



# Innovation and Research *Solutions Labs*

## APPLICANT GUIDE



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**Use of Information & Disclaimer:** The information about CMHC that is contained in this 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 application for Solutions Labs. Applicants and other readers of this document may not make any other use of the information contained in the document.

## PART 1 – GENERAL INFORMATION

### Overview

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

### Initiative Introduction

CMHC wishes to enter into **agreements** with multidisciplinary, holistic and committed project teams (hereafter referred to as the “applicants”) for the purpose of supporting Solutions Lab activities that will develop innovative solutions to identified housing problems within the **National Housing Strategy (NHS)** priority theme areas and priority populations.

This application guide provides an overview of the application intake process, guidance on the information to be included in the application, the criteria which will be used in evaluating the application and selecting successful applicants, and outlines the terms and conditions under which the successful applicant will be awarded the agreement. By submitting an application, applicants agree to be bound by the terms of this application process, and the terms of the application that they submit.

### 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 responsible for Canada Mortgage and Housing Corporation.

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 and Territories.

## 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/>.

## National Housing Strategy—Innovation and Research Program Descriptions

Over the next ten years, \$241 million will be invested under the NHS in new data collection tools, demonstration projects and solutions labs, and efforts to spur more housing-related research to help diversify information sources and perspectives. Each of the NHS Innovation and Research programs has a specific purpose and it is important that applicants apply to the one that is the most relevant. Here are some brief descriptions of the programs that receive applications on a yearly basis. More information can be found in the links provided.

The **Solutions Labs** initiative provides housing stakeholders with funding and expert innovation lab consultants to help solve complex housing problems using innovation methods and tools.

The **NHS Research and Planning Fund** provides funding for not-for-profits and non-governmental organizations (NGOs) (housing providers, charities, Indigenous governments/organizations, etc.) to undertake housing-related research or research planning activities.

The **NHS Demonstrations Initiative** is for organizations that partner with affordable housing providers to showcase innovative practices, technologies, programs, policies and strategies.

The **CMHC Housing Research Scholarship Program** builds Canadian expertise and promotes excellence in housing research by providing financial assistance to post-doctoral fellows undertaking housing research through partnerships with the Canadian Institutes of Health Research, the Social Sciences and Humanities Research Council, and the Natural Sciences and Engineering Research Council.

The **Housing Research Awards** recognize world-class housing research being conducted in Canada and provide funding for research teams to promote and expand their work.

The **Expert Community on Housing (ECOH)** is a collaborative, online network of housing experts that is about sharing housing knowledge and contributing to the development of housing solutions. Applicants to all Innovation and Research programs are encouraged to be part of this network.

## Initiative Overview

The Solutions Labs initiative provides housing stakeholders with funding to help solve complex and persistent housing problems and foster innovation in the housing sector. Solutions Labs co-develop innovative, bottom-up solutions to specific problems that have not been able to be solved using traditional approaches. Solutions Labs funding will focus on:

- resolving **affordable housing problems** within the National Housing Strategy's key **priority areas** and/or priority vulnerable populations;
- targeting the rapid creation of solutions such as technologies, policies, programs or standards;
- gathering a wide range of stakeholders, including those with lived experiences, to find solutions that are practical, replicable, implementable and deliverable within a realistic time frame;
- requiring inclusion of Solutions (Social Innovation) Lab expertise to advise on the design and delivery of the lab in order to achieve the desired results; and
- applying innovation lab tools and methods commonly used to solve persistent and complex affordable housing problems.

Characteristics of Social Innovation Labs or Solutions Labs for the purpose of this program:

- Aids the move from round-table talks to action, a promising approach has emerged in the social innovation ecosystem.
- Draws on the strengths, empathy, creativity, and wisdom of a collective to explore new ways of making progress on a complex housing problem.
- Creates a safe zone for a collective to explore, question assumptions, be bold, be agile enough to adapt as learning emerges and experiment with solutions.
- Convenes diverse perspectives on an issue, gains insight from people with lived experience of a problem, facilitated ideation, building prototypes of solutions, and tests them to see how they work on the ground with people.
- As evidence emerges of what prototyped solutions are working, solutions can be scaled and spread to impact systemic change.

