



# Innovation and Research *NHS Demonstrations Initiative*

## APPLICANT GUIDE



# TABLE OF CONTENTS

<b>SECTION 1 – GENERAL INFORMATION</b>	<b>4</b>
1.1 Overview of Section 1	4
1.2 Initiative Introduction	4
1.3 CMHC Background	4
1.4 National Housing Strategy (NHS) Overview	4
1.5 Initiative Overview	5
1.6 Application Intake Process (AIP)	5
<b>SECTION 2 – APPLICATION AND SUBMISSION INSTRUCTIONS</b>	<b>6</b>
2.1 Overview of Section 2	6
2.2 Submission Instructions and Deadline (Mandatory)	6
2.2.1 Language of Application	6
2.2.2 Applicants’ Attestation (Mandatory)	6
2.2.3 Delivery Instructions and Deadline	6
2.2.4 Application Opening, Verification Period, and Deadlines	7
2.2.5 Inquiries	7
2.2.6 Communication	8
2.2.7 Applicant Contact	8
2.2.8 Offering Period (Mandatory)	8
2.2.9 Changes to Application	8
2.2.11 Verification of Applications	9
2.2.12 Ownership of Responses	9
2.2.14 Corporation Identification	10
2.2.15 Declaration With Respect to Gratuities	10
2.2.16 Conflict of Interest	10
2.2.17 CMHC’s Obligations	11
2.2.19 Indemnification and Insurance Requirements	11
<b>SECTION 3 – APPLICANTS’ GUIDE</b>	<b>11</b>
Application Form – Section 1: General Information	11
Application Form – Section 1.1: Eligible Applicants	12
Application Form – Section 1.1: Demonstration Initiative Eligible Timeframe	12
Application Form – Section 1.2: Eligible Partnerships And Collaborators	12
Application Form – Section 1.3: Funding Requests From Other Organizations	13
Application Form – Section 2: Project Details	13
Application Form – Section 2.1: Demonstration Project Objective	15
Application Form – Section 2.2: Demonstration Project Description	15
Application Form – Section 2.3: Team Members	17
Application Form – Section 2.4: Project Activity Summary	18
Application Form – Section 2.5: Knowledge Dissemination Plan	18

Application Form – Section 3: Project Funding .....	19
Application Form – Section 3.1: Project Costs. ....	19
Application Form – Section 3.2: Proposed Funding Contributions .....	19
Application Form – Section 4: Project Relevance. ....	20
Application Form Section 4.1: NHS Priority Area .....	20
Application Form Section 4.2: NHS Priority Population. ....	20
Application Form Section 4.3: Project Alignment with NHS Priority Areas and Desired Outcomes. ....	20
Application Form – Section 5: Affordable Housing Sector Impacts. ....	21
Application Form – Section 6: Project Risks .....	22
<b>APPENDIX 1 – NATIONAL HOUSING STRATEGY PRIORITY AREAS .....</b>	<b>23</b>
<b>APPENDIX 2 – EXAMPLE OF DEMONSTRATION COST BREAKDOWN. ....</b>	<b>24</b>

**Use of Information & Disclaimer:** Information contained in this Applicants' Guide (Guide) is proprietary information to CMHC. It is made available and shall be used for the sole purpose of providing applicants with sufficient information to prepare responses to the Demonstration application process. You shall not make any other use of the information contained in this Guide.

## SECTION 1 – GENERAL INFORMATION

### 1.1 Overview of Section 1

The purpose of this section is to provide general information about Canada Mortgage and Housing Corporation (CMHC) and this solicitation for demonstration projects, tasks and activities.

### 1.2 Initiative Introduction

CMHC wishes to enter into a **Contribution Agreement(s)** with an applicant(s) to the **NHS Demonstrations Initiative** (hereafter referred to as the “applicant”) for the purpose of providing a demonstration platform to showcase innovative technologies, practices, policies, programs and strategies in the affordable housing sector that are aligned with the priority areas and vulnerable populations of Canada’s **National Housing Strategy (NHS)**.

### 1.3 CMHC Background

CMHC is the Government of Canada’s National Housing Agency, with a mandate to help Canadians meet their housing needs. As Canada’s authority on housing, we contribute to the stability of the housing market and financial system, provide support for Canadians in housing need, and offer objective housing research and advice to Canadian governments, consumers and the housing industry. Prudent risk management, strong corporate governance and transparency are cornerstones of our operations.

CMHC is a Crown Corporation, with a Board of Directors, reporting to Parliament through the Minister of Families, Children and Social Development, and Minister responsible for Canada Mortgage and Housing Corporation, the Honourable Jean-Yves Duclos.

CMHC has approximately 2,000 employees located at its National Office in Ottawa, and at five Business Centres throughout Canada: Atlantic; Quebec; Ontario; British Columbia; and Prairies & Territories.

### 1.4 National Housing Strategy (NHS) Overview

Affordable housing is a cornerstone of inclusive communities. It helps to strengthen the middle class and grow the economy. Canada’s first ever National Housing Strategy is a 10-year, \$40-billion plan that will give more Canadians a place to call home and will create a new generation of housing in Canada. Through the National Housing Strategy, the federal government is re-engaging in affordable housing and bringing together the public, private and non-profit sectors to ensure more Canadians have a place to call home. The goal of this historic strategy is to make sure Canadians across the country can access housing that meets their needs and that they can afford. To achieve this goal, the strategy will first focus on the most vulnerable Canadians.

