



Surplus
School Site
**Program
Guide:
Appendix II**

Fall 2024

City of Edmonton
Housing Action Team & Real Estate
edmonton.ca/SurplusSchoolSitesListings

Appendix II: Application Submission Information

Refer to [Appendix I Application Submission Checklist](#) for the mandatory application requirements.

Appendix II is a detailed explanation of the application requirements.

The information provided in Appendices I and II will form the basis of the City's holistic review for the land sale agreement and the grant funding request on the surplus school sites.

All submissions should be sent in a PDF format to PropertySales@edmonton.ca with an email subject that reads: "Surplus School Site - Submission"

For submissions relating to a portfolio of sites (i.e. more than one site), applicants are encouraged to submit a single application package.

1. Covering Letter:

Provide a letter including the following details:

- a. Summary of proposed project
- b. Whether pursuing a non market rate sale or lease
- c. Site(s) being applied for
- d. Written confirmation as to whether the Applicant is constructing the development itself, or alternatively, the name of the contracted builder or developer involved in the construction of this development
- e. All partnerships shall be clearly documented through a Partnership Agreement, memorandum of understanding or a letter of intent signed by the named applicant and the partner(s)
- f. Primary contact information

2. Applicant Information

a. Applicant's incorporation or constating documentation:

- i. Guarantor's incorporation or constating documentation (if applicable)

b. Experience: A description that outlines the experience of the Applicant, and any entity to be retained by the Applicant for the proposed development, in the operation and property management of affordable housing developments, including:

- i. Number of years of management experience
- ii. Description of existing properties owned and managed by the Applicant, including whether operating affordable housing and at what level of affordability
- iii. Provide a copy of a Corporate/Non-profit Registry Search on the applicant and any partnering organization
Information on the professional organizations associated with the building design and construction.

c. Applicant's audited financial statements for the previous three years

If the audited financial statement is not available at the time of application, a Review Engagement Report or alternative method of determining financial health may be accepted at the sole discretion of the City during the application stage. Note: the City will require an audited financial statement that is satisfactory to the City prior to execution of the affordable housing agreement.

- i. If the Applicant does not have three years of financial history, as evidenced by Audited Financial Statements or at the discretion of the City, the City may require a third party guarantor to provide financial backing through a Guarantee Agreement with the City. If using a guarantor, the following supporting documentation is required:
 - A letter signed by the guarantor(s) confirming their willingness to enter into a Guarantee Agreement with

the City of Edmonton should your Surplus School Site application be approved,

- Copies of annual financial statements for the previous three years (if a corporate entity),
- A copy of a Corporate/Non-profit Registry Search (if a corporate entity), and
- Copies of bank statements for the previous three months confirming the guarantor has sufficient funds to repay the total grant funding requested from the City.¹

3. Proposed Development Information

If proposing on multiple sites as a portfolio, all information below should be provided on a per-site basis. If seeking to meet or exceed minimum requirements throughout the portfolio as opposed to on each site please provide a consolidated summary.

Submit a detailed description of the proposed development intentions, including:

- a. The name of each site you would like to develop on
- b. The affordable housing component and any market housing or commercial component
- c. Built form
- d. Number of units and breakdown by bedroom composition, unit size and rental rate
- e. Target market (i.e. demographic(s) serve; seniors, new immigrants, etc) and occupant selection including how ongoing tenant eligibility criteria will be monitored. Please indicate if the target market is solely based on income.
 - i. Indicate whether occupants will be self-referred or selected through coordinated intake, Applicant organization's waiting list, or referred by others /eligibility criteria, etc.
 - ii. It is mandatory that the annual household income of affordable housing occupants be below the income threshold limits set out by the [City of Edmonton Maximum Allowable Rental Rates \(MARR\) & Maximum Average Income Thresholds](#)
- f. Development timeline, including but not limited to:

¹ Guarantor details added to guide based on questions from potential applicants

- i. Development permit submission
- ii. Building permit submission (with approval by September 2026)
- iii. Construction start
- iv. Occupancy
- g. Cost Estimates: Class D Quantity Survey Report or cost consultant certified report. If neither are available at the time of application, a breakdown of forecasted costs provided by a certified architect, engineer or general contractor may be accepted at the sole discretion of the City.
**Note: If a project moves forward for selection and is seeking an affordable housing grant contribution, a cost consultant certified report will be required prior to execution of the Affordable Housing Agreement.*
- h. Confirmation of other funding sources and/or financing (if applicable): Written proof of each lender or funder's commitment to the proposed development, including the intended funding amounts and any conditions.
- i. Confirmation of equity: Written confirmation that 5% of the total cost of the proposed development will be provided by the Applicant or the Guarantor² as equity, except in special cases as determined and documented at the discretion of the Director level of the area implementing the Surplus School Site Program Guide. Contact kyle.payne@edmonton.ca and CC: affordablehousing@edmonton.ca to discuss special cases.
- j. Prospective grant contribution from the City of Edmonton: Grant contributions should be expressed as a dollar value and as a percentage of total costs to construct the proposed affordable housing units, inclusive of land value. To identify the market value of your prospective Surplus School Site(s) please see Attachment 2
- k. Affordable housing agreement terms: Number of years, minimum of 25, that the development's affordable units will remain affordable.
 - i. Rental developments: At minimum, 30% of total residential units must be affordable housing units. Affordable units must have:

² See Note 1

1. rent payments that do not exceed 80% of average market rental rates as determined by the City, which utilizes CMHC average rental rates where available, OR
 2. rent-geared-to-income with rent payments that do not exceed 30% of the occupant's gross household income. Refer to the current year's [City of Edmonton Maximum Allowable Rental Rates \(MARR\) & Maximum Average Income Thresholds](#).
- ii. Affordable homeownership developments: State the percentage of units that will be affordable homeownership, the level of affordability (as a percentage below market rates) and describe the model outlining how ownership would be permitted while maintaining long-term affordability and the Applicant's involvement in the model, such as through a buy-back option or otherwise.
- I. Environmental/Energy Efficiency Features achieved by the proposed development, including the planned NEBC/NBC tier and/or any third party environmental certification (e.g. LEED, Passive House) that will be achieved
 - m. Accessibility Standards achieved by the proposed development: Developments must meet minimum accessibility requirements of the National Building Code 2023 Alberta Edition. Developments that provide barrier-free common areas, universal design, or accessible units are preferred.
 - i. State the number of Accessible Dwelling Units, if any
 - ii. State the total number of units that will be Adaptable Dwelling Units in accordance with National Building Code 2023 Alberta Edition 3.8.4
 - iii. If applicable, provide a description of the details of the proposed accessibility strategy within each unit (refer to [CMHC Minimum Environmental & Accessibility Requirements - New Construction](#) Table A) and identify the barrier-free features, from the approach to the building through the common areas and into the accessible units (refer to [CMHC Minimum Environmental & Accessibility Requirements - New Construction](#) Table B)
 - iv. Description of Universal Design achieved by the proposed development

1. State whether or not common areas will be barrier-free.
 2. If applicable, provide a narrative of the details of the proposed universal design strategy within the dwelling units and throughout the common areas (refer to [CMHC Minimum Environmental & Accessibility Requirements - New Construction](#) Table C)
- n. Programs and services provided, if any: This description could include property management strategies, any on site or delivered support services, collaborations with other social service agencies, etc.
 - o. Commercial or community amenity spaces: If commercial uses or community amenity spaces that fit the zone of the site are contemplated, please describe their proposed use and expected impacts to revenue / expense of the overall project.
 - p. **Financial Assessment** Completed copy of the linked sheet. Consideration will be given to the financial strength of the organization, capital and funding plan, and operating budget.

*Note: the City of Edmonton may share your development details with other orders of government.

4. Drawings

Must include:

- a. Site Plan (mandatory)

Not mandatory in initial submission but may be requested if an Applicant is selected to proceed:

- a. Landscape Plans
- b. Floor Plans
- c. Elevation Drawings

5. Communications and Engagement Approach

The City focuses on information sharing and relationship building with neighbours, community leagues, and homeowners' associations as early in the process as possible. Provide a description of your communications and engagement approach with the local community.

6. Support Letters (optional)

If available, applicants are encouraged to provide copies of applicable letters of support from financial institutions, financiers or other levels of governments, but not required.