(Ben Weinlick, 2017)

NHS Solutions Lab teams will be comprised of the following:

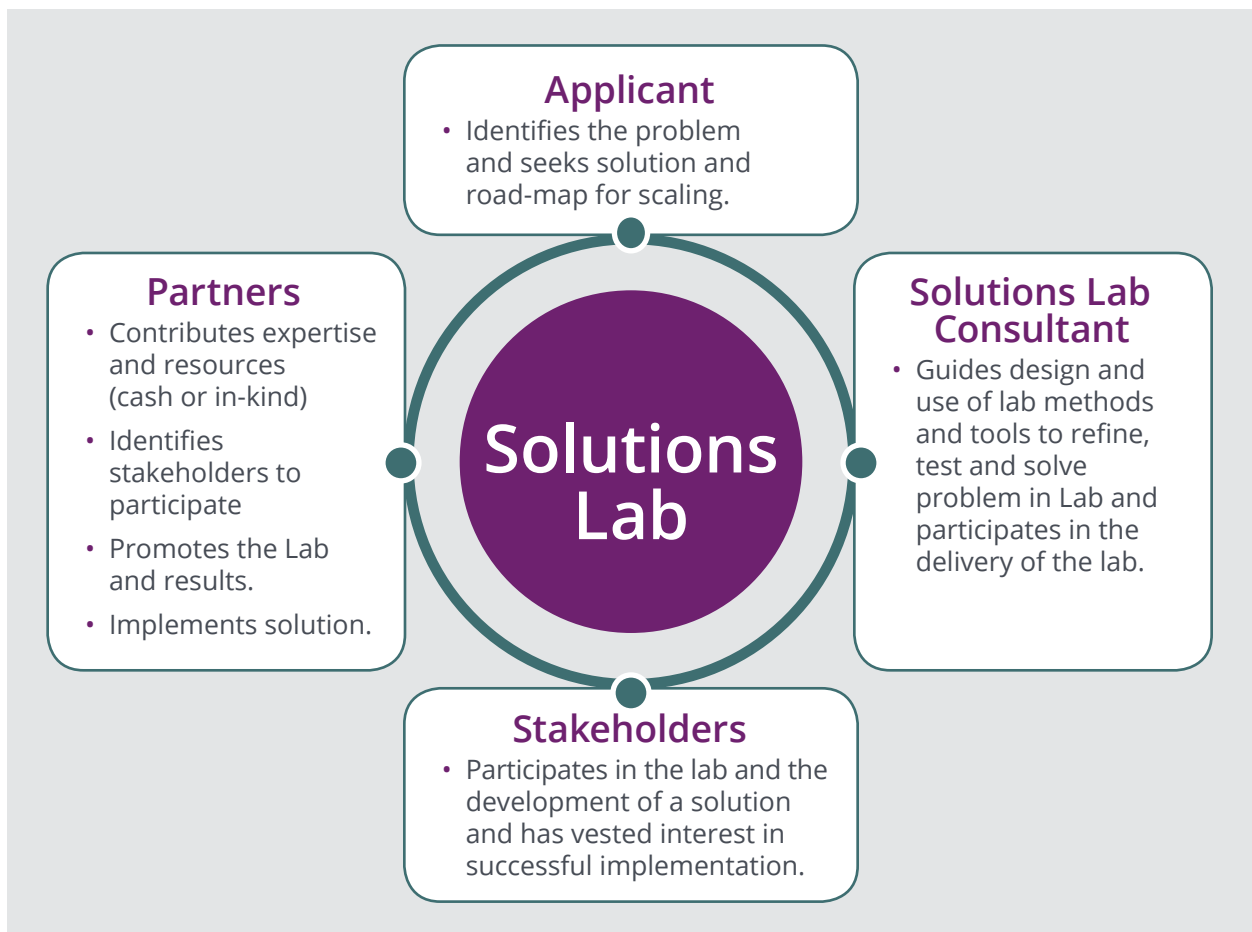
1. **Applicant.** The applicant will be the organization who has identified the affordable housing problem that needs to be addressed and listed in section 1.1 of the application form. The main role of the applicant is to seek out partners when relevant, confirm the problem to be addressed and develop clear problem statement with the consultants input.
  - Provide input and agree on the consultants proposed design and implementation, including methods and tools for the Lab. Select SL consultant. Confirm working relationship before application starts.
  - Determine who does what for writing the application.