The NHS will create livable communities where families thrive, children learn and grow, and their parents have the stability and opportunities they need to succeed. It will spearhead innovative new housing research, data and demonstration projects to fill gaps in our knowledge, share the best ideas and shape the future of housing policy in Canada. It also creates new opportunities for the federal government to innovate through partnerships with the community housing sector, co-operative movement, private sector, and research community. More information on the NHS can be found at: <https://www.placetocallhome.ca/pdfs/Canada-National-Housing-Strategy.pdf>

For more information on the National Housing Strategy, visit [placetocallhome.ca](https://www.placetocallhome.ca)

## 1.5 Initiative Overview

The NHS Demonstrations Initiative initiative is an opportunity for housing stakeholders (NGOs housing advocates, industry) and affordable housing providers to showcase and disseminate knowledge on leading-edge innovative approaches to cultivate an economically, environmentally and socially sustainable affordable housing sector. NHS Demonstrations Initiative will build upon CMHC's historical success with housing stakeholders to develop and demonstrate practical approaches to meeting current housing challenges. In alignment with the priorities and objectives set out in Canada's National Housing Strategy, the NHS Demonstrations Initiative's overall goal is to more rapidly advance sector uptake of innovative approaches to affordable housing through raised awareness and risk reduction. Showcasing platforms, whether real-world (e.g. a building) or virtual (e.g. a web based format), will communicate the best-practices, lessons learned and problem-solving strategies that will foster sustainable, energy efficient, accessible, age-friendly and socially-inclusive housing. Forward-looking NHS Demonstrations Initiative applicants will be thought leaders that offer solutions that can rapidly advance housing sector capabilities in terms of the socio-economic and environmental performance of housing, thereby enhancing the housing sector's capacity to design, build, operate and renew affordable housing. Demonstration project outcomes will better-equip housing stakeholders with practical and replicable solutions that will support a culture of innovation by reducing risks and fostering replication.

## 1.6 Application Intake Process (AIP)

CMHC is inviting eligible applicants to:

1. Develop, implement, operate and administer a demonstration project that showcases sector-leading solutions, emerging technologies, best practices, innovative policies and programs that meet or align with NHS principles and priority areas.
2. Undertake showcasing activities – website, site tours, associated industry events, publications, presentation of results at conferences, workshops, public events, demonstration team forums, etc.
3. Contribute to the achievement of federal outcomes relating to the National Housing Strategy by supporting the fostering of a culture of innovation in the affordable housing sector.
4. Monitor outputs and provide detailed reporting of the demonstration outcomes to CMHC; project (innovation) profiles, web content, tours, virtual tours, surveys, audience reaction and assessment of results.

NHS Demonstrations Initiative supports and activities will be offered to those applicants/projects that have the greatest potential to improve housing affordability and sustainability (i.e. socio, economic, environmental performance). Projects that align with one or more NHS priority objectives and/or priority populations will be deemed a higher priority (see APPENDIX 1 – NATIONAL HOUSING STRATEGY PRIORITY AREAS for more information).

CMHC uses the AIP to describe its requirements, ask affordable housing stakeholders for their demonstration applications, describe the criteria which will be used in evaluating applications and selecting successful applicants, and outline the terms and conditions under which the successful applicant will undertake the demonstration project. By submitting an application, applicants agree to be bound by the terms of this AIP, and the terms of the application that they submit.

In this AIP process, applications and applicants are evaluated in terms of ability to satisfy the stated requirements, while providing best value to CMHC with respect to its requirements.

## SECTION 2 – APPLICATION AND SUBMISSION INSTRUCTIONS

### 2.1 Overview of Section 2

The purpose of Section 2 is to inform the applicant about CMHC's procedures and rules pertaining to the AIP process.

This application guide provides information, for the benefit of applicants prior to submission of their applications, to assist the applicant in completing the application, including all the mandatory requirements (as indicated below).

Non-compliance with a mandatory requirement will result in the application being eliminated from further consideration.

### 2.2 Submission Instructions and Deadline (Mandatory)

#### 2.2.1 *Language of Application*

Applications may be submitted in English or French.

#### 2.2.2 *Applicants' Attestation (Mandatory)*

The Applicants Attestation, Section 7 in the NHS Demonstrations Initiative application form, duly executed, or an accurate reproduction signed by an authorized officer(s) of the applicant, **must be included** in the application submission.

#### 2.2.3 *Delivery Instructions and Deadline*

The NHS Demonstrations Initiative application form and the intake portal for submitting the NHS Demonstrations Initiative application form (including all supporting documentation) can be accessed at [cmhc-nhs.ca](https://cmhc-nhs.ca)

In the event that access to the platform for submitting cannot be done, in remote regions for example, it will be possible to send proposed demonstration project applications, including all supporting documentation by mail or courier. However, in such cases, the responsibility will be on the applicant to allow sufficient time from the mail drop-off or courier pick-up to ensure the application is **received** by CMHC in advance of the closing date and time, as outlined in Section 2.2.5 below.

The provision to send applications in the mail is considered exceptional and is permitted only in situations where it is not possible to use the web portal platform, such as a case involving remote regions, and therefore applicants should consult with CMHC before submitting an application by mail.

Timely and correct submissions of NHS Demonstrations Initiative applications in the exact specified delivery platform is the sole responsibility of the applicant. All risks and consequences of a failure to submit an application to CMHC are borne by the applicant. CMHC will not assume those risks or responsibilities under any circumstances.

The time of delivery for the purposes of this section is deemed to be the time recorded by the CMHC system receiving the application, and not the time the application was sent by the applicant.

Submission of supplementary information (e.g. resumes, spreadsheets, project profiles, etc.) can be submitted along with the application through the same application intake portal, or by mail, in the case of remote regions as previously indicated.

Upon receipt of applications, an automated confirmation will be issued by CMHC to the sender's e-mail address. It is strongly recommended that applicants follow up with the inquiries person named in Section 2.2.5, see below, should they not receive a confirmation within 30 minutes of submission.

Only applications submitted via the NHS Demonstrations Initiative application form portal (or on an exceptional basis as previously indicated, by mail where it is not possible to use the portal) will be considered for further evaluation.

#### **2.2.4 Application Opening, Verification Period, and Deadlines**

All NHS Demonstrations Initiative applications received on or before the closing date and time specified below, will be opened and reviewed for verification by CMHC. If, at the time of the initiative's closing, CMHC is unable to open an application, the applicant will be so advised and provided an opportunity to resubmit a version that can be opened within 24 hours of notification.

Your application must be submitted and received at the intake portal location specified in Section 2.2.3 on or before the submission deadline set as:

**2:00 p.m. local Ottawa time, on June 29, 2018**

Applications arriving late will be automatically rejected, and the sender will be so notified by e-mail.

#### **2.2.5 Inquiries**

All questions regarding this demonstration AIP must be sent by e-mail or facsimile to the contact person through the following channel:

CMHC Demonstrations Officer  
**[Innovation-Research@cmhc-schl.gc.ca](mailto:Innovation-Research@cmhc-schl.gc.ca)**  
1-800-668-2642

Changes to the AIP and Applicants' Guide document will only be effective if issued by CMHC in writing as described below. Applicants are therefore strongly cautioned to request that all clarification, direction and changes be provided in writing, as information given orally by any person within CMHC shall not be binding upon CMHC.

