>120.8 m²</td>
</tr>
<tr>
<td>MINIMUM</td>
<td>430 ft²</td>
<td>525 ft²</td>
<td>650 ft²</td>
<td>900 ft²</td>
<td>1,100 ft²</td>
<td>1,200 ft²</td>
</tr>
<tr>
<td></td>
<td>40.0 m²</td>
<td>48.7 m²</td>
<td>60.4 m²</td>
<td>83.6 m²</td>
<td>102.2 m²</td>
<td>111.5 m²</td>
</tr>
</tbody>
</table>

The Region supports designs that are inclusive of all residents and allows basic access to everyone regardless of age and level of mobility. VisitAble housing is based on the concept that individuals who use wheelchairs, walkers, or have some other form of mobility impairment or a parent with a stroller can move freely throughout the main level of a home or unit in an apartment building. VisitAble housing has three main features:

- Provide a no-step entrance (at the front, back or side of the house);
- Wider doorways and clear passage on the main floor and common areas in apartments; and
- A main floor bathroom that can be accessed by visitors who use mobility devices.

Proponents are to indicate how their proposal addresses the three features of VisitAble housing. Additional information on VisitAble housing can be found through the Waterloo Region dot org website, VisitAble Housing section (http://www.waterlooregion.org/visitable). Additional accessibility or universal design features proposed of the building should also be indicated in the submission. Proponents that target housing for persons with disabilities are also encouraged to provide accessible units with features and design details above the minimum Ontario Building Code requirements and Accessibility for Ontarians with Disabilities Act and indicate how these features address their specific target group’s needs.

**Sustainability Measures**

The affordable housing built under this Program must:

- Be similar in size and amenities to other housing in the community;
- Improve environmental performance of buildings, materials based on current established principles, practices, materials and standards; and
- Have durable materials and equipment at the time of construction which will reduce maintenance and replacement costs.
Proponents are encouraged to include energy efficiency features in the building above code requirements and ENERGYSTAR-rated appliances should be used when available. Proponents will receive preference for declaring to use energy star certified products in the building design. Energy efficient features may include but are not limited to: heating, cooling and or ventilation systems (i.e. high efficiency gas heat system or describe your proposed system); use light-emitting diode (LED) lighting in all common areas, building exterior and residential units; insulation and high performance building envelopes beyond the minimum Ontario Building Code (OBC) requirements; Energy Star certified windows and doors; Energy Star certified appliances; Smart Meter; product(s) that reduce water consumption (beyond OBC requirements) and window blinds.

Projects funded under the IAH-E and OPHI are subject to the Canadian Environmental Assessment Act (CEAA, 2012), and therefore prior to entering into a contribution agreement, successful proponents will be required to confirm that their project proposal does not impose adverse impacts that cannot be mitigated.

Funding

Capital funding assistance provided through the IAH-E and OPHI will be tailored to meet specific project conditions. Project funding will be structured as a forgivable loan with a minimum 25-year term.

IAH-E and OPHI funding will generally be provided up to a maximum of $135,000 per unit. Subject to demonstrated need and availability of funding, funding up to a maximum of $150,000 may be considered for projects with large units (four or more bedrooms), supportive housing projects and other projects with exceptional circumstances. Preference will be given to proposals that achieve the Affordability Targets of this RFP with a per unit funding allocation at considerably less than the maximum eligible funding limit.

The IAH-E and OPHI will fund up to 75 per cent of the total capital cost per unit or the maximum funding per unit, whichever is less. Total capital costs include land, financing, hard (construction) and soft costs. For example:

15 unit project of 1 bedroom units
Total Capital Cost of $3,750,000
Total Capital Cost per unit = $3,750,000 ÷ 15 = $250,000
IAH funding per unit is the lesser of:
(a) 75% of $250,000 = $187,500 or
(b) $135,000

The maximum funding per unit would be $135,000.

The total maximum IAH-E and OPHI funding for the project will be $2,025,000.

Funding under the IAH-E and OPHI will be advanced in stages during construction based on achieving predetermined milestones.

All units receiving IAH-E and OPHI capital funding must have an overall average rent level of no more than 80 per cent of the CMHC AMR.
Subject to availability, grants to offset Regional Development Charges may be made available to selected proponents. Based on the timing of the application for building permit and registration of the Contribution Agreement, the grant for the RDCs may be available at the time of issuance of the building permit. Otherwise the approved proponents will be reimbursed for the amount of the RDCs once the Contribution Agreement is registered.

Funding assistance and allotment to successful proponents will be subject to recommendations made by Regional staff and approval by Regional Council and the Province of Ontario.