2. **Partners.** Partners are defined as those individuals and organizations that will fund, sponsor and support the project and have an interest in the results. They have an interest in solving the problem identified, providing potential solutions and bringing an added value to support the applicant. They would also support scaling and implementation of solution.
3. **Solutions Lab consultant.** A Solutions Lab consultant is required as part of the project team and is someone with expertise and experience (see appendix 3 for minimum requirements) in designing and delivering the methods and tools used in innovation labs. The main role of the consultant is to guide all participants, applicant, partners, stakeholders, etc. to provide necessary input on defining problem, developing ideas on prototypes, experimenting on and testing solutions and end products, including roadmaps/blueprints. Use best innovation lab suited tools, etc.

In addition, applicants should consider inclusion and participation from a wide range of stakeholders with diverse perspectives that can contribute to and support the implementation of solutions that are developed post-project completion. Stakeholders can bring valuable ideas, expertise, backgrounds and knowledge on the particular issue identified and to be addressed (including academia, government officials, subject matter experts, NGOs, private sector, and particularly the end user—those with lived experience).

See figure 1 below.

**Figure 1—NHS Solution Lab Structure**



## Additional Guidance on the Solution Lab Consultant Role

### ***Why do applicants require a Solutions Lab consultant?***

***The emphasis of the Solutions Lab funding is to help housing stakeholders tackle complex and persistent housing problems for which normal approaches have not yielded solutions. The expectation is that stakeholders tackle a problem through an innovation lens and the methods and tools that have emerged from social innovation labs.*** The program requires applicants to seek out and partner with experts in the design and implementation of innovation labs on their team. Applications will be evaluated on the innovation approach proposed and the innovation tools and methods used to solve the problem. It is highly recommended to have the Solutions Lab consultant involved as early as possible in the development of the proposal and developing the approach that will be used in problem definition, project scoping and writing of the proposal. CMHC has identified and vetted a number of Solutions Lab consultants who can play this role for the applicant. However, the applicant has the option to use other similarly qualified innovation consultants if they prefer.

**Note:** It is the applicant's responsibility to seek out and obtain an innovation consultant.

The following information provides some definition of the expected and possible roles the innovation consultant can play:

### ***Minimum Expected Role for the Innovation Consultant***

- Advise on the design of the Solutions Lab, including methodology and tools.
- Contribute to or write the section on tools and methods in the application.
- Deliver technical innovation aspects of the activities in the Solutions Lab.
- Contribute to any reports on results of the Lab, etc.

### ***Negotiable Based on the Applicant's and their Partners' Needs/Capacity***

- Write and/or coordinate the writing of the proposal submission.
- Manage the project and coordinate activities, if funded.
- Provide subject matter expert advice, analysis, etc.
- Undertake research as required to support the Lab.
- Report writing and knowledge product development.
- Act as the lead party on contract and for the administration of financial or budgetary responsibilities on behalf of applicant. (This may be useful for some organizations where contractual requirements, for example, insurance requirements and/or time and resources are limited.)

### ***Role played by CMHC in the Program***

- Funds Solutions Labs.
- Evaluates the submissions
- Acts impartially.
- Cannot be listed as a formal partner in an applicant's submission.
- Can be listed as a stakeholder who participates in and contributes to the Lab, if successful.
- Cannot comment on the content of the submissions while the application period is open.
- Can comment on requests for the clarification of the application process and/or answer application questions.



## ***The Lab (The Project)***

The Lab should be considered a complete end-to-end approach to a project, not just a face-to-face event or planning and consultation meetings in a physical or virtual space—it includes all aspects of the project using an innovation approach to achieve a solution and roadmap applicable to solving a complex housing problem.

Under the NHS, CMHC will support Solutions Labs ranging in duration from one to three days (Lab sprints) to up to 18 months. Solutions Labs can be held anywhere across the country and seek to find innovative solutions to a range of housing problems under NHS priority areas and populations listed in appendix 1. Through the Solutions Lab process, prototype solutions can also be tested to assess feasibility, applicability and potential uptake.