All written questions submitted, which in the opinion of CMHC raise an issue that has the potential to affect all applicants, will be answered by CMHC in writing and distributed to all applicants by e-mail. The identity of the applicant making the inquiry will not be included in the response. Any questions of a proprietary nature must be clearly marked as such.

In the event that it becomes necessary to revise any part of the AIP as a result of any inquiry or for any other reason, an addendum to this AIP will be provided to applicants by facsimile or e-mail.

CMHC has no obligation to respond to any inquiry, and will determine, at its sole discretion, whether it will respond to inquiries that are submitted. CMHC cannot guarantee a reply to inquiries received less than **seven (7) calendar days** prior to the closing date.

### **2.2.6 Communication**

During application evaluations, CMHC reserves the right to contact or meet with any individual applicant in order to obtain clarification of its submission, including clarification of the scope of services offered. Any such communication is limited to clarification purposes only, and applicants will not be allowed to revise their application during this process.

### **2.2.7 Applicant Contact**

The applicant identified in section 1.1 of the NHS Demonstrations Initiative application form, including name and contact information shall be the primary contact for CMHC during the evaluation period. During application evaluations, CMHC reserves the right to contact or meet with any individual applicant in order to obtain clarification of its submission, including clarification of the scope of services offered. Any such communication is limited to clarification purposes only, and applicants will not be allowed to revise their application during this process.

### **2.2.8 Offering Period (Mandatory)**

It is a deemed condition of every application that the terms of the application shall remain valid and binding on the applicant until such time as an Agreement is negotiated and executed, not to exceed **ninety (90) days** following the AIP closing date.

### **2.2.9 Changes to Application**

It is strongly suggested that the applicant take time to review their application prior to submission to minimize the need to make changes.

Applicants are permitted to include additions, deletions, make edits and changes to the application form at any time before the posted 'Submission Deadline' as noted above.

Please note that changes or additions to applications after the application submission deadline are not permitted and therefore will not be accepted in the intake portal.

Changes to an application submission are permitted, provided that they are received as an addendum to, or clarification of, a previously submitted application, or as a new application that replaces and supersedes the application that was previously submitted.

To add information or make changes to a previously submitted application, applicants must make arrangements with a CMHC representative through the inquiry channel indicated in Section 2.2.5. Where the new application is intended to replace all or part of an earlier application submission, it must be accompanied by a clear statement specifying the sections of the earlier application that are replaced by the new application. Changes or additions to a previously submitted application must be fully completed and received no later than the submission deadline.



### **2.2.10 No Liability**

While CMHC has made considerable efforts to ensure that the information in this AIP is accurate and complete, it is possible that errors may exist. The information is not guaranteed or warranted to be accurate by CMHC, nor is it necessarily comprehensive or exhaustive. CMHC will have no liability of any kind to applicants for losses or damages arising from any errors that may be found in the AIP, regardless of how the errors are caused. Applicants remain obliged to make their own investigation of relevant information and to form their own opinions and conclusions in respect of the matters addressed in this AIP.

By submitting an application, applicants waive any claim or cause of action that they may have against CMHC or its representatives as a result of the conduct of this AIP process or any resulting contract award, except insofar as they have proof of willful misconduct on the part of CMHC or its representatives. Applicants agree that they will not bring a court action or institute any other proceedings against CMHC for damages arising from the conduct of this AIP or any resulting award of Contribution Agreement. This section is intended to be a complete waiver of the applicant's right to claim damages subject to the limited exception noted above.

### **2.2.11 Verification of Applications**

The applicant authorizes CMHC to conduct such investigation as it deems appropriate to verify the contents of the application.

Some NHS initiatives that involve loans require CMHC to determine the primary applicant's creditworthiness by undertaking a credit inquiry at the application stage. With respect to the NHS Demonstrations Initiative, a credit inquiry will not be required at the application stage, however, CMHC reserves the right to undertake a credit inquiry of the primary applicant (and partners) if the application is successful and recommended to proceed to the Contribution Agreement stage of the process.

### **2.2.12 Ownership of Responses**

All applications and submitted related materials become the property of CMHC upon submission and will not be returned to applicants. Applicants are not entitled to any compensation for any work related to, or materials supplied in the preparation of their applications.

The applicant owns and holds all rights, title and interests in, or has a valid right to use, all intellectual property in and to all information and materials produced in connection with the applicant's project and the application (including, without limitation, all patents, industrial designs, trademarks, trade names, service marks, copyrights, trade secrets, inventions, know-how, domestic or foreign, and any registrations and applications for registration for any of the foregoing) to the extent it is neither published nor otherwise in the public domain. Subject to the terms and conditions of this application, the applicant hereby grants to CMHC a non-exclusive, perpetual, irrevocable, assignable, royalty-free sub-licensable license to use, make, have made, sell, offer for sale, and import the intellectual property worldwide, with the right to make such modifications as may be desirable for any purpose related to the current or future operation of CMHC.

All information regarding the terms and conditions, financial and/or technical aspects of the application which are of a proprietary or confidential nature, must be clearly marked "PROPRIETARY" or "CONFIDENTIAL". Proprietary and confidential markings shall be included beside each item or at the top of each page containing information that the applicant wishes to protect from disclosure.

CMHC will take steps to protect applicants' documents and information so marked from disclosure. Notwithstanding the foregoing, CMHC shall have no liability of any kind to applicants based on the inadvertent or unintentional disclosure of proprietary information.

Applicants are further advised that as a Crown corporation, CMHC is subject to the federal legislation with respect to access to information and privacy. In certain specific circumstances, information submitted to CMHC by third- parties may be required to be disclosed pursuant to federal legislation. In such cases, to the extent reasonably possible, CMHC will make efforts to advise the applicant of the required disclosure prior to releasing the information.

### ***2.2.13 Proprietary Information***

Information about CMHC that is contained in this AIP document is to be considered proprietary information of CMHC. It is made available for the sole purpose of providing applicants with sufficient information to prepare responses to the AIP. Applicants and other readers of this document may not make any other use of information contained in the AIP.