Applicants are encouraged to consider applying online to the CMHC National Housing Co-Investment Fund (https://www.cmhc-schl.gc.ca/en/nhs/co-investment-fund---new-construction-stream) as possible sources of funding to improve the affordability and viability of potential projects. Further details are available through this link as well.

Proponents will be required to obtain a performance bond and labour and material payment bond from the General Contractor as per the Contribution Agreement.

The Carpenters Union certification is not applicable to this RFP.

3. PROPOSAL COMPONENTS

The Proponent shall ensure the Proposal is:

- Complete and provides all of the required information and documentation;
- Provides all information in the form requested; and
- The Proposal is received at the appropriate office no later than the identified deadline.

If the Proponent has any questions related to the Proposal Components, they may contact the Procurement Office in writing through Tina’s email (TReay@regionofwaterloo.ca) prior to the identified deadline with any questions or requests for clarification.

1) Cover Letter

- The Proponent is encouraged to provide a covering letter with their submission.
- The cover letter should be no more than one (1) page, single spaced, 12 point font, standard one (1) inch margins and signed by a duly authorized officer of the Proponent providing a brief executive summary to the Proposal.

2) Main Submission

Proposals must be no longer than 15 pages (excluding supporting documentation included in appendices) and must include the following information:

- Proponent details: lead contact and contact information, proponent background and expertise in developing and managing affordable rental housing, including examples and 3 professional references for past projects;
• Provide proof of incorporation: if not currently incorporated, proponents must be confirm that if successful, they will incorporated prior to entering into a contribution agreement;

• Description of professional team and proposed roll in this project: development, financial, legal, consulting, architectural services, planning services, property management, etc. (include examples of previous projects and resumes);

• Partnerships (any other agencies, other program funding, identify roles and responsibilities and include letter/memorandum of understanding between the partners);

• Proposal details: rationale, how the proposed project will help create sustainable affordable housing, target client group(s) number of units designated to households from the centralized waiting list for Community Housing, property management details;

• Site details and readiness: ownership status, site location and description, surrounding uses and proximity to services and amenities, potential environmental/contamination issues, official plan designation, current zoning, status of site plan approval and building permit, and any municipal or environmental approvals required;

• Project concept: building and unit size and type, design considerations and rationale in relation to the client target group, building standards that will exceed the norm as defined by the current Ontario Building Code, energy efficiency provisions, accessibility and VisitAble features and standards (include any plans and drawings);

• Apprentices or Employment Opportunities Partnership Plans: how the proponent will ensure that apprentices, un/under employed individuals and/or incorporate youth employment opportunities during construction are provided with opportunities to work on the project and how this will be tracked and reported;

• Project Viability: provide a feasibility analysis and potential benefits and risks;

• Proof of proponent equity contribution (funding, property, in-kind, etc.); please note that private sector proponents must contribute at least 10 per cent equity (for IAH-E only) and private/non-profit partnerships must make a 4 per cent equity contribution;

• Confirmation of other capital funding, if applicable;

• Evidence of financial competence: demonstrate the capacity and financial capability to undertake the proposed development, including at a minimum, copies of the two most recent audited financial statements of proponent and any partners (if audited financial statements are not available, additional information to substantiate or establish liquidity and debt management is required such as a statement of net worth, unaudited financial statements, consolidated financial statements and/or most recent tax return);
Appendix A – Sample Contribution Agreement

- Mortgage financing details: expected amount, interest rate and amortization, and letter from lender indicating interest or commitment in financing the project (commitment can be conditional on obtaining program funding);

- Proposed rents and amount for extra charges (e.g. parking, storage) in relation to Affordability Targets referenced in this RFP (if any utilities are to be paid by the tenants, the proponent must propose rent reductions and rationale for amount of adjustment);

- Development schedule (include an implementation plan and schedule, estimating the key milestone dates, as applicable, for site acquisition, site plan approval, Phase I and II ESA, Record of Site Condition, demolition permit, building permit approval, construction start and occupancy); and

- Supportive housing details, if applicable: client target group need, support services to be provided, written confirmation of support funding, and support service operating budget.

3) Site Information, Proposed Unit Count, Capital and Operating Budget forms (Appendix B)

Proponents shall complete the forms included in Appendix B and include in the submission. It is recognized that some proponents may wish to submit more than one option for a property in response to this RFP. In such cases a separate Appendix B must be submitted for each option and enclosed in the same envelope as the main proposal. These alternate proposals must be clearly identified as alternates and will be submitted under the conditions of this RFP.