Depending on scope, complexity and duration, Solutions Labs can follow the proposed innovation methodology below that includes a toolkit of generally accepted best practice activities:

- **Definition**—establish scope and reframe the problem.
- **Discovery**—generate insight through big data and user insight.
- **Development**—co-develop new ideas through stakeholder input.
- **Delivery**—test and refine shared ideas and proposals.
- **Roadmap**—communicate clear path to solution uptake.

Applicants may propose alternative methods or strategies that best meet their needs and offer the best chances of success. Further detail can be found in appendix 2.

## **Useful Resources**

Additional information regarding Solutions Lab consultants, as well as resources on innovation methods and tools used in Solution Labs can be found at <https://www.cmhc-schl.gc.ca/en/nhs/solution-labs>.

## **Application Intake Process—Inclusion of Solutions Lab Consultant**

CMHC is seeking detailed proposals that explain how the Solutions Lab applicant, their partners and solution lab consultant, will work together to identify, refine and develop solutions to a key housing issue, problem, challenge or opportunity within an NHS priority area theme and priority population.

Applicants must include a Solutions Lab consultant versed in designing and delivering Solutions Labs, as outlined in appendix 2. CMHC has a list of 6 vetted and approved Solutions Lab consultants that applicants may choose to contact. However, applicants may identify and include other Solutions Lab consultants not on the CMHC list in their applications. In either case, applicants should work with the Solutions Lab consultant to develop the proposal and submit the application.

**Note:** Applications that include Solutions Lab consultants not on the CMHC list must provide additional details on the Solution Lab consultant's background, expertise and ability to provide Solutions Lab consultations.



## PART 2 – APPLICATION AND SUBMISSION INSTRUCTIONS

### Overview

The purpose of part 2 is to inform applicants about CMHC's procedures and rules pertaining to the application process.

This applicant guide provides information, to assist the applicants in presenting a complete response that includes all the mandatory requirements (as indicated below). Non-compliance with a mandatory requirement will result in the application being eliminated from further consideration.

### Submission Instructions and Deadline (mandatory)

The purpose of this section is to inform applicants about CMHC's procedures and rules pertaining to the application process. It is useful to consult this section prior to submitting an application to make sure that the response is complete and includes all the mandatory requirements (as indicated below).

### *Language of Application*

Applications may be submitted in English or French.

### *Delivery Instructions and Deadline*

The NHS Solutions Labs application form and the intake portal for submitting the NHS Solutions Labs application form (including all supporting documentation) can be accessed at <https://www.cmhc-schl.gc.ca/en/nhs/solution-labs>.

**Note:** The portal to upload your completed application will be open on July 2, 2019.

For any issues related to the Application portal, please contact technical support at 1-800-668-2642 (business hours (ET): 7:30 a.m. to 7:30 p.m.)

In the event that the platform for submitting an application cannot be accessed, such as in remote regions for example, it will be possible to send proposed solutions labs 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 pickup to ensure the application is received by CMHC ahead of the closing date and time.

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. Therefore applicants should consult with CMHC at [Innovation-Research@cmhc-schl.gc.ca](mailto:Innovation-Research@cmhc-schl.gc.ca) before submitting an application by mail.

Timely and correct submissions of NHS Solutions Labs applications in the exact specified delivery platform is the sole responsibility of the applicant. All risks and consequences arising from 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 time recorded by the CMHC system receiving the application, and not the time the application was sent by the applicant.

Upon receipt of an application, an automated confirmation will be issued by CMHC to the sender's email address. It is strongly recommended that applicants follow up by email to **Innovation-Research@cmhc-schl.gc.ca**, should they not receive a confirmation within 30 minutes of submission.

Only applications submitted via the NHS Solutions Labs 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.

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

**Note:** Information on the deadline for submissions can be found at **<https://www.cmhc-schl.gc.ca/en/nhs/solution-labs>**.

All Solutions Labs applications received on or before the closing date and time specified below, will be opened and reviewed for verification by CMHC. If at that time, CMHC is unable to open the application, the applicant will be so advised and provided an opportunity to resubmit a version that can be opened within 2 hours of notification.

Your application must be submitted and received at the location specified in the "Delivery Instruction and Deadline Section" on or before the submission deadline.