### ***2.2.14 Corporation Identification***

Applicants agree that they will not make any use whatsoever of CMHC's name, logo or other official marks without the express written consent of CMHC.

### ***2.2.15 Declaration With Respect to Gratuities***

By submitting an application, the applicant certifies that no representative of the applicant, or any individual or entity associated with the applicant has offered or given a gratuity (e.g. an entertainment or gift) or other benefit to any CMHC employee, Board member or Governor-in-Council appointee with the intention of obtaining favourable treatment from CMHC.

### ***2.2.16 Conflict of Interest***

The applicant and its principals, employees and agents shall avoid any real, potential or apparent conflict of interest during the AIP process, and upon becoming aware of a real, potential or apparent conflict, shall immediately declare the conflict to CMHC. The applicant shall then, upon direction of CMHC, take steps to eliminate the conflict, potential conflict or perception that a conflict of interest exists.

The successful applicant must not provide any services to any third-party in circumstances that might reasonably give rise to a conflict of interest between the applicant's duties to that third-party and the applicant's duties to CMHC.

In the event that a conflict of interest, real, potential or perceived, cannot be resolved to the satisfaction of CMHC, CMHC shall have the right to immediately eliminate the applicant from consideration under the EOI or to terminate the resulting agreement. Upon such elimination or termination, CMHC shall have no obligation of any nature or kind to the applicant.

### **2.2.17 CMHC's Obligations**

By issuing this NHS Demonstrations Initiative AIP and accepting applications, CMHC assumes the obligation of conducting the process in a fair and transparent manner. CMHC has no obligation to accept any application or services, or to compensate any applicant for work done other than as may be set out in a written Contribution Agreement with that applicant.

### **2.2.18 Contribution Agreement**

Selected applicants shall receive contribution funding by CMHC. The applicant and CMHC shall enter into a contribution agreement that will set out the terms and conditions of such funding.

### **2.2.19 Indemnification and Insurance Requirements**

In submitting a demonstration initiative application, the applicant understands and acknowledges that should the project be accepted, the applicant shall, at its own expense, procure and maintain or cause to be procured and maintained insurance coverage which is commercially reasonable and customary for businesses of similar industry practices which shall be in force for the duration of the project. CMHC reserves the right, in its sole and absolute discretion, to conduct Insurance Requirement negotiations with the applicant. Depending on the level of risk exposure of the project, various insurance coverage and insurance limits may be required and/or adjusted accordingly.

The applicant also acknowledges and accepts that should the project be accepted, any subsequent contribution agreement with CMHC will include clauses stipulating the applicant will indemnify and save harmless CMHC and its directors, officers, employees and agents.

## **SECTION 3 – APPLICANTS' GUIDE**

### **Where to Apply**

The NHS Demonstrations Initiative involves an on-line application intake process. See Section 2.2.3 of this guide, Delivery Instructions and Deadline, for information on obtaining an application form and the intake portal for submitting the NHS Demonstrations Initiative application.

The application form must be submitted in accordance with the conditions and requirements as set out below and as stated in the delivery instructions in Section 2.2.3 in order to be considered for evaluation by CMHC.

### **Application Form – Section 1: General Information**

General information regarding the proposed demonstration, including the identification and contact information of the applicant, as well as the key personnel representing project partners and other contributors to the proposed demonstration is required in Section 1.

In preparing and submitting an application for a proposed demonstration, the applicant must consider the following eligibility requirements under the NHS Demonstrations Initiative:

### ***Application Form – Section 1.1: Eligible Applicants***

Participation in the NHS Demonstrations Initiative is, for all intents and purposes, open to anyone that is part of a broad range of affordable housing stakeholders (as applicants, partners or sponsors) including:

- Canadian companies, organizations, associations, Canadian citizens
- Private and non-profit builders and developers
- Non-profit affordable housing organizations and affordable housing cooperatives
- Provincial, territorial or municipal housing agencies and corporations
- First Nation housing organizations, agencies and authorities
- Non-governmental organization (NGOs) seeking to demonstrate and showcase new and innovative approaches to the efficient and effective provision or delivery of affordable housing projects (e.g. Habitat for Humanity, Tower Renewal Partnership, CaGBC, FCM etc.)
- Governmental and non-governmental organization (NGOs) seeking to demonstrate and showcase new and innovative approaches for the effective and efficient provision and/or delivery of programs and services supporting and improving the quality of life of vulnerable populations living in affordable housing.
- International organizations and individuals may be members of the demonstration team but not the primary lead applicant (i.e. they must partner with a Canadian applicant that acts as the 'host').

Eligible applicants must indicate any relevant project funding that they have applied to, been approved for, or have received. Also indicate partner or co-applicant funding and include funding from other NHS initiatives (for example, Innovation Fund (ARHIF), Co-investment, Lands, Technical Resource Centre (TRC) and Rental Construction Fund (RCF)).

### ***Application Form – Section 1.1: Demonstration Initiative Eligible Timeframe***

The applicant must clearly identify the demonstration project “Start Date” and “End Date”. The duration of demonstration project is up to 18 months from the signing of the contribution agreement, although consideration will be given to longer periods if warranted.

### ***Application Form – Section 1.2: Eligible Partnerships And Collaborators***

There are no restrictions in the NHS Demonstrations Initiative with respect to joint ventures, partnerships and collaborations with third-parties; in fact, partnership arrangements and leveraging opportunities are encouraged. However, the application must clearly articulate the key roles and contributions each individual participant brings to the project and how the team ensemble brings (added-) value to the demonstration project.

Although not a prerequisite, the evaluation of the application will afford a higher preference to those demonstration projects whereby an affiliation and arrangement with a Canadian affordable housing provider (and project) partner has been established; the affordable housing provider is expected to host and actively participate in demonstration project.

Consider the following items in completing this section of the application:

- How well do the proposed project’s partners and collaborators align with the demonstration objectives (i.e. are they a good fit)?
- To what degree will the collaboration activities enhance outcomes, bring value to the project, and increase the probability of success, without undue risk, by partnering?
- Do the partnerships strengthen leveraged outcomes through collaboration?

### ***Application Form – Section 1.3: Funding Requests From Other Organizations***

Demonstration projects applying for funding or receiving funding from other institutions, organizations, programs, etc., are eligible to apply for NHS Demonstrations Initiative funding; stacking and leveraging of funds to undertake demonstration projects is permitted.