4) Signing Sheet (Appendix C)

The Proponent shall complete the “Signing Sheet” contained in Appendix C and ensure it is signed by a duly authorized officer/director to bind the organization/business.

5) Envelope Template (Appendix D)

The Proponent shall complete the template contained in Appendix D and attach it to the outside of the front of the sealed envelope or package.
APPENDIX A

SAMPLE CONTRIBUTION AGREEMENT

(To be downloaded as separate document – 49 pages)
APPENDIX B
PROJECT INFORMATION/FUNDING BUDGET FORMS
<table>
<thead>
<tr>
<th>Proponent Name</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of Proposal (Construction-Ready or Conceptual)</td>
<td></td>
</tr>
<tr>
<td>Municipal Address</td>
<td></td>
</tr>
<tr>
<td>Official Plan Designation</td>
<td></td>
</tr>
<tr>
<td>Zoning Designation</td>
<td></td>
</tr>
<tr>
<td>Site Area</td>
<td></td>
</tr>
<tr>
<td>Surface Parking Spaces</td>
<td></td>
</tr>
<tr>
<td>Enclosed Parking Spaces</td>
<td></td>
</tr>
<tr>
<td>Total Gross Floor Area</td>
<td></td>
</tr>
<tr>
<td>Net Residential Floor Area</td>
<td></td>
</tr>
<tr>
<td>Net Non-residential Floor Area</td>
<td></td>
</tr>
</tbody>
</table>

### Proposed Unit Count

<table>
<thead>
<tr>
<th>Bedroom Type</th>
<th>Unit Size (m²)</th>
<th>Number of Affordable Units (IAH/OPHI Capital Funded at or below AMR)</th>
<th>Number of Market Rent (Not IAH/OPHI Capital Funded)</th>
<th>Total Number of Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Bedroom</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Bedroom</td>
<td></td>
<td></td>
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<tr>
<td>3 Bedroom</td>
<td></td>
<td></td>
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<tr>
<td>4+ Bedroom</td>
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<tr>
<td>Total</td>
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</table>

### Funding Consideration

<table>
<thead>
<tr>
<th>Funding</th>
<th>Amount</th>
<th>Consideration</th>
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<tbody>
<tr>
<td>IAH-E</td>
<td>$1,799,410</td>
<td>Yes/No</td>
</tr>
<tr>
<td>OPHI</td>
<td>$3,599,883</td>
<td>Yes/No</td>
</tr>
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</table>
## CAPITAL BUDGET

<table>
<thead>
<tr>
<th>Budget Item</th>
<th>Affordable Units</th>
<th>Market Rent/Non-Residential Space</th>
<th>Combined Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land Cost</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Land Transfer Tax</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Environmental/Geotechnical</td>
<td></td>
<td></td>
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<tr>
<td>Remediation/Site Clean-up</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Survey</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appraisal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Land Cost:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>SUBTOTAL</strong></td>
<td></td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Budget Item</th>
<th>Affordable Units</th>
<th>Market Rent/Non-Residential Space</th>
<th>Combined Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal Fees</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning Approvals</td>
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<td></td>
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<tr>
<td>Building Permit Fees</td>
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</tr>
<tr>
<td>Development Charges</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parkland Levy</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning/Development Consultant</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Architect/Engineers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mortgage Fee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quantity Surveyor</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Mortgage Insurance Application Fees</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Interest during Construction</td>
<td></td>
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<tr>
<td>Insurance during Construction</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taxes during construction</td>
<td></td>
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</tr>
<tr>
<td>Audit (required)</td>
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<tr>
<td>Other Soft Cost:</td>
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<td></td>
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<tr>
<td><strong>SUBTOTAL</strong></td>
<td></td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Budget Item</th>
<th>Affordable Units</th>
<th>Market Rent/Non-Residential Space</th>
<th>Combined Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction/Renovation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Furnishings &amp; Equipment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stoves &amp; Refrigerators</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parking &amp; Landscaping</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LEEDS/Energy Efficiency Features</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contingency</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Construction Costs</td>
<td></td>
<td></td>
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</tr>
<tr>
<td><strong>SUBTOTAL</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Net HST</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL CAPITAL COST</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Budget Item</td>
<td>Affordable Units</td>
<td>Market/Non-Res. Space</td>
<td>Combined Total</td>
</tr>
<tr>
<td>----------------------------------------------------------------------------</td>
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<td>---------------</td>
</tr>
<tr>
<td>Proponent Equity – Source:__________</td>
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<tr>
<td>Proponent Equity – Source:__________</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>IAH-E/OPHI Funding</td>
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</tr>
<tr>
<td>CMHC Co-Investment Contribution (Grant)</td>
<td></td>
<td></td>
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<tr>
<td>Regional Development Charges Grant</td>
<td></td>
<td></td>
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<tr>
<td>Area Municipal Funding</td>
<td></td>
<td></td>
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<tr>
<td>Mortgage</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Other Funding – Source:__________</td>
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<tr>
<td>Other Funding – Source:__________</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td></td>
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</table>
## ANNUAL OPERATING BUDGET