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

### ***Inquiries***

All questions regarding this application (including contacting a Solutions Lab consultant) must be sent by email or facsimile to **Innovation-Research@cmhc-schl.gc.ca**

Changes to the Applicant Guide document will only be effective if issued by CMHC in writing as described below. Applicants are therefore strongly cautioned to request that all clarifications, directions and changes to the application process provided by CMHC be 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 facsimile or email. 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 application process as a result of any inquiry or for any other reason, an addendum to this application process will be provided to applicants by facsimile or email.

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 **7 calendar days** prior to the submission deadline.

### ***Communication***

During the application evaluation period, 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.

### ***Applicant Contact***

The applicant identified in section 1 .1 of the application form, including name and contact information shall be the primary contact for CMHC during the evaluation period.

### ***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 90 days following the application submission deadline.

### ***Changes to Application***

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.

Changes to an application is 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.

Any addendum, clarification, or new application must be submitted as per the delivery instructions outlined in the guide, be clearly marked "REVISION," and be received no later than the submission deadline. Where the new application is intended to replace all or part of an earlier application, it must be accompanied by a clear statement specifying the sections of the earlier application that are replaced by the new application.

### ***No Liability***

While CMHC has made considerable efforts to ensure that the information in this applicant guide 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 applicant guide, 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 application. 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 application 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 application or any resulting award of an 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.

### ***Verification of Application***

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

### ***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.

### ***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 (for example, 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.

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

The applicant and its principals, employees and agents shall avoid any real, potential or apparent conflict of interest during the application 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 application or to terminate the resulting agreement. Upon such elimination or termination, CMHC shall have no obligation of any nature or kind to the applicant.

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

By issuing this **Solutions Labs application** intake process 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.

## PART 3 – APPLICATION FORM GUIDE

### How to Apply

The NHS Solutions Labs application process involves an online application intake process. See “Delivery Instructions and Deadline” in part 2 of this guide for information on obtaining an application form and accessing the intake portal for submitting an application.

The application form must be submitted in accordance with the conditions and requirements (as set out below) in order to be considered for evaluation by CMHC. In preparing and submitting an application for a proposed Solutions Lab, the applicant must consider the following eligibility requirements under the Solutions Labs initiative:

#### ***Eligible Solutions Lab Projects***

Under the Solutions Labs initiative, CMHC will support and leverage Solutions Labs that are aligned with federal NHS priorities, including addressing problems associated with housing for priority populations in greatest need. To be eligible for funding under the Solution Labs funding, projects must be compliant with the following required objectives:

- Be aligned with and address issues under the NHS priority areas.
- Bring together a wide range of stakeholders to provide adequate representation to the issue at hand, including those with lived experiences.
- Seek to find solutions that are practical, replicable, implementable and deliverable within a realistic time frame.
- Target the creation of solutions for technologies, policies, programs, standards and other such tools that can advance the overarching goals of the NHS.

To be eligible for funding under the Solutions Labs initiative, projects must also be compliant with the following requirements:

- Applicant lead must be a Canadian citizen. The Lab team must include a majority of Canadian representation.
- Activities must address an issue pertinent to Canadian housing. Labs must physically take place in Canada.
- Individuals and teams may submit only one Solutions Lab issue per submission. However, they are permitted to present more than one submission, for example, on a separate issue.
- Solutions Labs must be delivered and completed within an 18-month time frame.
- Project teams must include a Solution Lab consultant. Note that the degree of effort made by the Solutions Lab consultant to design and deliver innovation methods and tools should be considered a substantial project cost and is an eligible cost of Solution Lab project funding.

### ***Eligible Solutions Lab Activities***

Eligible activities include the following:

- Travel, accommodation and per diem for project team participants, Solutions Lab consultant costs.
- Solutions Lab activities, including event coordination, background research, Solutions Lab engagement and facilitation activities, material development, summary reporting and development of summary roadmap report on prototype to uptake.

### ***Ineligible Solutions Lab Activities***

The following provides examples of activities that are not eligible for funding under the Solutions Labs initiative:

- Funding for physical Solutions Lab construction, alterations to existing Lab space.
- Activities related to post-prototype concept to market development for technology solutions.