However, this section of the Application Form is intended to highlight whether the proposed demonstration project is subject to and contingent upon any (pre-) existing funding arrangements or funding requests that may impact the feasibility or viability of the proposed demonstration project proceeding, whether or not the granting of funds from the NHS Demonstrations Initiative is successful. If so, the applicant must provide key information regarding the external affiliations including contact information and details surrounding the other funding application(s), including funding amounts, status of application, type of funding, etc.. As part of its due diligence process, CMHC may contact these other potential funders; unless instructed otherwise by the applicant (with reasons provided).

During the application evaluation, consideration may be given with respect to the dependency on external (or third-) party funding arrangements or approvals to realize the undertaking and completion of the proposed demonstration project.

### **Application Form – Section 2: Project Details**

In this section, the applicant is to provide detailed information regarding the nature and extent of the proposed demonstration project and the roles and contributions of the key players in the design, delivery and implementation of the project.

#### ***Eligible Demonstration Projects***

Under the NHS Demonstrations Initiative, CMHC will support and leverage the demonstrations that are aligned with federal NHS priorities including housing for populations in greatest need (see Section 4). In all cases, demonstrations that respond to a broad range of NHS objectives such as affordability, environmental sustainability, accessibility, social inclusion and financial viability will be eligible. Prioritization of the application will take into account levels of affordability, energy efficiency or accessibility, with strength attributed to those projects that meet or exceed the minimum NHS priorities in one or more areas.

NHS-funded projects (approved under the NHS initiatives; Innovation Fund, Co-investment, Lands, Technical Resource Centre (TRC) and Rental Construction Fund (RCF)) that meet or exceed the minimum requirements for energy efficiency, accessibility and affordability are eligible for NHS Demonstrations Initiative funding to show-case innovative technologies, practices, programs, policies related to the planning, financing, design, construction, operation, renewal, demonstration of affordable housing projects and services that support better outcomes for the populations served.

Applications for NHS Demonstrations Initiative funding must clearly articulate the nature and extent to which the project demonstrates features, approaches, programs, policies, practices or technologies that are best-in-class, innovative leading-edge, replicable and scalable, for effective, efficient and sustainable administration, management and delivery of affordable housing (and affiliated supportive services) for all Canadians including vulnerable populations.

With respect to technologies, the descriptors “new, best-in-class, innovative, leading-edge” shall refer to products and systems that are near- or market-ready or have clearly demonstrated applications in non-housing related fields but may not be currently adopted in the housing sector. Prototypes, “proof-of-concept”, early-development projects or experimental technologies will not be considered under this initiative.

To be eligible for funding under the NHS Demonstrations Initiative demonstration projects must also be compliant with the following requirements:

- Projects must be located in Canada.
- Involve or apply to affordable housing – including rental or affordable homeownership
- May address any housing form (singles, detached, row, multi-unit), ownership (non-profit, public, private rental, ownership) and tenancy (owned, rented)
- May include shelters, seniors' facilities, housing projects for physically, cognitively and developmentally challenged persons and housing for other vulnerable persons at risk.

### ***Eligible Demonstration Activities***

This section provides examples of eligible demonstration activities that may be funded; that is, activities that showcase new and innovative technologies, practices, programs, policies and strategies, services (supporting and improving the quality of life of vulnerable populations and those persons with distinct needs living in affordable housing). Eligible activities are primarily associated with developing, operating and maintaining the showcasing platforms (e.g. websites, staffing building tours, webinars, workshops, etc.), and the dissemination of information using knowledge products such as videos, case studies, presentations, best-practice guides, etc.

Please consider the following when determining which eligible activities are in and out of scope for the project. Eligible activities include:

- Designing, developing and delivering of knowledge transfer products such as; brochures, case-studies, posters, videos, 3-D photos, 3-D virtual models, educational seminars, presentations, mock-ups and models, on-line forums, information sharing platforms, etc.; through a variety of mediums such as social media, industry, partners, academia, etc.
- Data collection and documentation activities for CMHC to provide information about public and stakeholder impacts including participant surveys, user experiences, housing provider feedback, etc.. Eligible activities also include monitoring and reporting activities which are important for acquiring insights into the outcomes and the measure of, and attribution of success – information that will feed into the final CMHC report.
- Development and coordination of dashboards, displays and equipment to showcase performance characteristics and enhance the demonstration activity; for example, demonstrating and showcasing the 'real-time', in-situ performance of energy efficient features, technologies or buildings.
- Design and development of the demonstration project including design services, professional consultations, technical advice, implementation strategies, printing production, documentation activities (e.g. video, photos), presentation materials, site preparation and clean-up (specific to the demonstration project), project management, consultations, and any other activity that can be convincingly demonstrated to be integral to the delivery of the project.

The above list of eligible activities is not exhaustive nor comprehensive; the applicant may propose other activities for eligibility. However, in doing so, the applicant must clearly demonstrate in the application, that the proposed activity is associated only with the demonstration project and supports and enhances its' design, development, delivery and implementation. Applicants are reminded that selecting applicants for the initiative is a competitive process and CMHC will be assessing the relative value-for-money offered in each applicant's application.

### ***Ineligible Demonstration Activities***

The following provides examples of activities that are not eligible for funding under the NHS Demonstrations Initiative:

- Tasks or work related to demonstration projects and activities initiated and/or completed prior to the submission and acceptance of the application by CMHC.
- Affordable housing project development including:
  - Asset investments (for example, buildings, land, construction materials, etc.) – other than those directly related to the demonstrated technology, practice, program, policy, strategy
  - “hard” project development activities, such as site preparation, lot servicing, project design, construction or renovation, which are outside the demonstration project scope (e.g. capital costs related to construction activities and purchase and installation of technologies) – other than those directly related to the demonstrated technology, practice, program, policy, etc.
- Research and development activities related to the new and emerging technologies (for example, the next generation Heat Recovery Ventilator) and their implementation in buildings and housing or improvements to building practices
- The development, testing, evaluation of policies, programs and strategies – the subjects of the demonstrations must be ready to be included in affordable housing projects.
- Product marketing and commercialization costs.
- Costs associated with patent submissions.
- Costs associated with certification processes or compliance with various ‘labeling’ systems.

