

Seniors Housing Development

PILOT INVITATION FOR SUBMISSIONS:

The City of Edmonton is requesting innovative submissions for either or both of the described City owned sites below for the purpose of developing long term affordable housing for seniors:

- Miller Site: 3.308 acres of RA7 zoned land in the established Community of Miller, situated at 4910 Matheson Way NW, Edmonton ([Appendix A: property information \[LINK\]](#))
- Overlanders Site: 3.19 acres of RA7 zoned land in the established Community of Overlanders, situated at 12770 Victoria Trail NW, Edmonton ([Appendix B: property information \[LINK\]](#))

The City of Edmonton's primary goal is to have the properties developed with a high quality, sustainable and affordable Seniors housing project that meets the criteria and intent of City Policy C583 "Policy Directions for 2009 Surplus School Sites.", Attached as [Appendix C. \[LINK\]](#).

This Property Offering and Invitation for Submissions is open to Senior Housing Providers/Developers (Profit and Non-profit) with a successful history of providing and operating high quality sustainable, mixed income Seniors housing projects. The sites are available for purchase based on the terms and conditions stated in Appendix A and B.

The City's preference is to sell the sites, however if no suitable purchase submissions are received, the City may also consider entering into a long term lease with a developer/operator.

The City reserves the right at its discretion, to accept, reject or further negotiate with any or all applicants and/or cancel or modify this offering.

SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA:

The following information must be included in the Submission:

1. **Price Offered (please indicate which property(ies) the offer is for) :**
2. **Project Development Time Schedule:**
 - Provide a detailed schedule of the Project's proposed development commencement and completion time lines.
3. **Target Market:**
 - Owner occupied or tenanted
 - Income range of clients
 - If a rental project, outline of rental structure.
 - Eligible projects will be for seniors capable of living independently, that will include:
 - Independent Living



Miller – Appendix A



Overlanders – Appendix B

Seniors Housing Development

SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA: (con't)



Miller – Appendix A



Overlanders – Appendix B

- Supportive Living Level 1 (SL1)
- Supportive Living Level 2 (SL2)
- Supportive Living Level 3 (SL3)
- Project types that will NOT be considered include:
 - Supportive Living 4 (SL4)
 - Designated Supportive Living 4
 - Designated Supportive Living, Mental Health (SL4-MH)
 - Designated Supportive Living, Dementia (SL4-D)

4. Project Description to include:

- Confirmation that the project complies with existing zoning (Note: the City will not consider submissions that contemplate rezoning).
- Form of Housing which could include among others, aging in place, accessible and/or adaptable units.
- Number of units, including a breakdown of non-market and market units.
- Unit configuration, including any innovation that demonstrates a mix of unit types and affordability levels.
- How the architectural and landscape features of the proposed project will conform with the overall housing forms in the immediate area to ensure physical form compatibility.

5. Long Term Affordability:

- Affordability is to be defined by the 2016 Core Need Income Thresholds (CNIT).
- Description of how the organization/team will ensure long term affordability of the seniors' non-market housing component (50 years), of the minimum 50% to a maximum of 75% of the total units developed, for non-market housing (as defined in Policy C583 "Clause 3". A goal of non-market housing is to ensure its long term affordability with a target of 50 years following issuance of an occupancy permit").

6. Community Consultation and Ongoing Relations:

- Outline a community consultation process that demonstrates how local residents will be engaged in the design of the physical built form of the project, including how the community will be included in at least one design charrette.
- Demonstrate how the organization will develop an ongoing and effective working relationship with existing adjacent homeowners.

7. Financial Viability:

- Provide a complete project development pro forma.
- Demonstrate the marketability of the market units, including comparable sales prices and rental costs.
- State organization's financial contribution to the project.
- Identify any partnerships or cooperation with other agencies, other levels of government or the private sector, including leveraging of funds.
- State all funding sources (whether available now or proposed) and the amount from each.
- If the housing project requires provision of support for residents, the proponent must outline how the support service will be provided, and include any available letters of support from recognized Professional bodies or service delivery agencies in this regard.

The information contained herein is believed to be true, but does not constitute a contract. Buyers should verify all information to their own satisfaction. Price, terms and conditions are subject to change without notice. GST is not included in price.