## **Application Form—Section 1—General Information**

General information regarding the proposed Solutions Labs, including the identification and contact information of the applicant, as well as the key personnel representing the Solutions Lab consultant, project partners and other contributors to the proposed Solutions Lab is required in section 1.

### ***Application Form—Section 1.1 Eligible Applicants***

Section 1.1 is intended to identify applicant contact information, the name of the project and the duration. Eligible applicants listed in section 1.1 include the following:

- Affordable housing providers
- Government agencies—Federal, provincial, territorial, municipal
- Indigenous organizations—Métis, First Nation, Inuit
- Agencies and NGOs involved in NHS priority area activities—seniors associations, veterans associations, mental health advocates, homelessness hub, non-profit organizations, sustainability agencies
- Academic institutions involved in NHS priority area activities and audiences
- End users, individuals with lived experiences that can provide first-hand expertise to the co-development of solutions
- Private sector stakeholders—builders, developers, designers, planners, etc.

### ***Application Form—Section 1.1 Solutions Lab Initiative Eligible Time Frame***

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

***Application Form—Section 1.2 Solutions Lab Solution Type***

While it may not be possible to confirm at this time the exact solution to the proposed issue or problem identified, the applicant can identify potential solutions that may arise from the proposed Solutions Lab, such as a technology, practice, policy, program or strategy. The applicant can select “Other option,” but must provide a clear description.

***Application Form—Section 1.3 Solutions Lab Relevance to NHS Priority Areas***

The applicant will check which NHS priority areas (as outlined in appendix 1) the Solutions Lab intends to address.

In the provided section, the applicant will describe how the outputs from the proposed Solutions Lab will align with the identified NHS priority area(s). The applicant will clearly describe how the solution or opportunity targeted by the Solutions Lab will benefit or address issues or challenges within a given priority theme area. What will be the potential outcome or impact? The applicant should emphasize the *primary priority* area the solution will address and distinguish between other secondary priority areas.

**Note:** If it is unclear what the primary priority area that is being addressed the applicant risks receiving a lower score.

***Application Form—Section 1.4 Solutions Lab Relevance to NHS Priority Populations***

In this section, if relevant, the applicant describes which applicable NHS priority population(s) the project is aligned with (see appendix 1 for more information). They must emphasize the primary priority population that the project intends to address. If there is more than one population, they should indicate any differences regarding the anticipated benefits or impact. The applicant will clearly describe how the outputs from the proposed Solutions Lab will benefit the identified NHS priority populations. What will be the potential outcome or impact?

***Application Form—Section 1.5 Solutions Lab Alignment with NHS Expected Outcomes***

In this section, the applicant will describe how the proposed Solutions Lab will support or contribute to the identified NHS expected shared outcomes (see appendix 1 for more information).

The applicant will clearly describe how the outputs or benefits from the Solution Labs will contribute to one or more of the NHS shared outcomes and should consider the potential short, medium and long-term impacts as well as the scale of that impact (local, regional, national).

***Application Form—Section 1.6 Solutions Lab Indigenous Nations Consultation***

If the proposed Solutions Lab intends to address an issue specific to First Nations, Métis, or Inuit nations then consultation may be required. The applicant must identify which Indigenous nations would be impacted by the proposed Solutions Lab, the engagement process to be used, confirmation of ethics guidelines to be followed, and provision of Indigenous representation as part of the Solutions Lab team.



## Application Form—Section 2—Project Details

**Note:** It is strongly recommended that the applicant select their expert innovation consultant before the development and completion of the application in order to ensure that problem definition, innovation methodology and subsequent activities are designed to reflect the Solutions Lab initiative objectives and allow for the best possible chance of success in the evaluation process.

In this section, the applicant must clearly identify and describe all key activities, innovation methodologies and tools to be used during the Solutions Lab, number and location of engagement events, and team participation. The applicant shall clearly describe what is the problem being addressed and how the proposed Solutions Lab will be undertaken to address the problem. Clearly indicate how Lab activities align to the proposed methodology outlined in appendix 2. Provide an overview of all key activities and tasks to be undertaken during the project. Identify the anticipated duration of the project, number of face-to-face (lab) events, location of Lab events, travel requirements; background research requirements (for example, literature reviews, ethnographic studies, etc.). Describe the different phases, milestones, tasks, activities, and any stage gates or dependencies. Describe the expected deliverables (for example, reports, profiles and other documentation, roadmap, videos, web content, presentations, papers) and the expected outcomes of the Solutions Lab. The phases/activities of the Solutions Lab must align with the milestone activities listed in section 2.5, including knowledge products and knowledge dissemination activities.