Any other costs not directly associated with showcasing, communicating information and reporting on the demonstration project as outlined in Eligible Activities (above) will likely be ineligible.

### ***Application Form – Section 2.1: Demonstration Project Objective***

The applicant must provide a brief and succinct statement explaining what the demonstration project is, the objectives (purpose) of the demonstration project and the expected impact and outcomes.

Consider the following:

- Is the explanation of the project objectives sufficiently detailed?
- Do the objectives align with the project’s expected outcomes?
- Are the project’s objectives well-aligned with the NHS Demonstrations Initiative’s objectives and desired outcomes?

### ***Application Form – Section 2.2: Demonstration Project Description***

Check-boxes are provided for the applicant to indicate what type of demonstration project will be showcased. If none of the listed demonstration types is applicable to the proposed demonstration project, the applicant has the opportunity to indicate the appropriate type as “Other”.

This section is, effectively, the presentation of the “Statement of Work” which provides a detailed breakdown of all the relevant and key activities, tasks, milestones involved in the design, delivery and implementation of the demonstration project including the knowledge dissemination and reporting activities. In preparing the detailed breakdown, consideration should be given to the packaging of activities/tasks/milestones/etc., so that it is presented in a manner that it can be easily transferred to the summary tables provided in Section 2.4, as well as in Section 3.1 Project Costs.

The following bullets are examples of questions to be considered in the preparation of the project details:

- What will the demonstration project showcase?
- How will the demonstration be carried out, and by whom?
- What are the different phases, milestones, tasks, activities, and any stage gates or dependencies including proposed start-end timelines?
- identify the purchase of outsourced products/services/activities, etc.,
- What technologies, policies, programs, etc. (if any) will be created?
- What knowledge transfer activities will be undertaken? When? Using what communication mediums?
- What performance monitoring activities will be undertaken and how will outcomes be reported to CMHC?
- How will the immediate impact and longer-term success of the demonstration be assessed?
- What is the accountability framework and the communication strategy to ensure progress feedback?

### **Demonstration Reporting**

The applicant will be responsible for the production, and submission to CMHC, of a final demonstration project report (supplemented with visual aids including photographs, digital images, graphs, charts, figures and other illustrations) which summarizes and documents the overall demonstration project from project design and implementation to completion including:

- key activities and tasks completed
- products created and developed
- surveys performed and the results from the evaluation/assessment of responses
- demonstration project outcomes

Depending on the nature of the demonstration initiative, consideration should be given to the collection (and reporting) of data (information) related to the affordable housing sectors' interest in and potential adoption of the demonstration subject-matter. The following are examples of the types of information (data) which may be captured:

- number of visitors (including market segmentation) attending site-tours and other public viewings; exit surveys may assist in capturing relevant information.
- number of hits and landings on website;
- number and type of products downloaded from site.

In order to facilitate and schedule progress payments, the applicant may consider the development and submission of more frequent progress reports or reports tied to completion of Key Activities or at key milestones.



### **Key Considerations**

- Is the description sufficiently detailed with key start-end dates?
- Is the project description well-constructed, clearly describing the design, delivery and implementation of demonstration together with the knowledge transfer elements?
- Are the dependencies, partnerships and relationships appropriate with respect to the delivery and implementation of the demonstration project?
- Is the project description coherently written, well-organized and comprehensive (i.e. no information gaps)?

### ***Application Form – Section 2.3: Team Members***

The purpose of this section is for the applicant to provide comprehensive details of the skills and competencies of the project team members that will design and implement the demonstration activities described above.

List all the key members of the project team, providing descriptions of each individuals' expertise and experience with respect to their respective roles and functions on the team. Also, list the tasks and responsibilities assigned to each of the team members and describe how their involvement will lead to a successful completion of the project. Providing references to previously completed projects of a similar nature in which the team members participated in a similar capacity would be useful in demonstrating the team's capabilities.

If any key activities are to be outsourced to external resources (e.g. hiring the services for videography, writing, site tours, presentation materials, technical tasks, etc.) or project partners (e.g. a NGO, housing provider, or government agency) that will be undertaking particular demonstration activities please include a competency and experience profile for these resources as well.

In the area under this heading, the applicant has the opportunity to highlight previous examples of when and how the 'team' has worked and collaborated together on other projects of similar scope and size to successfully complete the project and achieve the desired outcomes.

### **Key Considerations**

- Does the project team have people in place with the experience and expertise to undertake the functions and/or activities assigned to them? For example:
  - Project management skills to develop, implement and monitor the demonstration project
  - Writing and communication skills to create/develop knowledge transfer products
  - Marketing skills to prepare, undertake and analyse showcasing activities
  - Event coordination skills to manage stakeholder and public activities
  - Sufficient time to undertake and complete all activities (i.e. resources are not over-extended).

***Application Form – Section 2.4: Project Activity Summary***

In this section of the application form, provide a summary of the “Main Activities” and their associated “Sub-Activities” to create a high-level design and implementation schedule based on the Project Description in Section 2.2. Full descriptions of each activity is not required if detailed in projection description above. Ensure the activities indicated are in alignment with each phase or segment of the project (i.e. design, implementation, showcasing, knowledge products, information dissemination, wrap-up activities, reporting). Enter “Start Date” and “Completion Date” for each of the main activities. Also, indicate the outputs associated with each activity (e.g. knowledge product, showcasing activity, public tour, webinar, presentation, video, policy or program design, etc.).

***Application Form – Section 2.5: Knowledge Dissemination Plan***

This section, Knowledge Dissemination Plan (Plan), of the application form allows the applicant to describe, in detail, their communication plan and information dissemination strategy surrounding the demonstration project and the key outcomes the demonstration project is aiming to address within the broader affordable housing sector. The Plan should describe how knowledge gained and lessons-learned from the demonstration will be communicated to targeted audiences, include activities during the demonstration period as well as at any period of time after the actual demonstration has been completed and describe how the information and knowledge generated over the course of the demonstration will be transferred to raise awareness, knowledge and uptake of the innovation(s) demonstrated.

The Plan can be broken down into three (3) key areas; knowledge products, dissemination channels, and target audiences.