Seniors Housing Development



Miller – Appendix A



Overlanders – Appendix B

- Provide evidence of secured funding or a letter of mortgage approval, if available.
 - Provide a long term Business Plan identifying the financial sustainability of the proposed project.
- 8. Applicant Qualifications:**
- Provide organizations company/team structure including a list of Board members, with their respective credentials.
 - Provide comprehensive list of all Consultants, Contractors, Architects, etc. to be involved in the project.
 - Provide list of previous Seniors Housing projects demonstrating experience in both developing and operating long term mixed income and sustainable projects.
 - Provide latest audited financial statement.
 - Provide Organizations three year business plan.
- 9. MLS Listed**
- These property are listed for sale on MLS.
 - Buyers must acknowledge the involvement or assistance of any Licensed Real Estate Brokers.

SUBMISSION EVALUATION CRITERIA:

Submissions will be evaluated based on the above Submission Requirements. The Real Estate and Housing Branch of the Sustainable Development Department will evaluate all submissions in consultation with the Corporate Services Department. The decision of the Real Estate and Housing Branch regarding the selection of any submission or submissions for further negotiation will be final.

SUBMISSION REQUIREMENTS AND QUESTIONS

Applicants are encouraged to register their interest in these properties by sending an e-mail to buildinghousingchoices@edmonton.ca. In the interest of fairness, and to ensure all applicants receive the same information, all questions must be submitted in writing to the stated e-mail only.

The identity of the Applicants submitting the questions will be kept confidential. Periodic emails will be sent to those who have registered their interest in this Invitation for Submissions to answer all questions received. All questions must be received by 4:00 p.m. February 15th, 2017. All answers will be provided by February 22nd, 2017.

The deadline for receiving four (4) copies of the submissions is 4:00 p.m. February 28th, 2017. Submissions must be received at the following address:

Attention: Maurice Rachwalski, Director of Housing
 City of Edmonton
 10th Floor, Edmonton Tower
 10111 – 104 Avenue NW
 Edmonton, Alberta T5J 0J4

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Miller – Seniors Housing Development



4910 Matheson Way NW

Neighbourhood: Miller

Sale Land Legal Description: Lot 1, Block 2, Plan 1622836

Land Area: 144,097 SqFt / 3.308 Ac (more or less)

Existing Land Use Zone: [RA7 Low Rise Apartment \[LINK\]](#)

MLS Number: E4046138

Last Update: December 20, 2016

Tax Roll Number(s): 10785156

Sector: Northeast

[COLOUR AERIAL PHOTO - DOWNLOAD \[LINK\]](#)

Annual Local Imp. Charges: NIL

Estimated Local Imp. Payout: NIL

Price Per Square Foot: \$18.39

Estimate of 2016 Taxes: \$28,980.64 land only
(subject to verification by Assessment & Taxation)

\$2,650,000 Asking Price



Other Information:

The subject land is serviceable from existing lines, however additional upgrading may be required dependent on future development. The Buyer is to satisfy themselves with the acceptability of the existing servicing and will be responsible for any additional servicing costs, if required.

Conditions of Sale and Development:

1. All sales must be approved by the General Manager of Sustainable Development and/or Executive Committee of City Council.
2. The Buyer will be required to submit a deposit cheque in the amount of 10% of the purchase price upon execution of a sale and development agreement.
3. The Buyer will be required to enter into a Sale and Development Agreement and a Buy Back Option Agreement for a Seniors Housing Development. The Buyer may be required to execute a Restrictive for the Seniors Housing Development.

Miller – Seniors Housing Development



Conditions of Sale (con't)

4. The Buyer must commence construction of the Senior Housing development within one (1) year of the Closing Date and complete construction within three (3) years of the Closing Date.
 5. The Sale and Development Agreement will contain, among other things, a performance fee of 10% of the purchase price.
 6. The Sale and Development Agreement will require a [Leadership in Energy and Environmental Design "Certified" \(LEED\) \[Link\]](#) or [Built Green Silver \[Link\]](#) accredited development be constructed on the site.
 7. The Buyer will be required to conduct a community design and engagement process to inform the local community of the proposed development, as a condition of the sale, to both the Buyer's and the City's satisfaction.
 8. The property is being sold on a strictly "as is, where is" basis. Any representations or information regarding the size, configuration, dimensions, zoning, utility services, environmental quality/liability, soil conditions or develop ability with respect to the property are taken and relied upon at the Buyer's sole risk and the Buyer has the obligation of ascertaining the accuracy of all such information.
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Purchase Process:

1. This property has just been listed for sale on MLS in a competitive public offering.
 2. In order to give all interested buyers an equal opportunity, **all submissions received will be held until 4:00 p.m. February 28th, 2017.** After that time, the City will contact the buyer(s) which the City selects, to further negotiate and formalize a Sale and Development Agreement.
 3. Buyers must acknowledge the involvement or assistance of any Licensed Real Estate Brokers in their submission.
 4. The City of Edmonton reserves the right at its discretion, to accept, reject or further negotiate any submission received and/or cancel or modify this offering.
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Overlanders – Seniors Housing Development



12770 Victoria Trail NW

Neighbourhood: Overlanders
Sale Land Legal Description: Lot 12, Block 37, Plan 8821052
Land Area: 138,948 SqFt / 3.19 Ac / (more or less)

Existing Land Use Zone: [RA7 Low Rise Apartment \[LINK\]](#)

MLS Number: E4046139

Last Update: December 20, 2016
Tax Roll Number(s): 4025391
Holding Number: 926717
Sector: Northeast

[COLOUR AERIAL PHOTO - DOWNLOAD \[LINK\]](#)

Annual Local Imp. Charges: NIL
Estimated Local Imp. Payout: NIL
Price Per Square Foot: \$18.00
Estimate of 2016 Taxes: \$14,563.33 land only
(subject to verification by Assessment & Taxation)

\$2,500,000 Asking Price



Other Information:

The subject land is serviceable from existing lines, however additional upgrading may be required dependent on future development. The Buyer is to satisfy themselves with acceptability of the existing servicing and will be responsible for any additional servicing costs if required.

Conditions of Sale: and Development:

1. All sales must be approved by the General Manager of Sustainable Development and/or Executive Committee of City Council.
2. The Buyer will be required to submit a deposit cheque in the amount of 10% of the purchase price upon execution of a sale and development agreement.
3. The Buyer will be required to enter into a Sale and Development Agreement, and a Buy Back Option Agreement for a Seniors Housing Development. The Buyer may be required to execute a Restrictive covenant for the Seniors Housing development.

Overlanders – Seniors Housing Development



Conditions of Sale (con't)

4. The Buyer must commence construction of the Seniors Housing development within one (1) year of the Closing Date and complete construction within three (3) years of the Closing Date.
 5. The Sale and Development Agreement will contain, among other things, a performance fee of 10% of the purchase price.
 6. The Sale and Development Agreement will require a [Leadership in Energy and Environmental Design "Certified" \(LEED\) \[Link\]](#) or [Built Green Silver \[Link\]](#) accredited development be constructed on the site.
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Appendix C



CITY POLICY

POLICY NUMBER: C583

REFERENCE:

City Council 7 July 2015

ADOPTED BY:

City Council 7 July 2015

SUPERSEDES:

New

PREPARED BY: Sustainable Development

DATE: 30 June 2015

TITLE: Guidelines for Development of the 2009 Surplus School Sites

Policy Statement:

Recognizing the significant need for non-market housing in the City, the City will use the following guidelines to develop surplus school sites for residential uses: unless otherwise exempted by Council:

1. Non-market housing will comprise 50% to 75% of the residential units built on surplus school sites, and the remaining residential units will be market housing.
2. Wherever reasonably possible, residential developments on surplus school sites will be located on the portion of the site that was originally designated for the school. Where Administration finds that economics permit and improved community outcomes can be achieved, the equivalent area may be allocated elsewhere within the adjacent green space with Council's approval.
3. A goal of non-market housing is to ensure its long term affordability with a target of 50 years following issuance of an occupancy permit.
4. Non-market housing units will not be visually distinguishable from the market units in the development.
5. Developments in surplus school sites will be medium density developments including row housing, medium density multiple family, or low rise apartments (currently zoned as RF5, RF6, and RA7, respectively), with not less than 40 residential units per hectare of residential development.
6. None of the developments will include single detached housing.
7. Developments may include ancillary uses that benefit the residential development and the wider community.

The purpose of this policy is to:

Establish guidelines for residential development on Surplus School Sites that maximize economic viability, public benefits, and connections to the communities in which the new developments are located, while remaining flexible enough to respond to local conditions and community needs.

This policy is subject to any specific provisions of the Municipal Government Act or other relevant legislation or Union Agreement.