### REVENUE

<table>
<thead>
<tr>
<th>Affordable Units</th>
<th>Market Rent/Non-Res. Space</th>
<th>Combined Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor: Number</td>
<td>@ $</td>
<td></td>
</tr>
<tr>
<td>Bachelor: Number</td>
<td>@ $</td>
<td></td>
</tr>
<tr>
<td>( ) Bedroom: Number</td>
<td>@ $</td>
<td></td>
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<tr>
<td>( ) Bedroom: Number</td>
<td>@ $</td>
<td></td>
</tr>
<tr>
<td>( ) Bedroom: Number</td>
<td>@ $</td>
<td></td>
</tr>
<tr>
<td>( ) Bedroom: Number</td>
<td>@ $</td>
<td></td>
</tr>
<tr>
<td>( ) Bedroom: Number</td>
<td>@ $</td>
<td></td>
</tr>
<tr>
<td>Laundry Revenue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parking Revenue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Revenue:</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL REVENUE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less: Vacancy Allowance</td>
<td></td>
<td></td>
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<tr>
<td>Less: Other:</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>NET REVENUE</strong></td>
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<td></td>
</tr>
</tbody>
</table>

### EXPENSES

<table>
<thead>
<tr>
<th>Affordable Units</th>
<th>Market Rent/Non-Res. Space</th>
<th>Combined Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hydro</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Heating</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Water</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Utilities Common Area</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintenance &amp; Elevator</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Garbage</td>
<td></td>
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</tr>
<tr>
<td>Snow Removal</td>
<td></td>
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<tr>
<td>Insurance</td>
<td></td>
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<tr>
<td>Audit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal, Banking, Office Costs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Management Fees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Municipal Taxes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Replacement Reserves</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Principal &amp; Interest Mortgage Payments</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL EXPENSES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>SURPLUS (SHORTFALL)</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
APPENDIX C
FORM OF PROPOSAL/SIGNING SHEET
APPENDIX C - Signing Sheet

I/We acknowledge and have carefully examined the instructions, terms and conditions and specifications regarding this RFP. The Proponent by submitting this Proposal confirms they have completed this Proposal in accordance with the terms and conditions of this RFP 2019-18 New Affordable Rental Housing.

The Proponent hereby agrees that any information provided in this Proposal, even if it is identified as being supplied in confidence, may be disclosed where required by law or by order of a court or tribunal. The Proponent hereby consents to the disclosure, on a confidential basis, of this proposal by the Region to the advisers retained by the Region to advise or assist with the RFP process, including with respect to the evaluation this Proposal.

Signer(s) must have authority to bind the business/organization.

Signed, and delivered at ______________________ this ___ day of __________ 2019.

Municipality ______________________ Month ______________________

Legal Company Name ____________________________________________

Address _______________________________________________________

Number and Street __________ Municipality/City __________ Province __________ Postal Code __________

Signature of ______________________ Name ______________________

(Authorized official or principal who has authority to bind the company) Print or Type

Title ______________________ Email ______________________

Telephone Number ______________________ Fax Number ______________________

Signature of ______________________ Name ______________________

(Authorized official or principal who has authority to bind the company) Print or Type

Title ______________________ Email ______________________

Telephone Number ______________________ Fax Number ______________________
APPENDIX D
ENVELOPE TEMPLATE
PROPOSAL SUBMISSION
SUBMITTED BY
Company Name:
Address:

REGION OF WATERLOO
TREASURY SERVICES DIVISION (PROCUREMENT)
150 FREDERICK STREET, 4TH. FLOOR
KITCHENER, ONTARIO
N2G 4J3

IMPORTANT:
Bids are to be dropped off at the Treasury Services Division (Procurement) Counter, 150 Frederick Street, 4th Floor, Kitchener, ON. Submissions received in Treasury Services Division (Procurement) after the closing time will NOT be accepted. The onus is on the bidder to ensure that the bid is received in the proper location and before the closing time.

CONTRACT NUMBER: P2019-18
CONTRACT NAME: New Affordable Rental Housing
CLOSING DATE: Thursday, August 15, 2019
CLOSING TIME: 2:00:59 p.m.