1. The following are examples, of knowledge products that may be produced/developed/created as part of the NHS Demonstrations Initiative:
  - reports, case studies, building profiles, technology profiles, presentations, policy or program application
  - posters, displays, dashboards, best-practice guides, interactive web site, infographics
  - photography (for example, 3D virtual tours), web applications, time-lapse video
  - “face-to-face” videos (including interviews with subject-matter experts, persons with lived-experience)
2. A variety of delivery mediums and channels may be suitable to relay the information packages to the broader affordable housing sector, including:
  - Internet – including web-sites, podcasts, webinars, social-media, Youtube
  - On-site public tours, open-houses, expert communities, industry events, newspaper/journals
  - Information seminars, stakeholder conferences, workshops, public engagements, housing forums
3. A variety of key audiences can be targeted to focus knowledge dissemination activities, including:
  - housing providers, technical experts, housing NGOs, builders, various levels of government, socio-economic policy and program developers, healthcare institutions, advocacy groups for vulnerable people

The Plan must clearly articulate the (added-) value of the proposed product, the efficacy of the delivery medium, and the appropriateness of the key audiences. The Plan must also address how the demonstration project outputs will inform and enhance the uptake of the innovative solution, best-practice or cutting-edge strategy within the housing sector in the long-term.

The Table, in Section 2.5 of the Application Form, contains information derived from the Knowledge Dissemination Plan, which summarizes:

- Each of the key knowledge products together with both the intended dissemination channels and key-target audiences and the expected product release date(s).
- Each Knowledge Transfer Activity together with the location and duration of each activity.

### **Key Considerations**

- Does the knowledge dissemination plan provide a thorough and well-constructed overview of the knowledge transfer products and activities, channels and targeted audiences
- Are those products, activities and channels effective in
  - **raising awareness** in the sector and
  - **transferring knowledge** that,
  - **fosters uptake of the innovation(s)** demonstrated?
- What is the knowledge transfer plan stakeholder engagement strategy?
- Does the Plan sufficiently address interdependencies and potential barriers or limitations that would adversely impact the communication and outreach strategy?

## **Application Form – Section 3: Project Funding**

This section of the application form highlights the financial considerations of the demonstration project.

### ***Application Form – Section 3.1: Project Costs***

Section 3.1, provides a summary of the “Project Costs” associated with each of the demonstration activities/tasks/milestones/etc., that were previously described in detail in Section 2.2 Project Description, and summarized in Section 2.4 Project Activity Summary together with a detailed breakdown and description of all costs that are included in the Total. An example of a demonstration cost breakdown table is provided in Appendix 2 of this guide. For each Activity, the total cost is required as well as the costs being requested from CMHC with respect to that activity. This allows CMHC to evaluate and assess the compliance of the activity for purposes of eligibility and the reasonableness of the associated costs.

### ***Application Form – Section 3.2: Proposed Funding Contributions***

Section 3.2 is a summary of the funding resources and contributions, from all sources (including Partners, Collaborators, CMHC, others) that are required to pay for the design, delivery and implementation of the proposed demonstration project in accordance with the proposed Project Description (Section 2.2), Project Activity Summary (Section 2.4) and Knowledge Dissemination Plan (Section 2.3).

The applicant must ensure that Total Project costs (in Section 3.1) are the same as the Total Project Contributions (in Section 3.2).

The applicant will identify, in the table provided, the funding contribution provided from all resources (including the applicant and Partners). Funding contributions earmarked for specific activities should also be clearly identified in the tables. The demonstration project funding contributions may be provided in the form of “cash” or “In-Kind” amounts, defined as follows:

- **Cash Contribution** refers to the provision of actual dollars (currency) used to off-set and pay for project expenses incurred during the design, delivery and implementation of the project. The request for CMHC’s contribution to the demonstration project will be in the form of a cash contribution that may be used to cover expenses associated only with eligible activities.
- **In-Kind Contribution** refers to the dollar-value (as determined by CMHC) of labour, services and resources team members contribute towards the design, delivery, information dissemination, and reporting aspects of the demonstration project, or specific activities within the overall project, in lieu of cash or in lieu of services necessary to the design, delivery and implementation of the demonstration project that would have otherwise been purchased. A breakdown of all In-kind contributions (staff time, labour rates, expenses, etc.) together with the associated activity, will be required for the review and consideration by the evaluation committee.

The evaluation of demonstration applications will be prioritized with respect to the “Funding request from CMHC” as a ratio of the total Cash contribution provided by the applicant and project partners.

## Application Form – Section 4: Project Relevance

### ***Application Form Section 4.1: NHS Priority Area***

In this section please check off all appropriate boxes indicating which applicable NHS Priority areas the demonstration project is aligned with.

### ***Application Form Section 4.2: NHS Priority Population***

In this section please indicate which applicable NHS Priority population(s) the demonstration project is aligned with (see APPENDIX 1 for more information).

### ***Application Form Section 4.3: Project Alignment with NHS Priority Areas and Desired Outcomes***

Please provide details on the project’s alignment to the NHS priorities and expected outcomes, including the project’s relevance to priority populations (i.e. the housing needs of vulnerable peoples indicated in Section 4.2 of the NHS Demonstrations Initiative application). The supporting information should substantiate project relevance to the NHS vision, themes and outcomes. The information should also demonstrate how the project will contribute to the development of sustainable housing and other social, economic and environmental goals. Indicate how the problem-solving innovation could support a better quality of life by improving housing conditions for Canadians and how the solutions will substantively impact the outcomes for NHS priority populations.

Consideration should be given to the NHS core policy areas, gaps in the housing system that are addressed, and how the project will improve housing outcomes for Canadians, particularly those in greatest need. Demonstrate alignment with broad NHS themes and indicate how the project will address: the distinct needs of low-income and vulnerable Canadians; the vitality of the social housing sector; housing for Indigenous people, including the North (if applicable); and any innovative strategies that increase affordability.

High value will be attributed to applications that can demonstrate strong connections between the project’s potential impacts and NHS priorities. The information provided should explain how the project outputs are linked to NHS objectives, specifically those that lead to sustainable housing and communities, including:

- **Homelessness** is reduced year-over-year
- Housing **promotes social and economic inclusion** for individuals and families.
- Housing outcomes in **Canada’s territories and for Indigenous peoples** are improved year-over-year.
- Housing **contributes to environmental sustainability** and is a source of stability for the Canadian economy.
- **Partnerships are built, strengthened and mobilized** to achieve better outcomes.
- **Horizontal collaboration/alignment** across the federal government result in more holistic responses.
- Greater support of Government of Canada **Gender and LGBTQ2+focused initiatives**. **Housing affordability and condition** is improved.

Demonstrations that holistically address multiple NHS priorities with the prospect of deep and enduring impacts will offer the most value for housing stakeholders. Provide details of how the showcasing elements and knowledge dissemination activities will enhance NHS desired housing outcomes, including increased accessibility, affordability, energy efficiency and social inclusivity. For projects that offer breakthrough innovation potential for a single NHS priority, provide details on the significant order-of-magnitude level improvement.

It is recommended that the applicant review the NHS website and relevant background documents in order to demonstrate that the project aligns with the NHS priorities and expected outcomes.

## Application Form – Section 5: Affordable Housing Sector Impacts

Consider this section – Affordable Housing Sector Impacts – the most important!

Does the design, delivery and implementation of the proposed demonstration project, including the knowledge transfer plan, have the potential to significantly impact the adoption of the demonstration feature (technology, program, policy, etc.) within the affordable housing sector?

### Considerations

- Demonstration – incremental improvements over existing or breakthrough ‘game-changer’?
- Supports a culture of innovation by creating a more knowledgeable and capable housing sector?
- Demonstration – applications are local in nature or national in scope?
- Magnitude of impact (i.e. is it a solution for a specific stakeholder vs. all housing providers)?
- Depth of impact (i.e. spurs the sector to adopt long-term solutions to a chronic, long-standing problem vs. a short-term solution)?

Provide an overview of the short-, mid- and long-term impacts that will improve housing conditions and meet the needs of Canadians, particularly the housing needs of vulnerable people. Additionally, provide evidence of adequate and abiding sector capacity and interest to use the results of the demonstration project. Include a rationale that justifies the funding request in terms of the benefits, and describe the impacts of the knowledge outputs as they are replicated and implemented on a broader level.

Please describe the potential impact of the demonstration in terms of how the forward-looking solutions, real-world data, lessons learned and applied knowledge will benefit affordable-social housing stakeholders. Provide details on the impact process flow, from showcasing activities to knowledge dissemination, that will support a culture of innovation by creating a more knowledgeable and capable housing sector. Demonstrate the sound value of the project to the affordable housing sector in terms of: i) the range of impact (i.e. local or national scope); ii) magnitude of impact (i.e. is it a solution for a specific stakeholder vs. all housing providers); iii) the depth of impact (i.e. spurs the sector to adopt long-term solutions to a chronic, long-standing problem vs. a limited short-term solution); iv) showcasing impacts (e.g. target audience, duration, level of public exposure, etc.); v) knowledge dissemination impacts (e.g. knowledge gaps, implementation barriers, sector uptake expectations, etc.).

Applications will be strengthened by providing a well-articulated impact assessment with supporting evidence that substantiates claims.

## Application Form – Section 6: Project Risks

All projects, activities and tasks carry inherent risks that impact their ability to be successfully completed. In this section, the applicant is asked to detail the risks at various stages of the proposed demonstration project, from design and development to deployment and implementation, and to propose corresponding strategies to mitigate and/manage those risks to a reasonable degree.

The applicant should consider a risk assessment that identifies the operational, reputational, and business risks to project delivery such as the following examples:

- complexity of the project;
- the number and magnitude of project unknowns and uncertainties;
- internal-external dependencies (i.e. reliance on certain events outside the control of the project team) happening that may impact the project delivery and implementation;
- lack of expertise (amongst the project team members) in certain areas of the application impacting project delivery or attaining desired outcomes;
- outsourcing elements of the demo project to third (external) parties;
- financial strength of the application; includes both accuracy and reliability of the project cost assessment as well as the capacity and ability of the project partners to deliver on the required funding amounts;
- potential damage to property or injury to partners, stakeholders and the public;
- disruption to property or operations due to the installation or deployment of the demonstration innovation;
- unintended consequences from showcasing the demonstration;
- reputational risk (to the applicant, the partners or CMHC) resulting from the demonstration failing to achieve its desired objectives and intended outcomes.

For each risk that is identified, state the mitigation strategies that the project team will employ. The following are examples of activities that may require additions/modifications/deletions that may be implemented to mitigate the assessed risk:

- project management resources and methodology;
- communication strategy;
- monitoring of outputs and impacts;
- internal oversight mechanisms; and timely communication and reporting.

# APPENDIX 1 – NATIONAL HOUSING STRATEGY PRIORITY AREAS

In order to align the NHS Demonstrations Initiative project proposals within the NHS, CMHC is seeking applications for demonstrations to showcase and disseminate knowledge on leading-edge innovative approaches to cultivate an economically, environmentally and socially sustainable affordable housing sector that fit within one or more of the following Priority Areas:

Priority Areas
<p><b>Housing for those in Greatest Need</b></p> <ul style="list-style-type: none"> <li>• Improve housing and supports for the most vulnerable, including those who are homeless and those with distinct needs</li> <li>• Improve affordability of housing for low-income households</li> </ul>
<p><b>Community Housing Sustainability</b></p> <ul style="list-style-type: none"> <li>• Improve sustainability of community housing and build capacity</li> </ul>
<p><b>Indigenous Housing</b></p> <ul style="list-style-type: none"> <li>• Improve housing conditions among First Nations, Métis and Inuit households</li> <li>• Increase Indigenous autonomy and capacity for housing</li> </ul>
<p><b>Northern Housing</b></p> <ul style="list-style-type: none"> <li>• Improve housing conditions in Canada’s territories</li> </ul>
<p><b>Sustainable Housing and Communities</b></p> <ul style="list-style-type: none"> <li>• Improve building performance, durability and energy efficiency of housing</li> <li>• Increase housing options near transportation and transit, work, supports and services, as part of mixed income, age-friendly, accessible communities</li> </ul>
<p><b>Balanced Supply of Housing</b></p> <ul style="list-style-type: none"> <li>• Increase Canada’s supply of rental housing</li> <li>• Preserve and renew existing rental housing</li> <li>• Meet evolving home ownership needs of Canadians</li> </ul>

Please go to [cmhc-nhs.ca](http://cmhc-nhs.ca) for more detailed information regarding the NHS Priority Areas and the NHS Priority Population Groups.