### ***Application Form—Section 2.1 What Is the Housing Problem You Are Trying to Solve? (250 words maximum)***

In this section, please clearly describe the housing problem that the project team proposes to explore and resolve through a Solutions Lab process. Provide a brief discussion regarding the scope, depth, pervasiveness and complexity of the problem to be solved. Please also describe why a Solutions Lab process is needed to help advance solutions to the problem and why the problem has not been resolved using traditional approaches. How can a Solutions Lab lead to the development of a unique, innovative solution that might not otherwise be developed using traditional approaches?

### ***Application Form—Section 2.2 Solutions Lab Methods and Tools (500 words maximum)***

Please describe what unique innovation lab approach or process is proposed, as well as related innovation tools and expertise that will be undertaken to address the problem. Please describe how they will contribute to a solution being developed? Clearly indicate how the method used and lab activities align to or deviate from the proposed methodology outlined in appendix 2. Please seek out advice from your Solutions Lab consultant to assist you with designing the best approach and using the relevant and appropriate innovation tools that will facilitate a solution.

***Application Form—Section 2.3 Solutions Lab Milestone and Key Activities (500 words maximum)***

This section is intended to provide context and describe the key activities, milestones and expected outputs of the Lab and when they will occur. Describe the different phases, milestones and timing, tasks, activities, and any stage gates or dependencies. Describe the expected deliverables (for example, reports, profiles and other documentation, roadmap, videos, web content, presentations, papers) and the expected outcomes of the Solutions Lab. The phases/activities of the Solutions Lab must align with the milestone activities summarized in the table in section 2.5 below.

***Application Form—Section 2.4 Solutions Lab Knowledge Products and Knowledge Sharing (500 words maximum)***

The applicant must clearly describe how knowledge gained, lessons learned and solutions developed from the Solutions Lab will be communicated to targeted audiences, including information product development, audience determination and dissemination channels to be used.

This includes activities as the Solutions Lab is being performed and after the Lab has been completed. This is not a promotional plan but rather a plan that describes how the information and knowledge products generated over the course of the Solutions Lab will be transferred to raise awareness, knowledge and support further development of the solution developed through the Lab process. The plan will detail what information products will be developed, audiences targeted, channels to be used to reach the audience and what activities will be undertaken at various times throughout and after the Solutions Lab. The descriptions must align with the knowledge products and knowledge dissemination activities summarized in the table in section 2.5 below.

***Application Form—Section 2.5 Work Plan and Funding Requested***

In this section, the applicant must summarize, in the table provided, key activities, milestones, outputs or deliverables, knowledge products and knowledge transfer activities that are described above in sections 2.3 and 2.4. If the applicant chooses to use a different approach to the phases described in column 1 of the table, they must indicate the changes to that approach in the first column labelled Phase. Full descriptions of each activity are not required if the activities listed are described in sections 2.3 and 2.4.

**Application Form—Section 3—Project Collaboration**

In this section the applicant is to provide information regarding the proposed Solutions Lab project partners and team members, including respective contributions to the Solutions Lab activities.

There are no restrictions in the Solutions Labs 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 Solutions Lab project.

### ***Application Form—Section 3.1 Project Partners***

Partners are defined as those individuals and organizations that will fund, sponsor and support the project and have an interest in the results. They are not necessarily members of the project team that conduct the actual Solutions Lab.

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

- How well do the proposed project partner’s needs, interests and mandates align with the Solutions Lab objectives (that is, are they a good fit)?
- Does the support of the partners demonstrate the need for the Lab solution to the problem?
- Do the partnerships strengthen leveraged outcomes through collaboration?
- Are the partners critical to the success of the Solutions Lab?

Please list all partners (individuals, companies or organizations), including the applicant, and explain the nature of each organization’s role in, and contribution to, the project (including but not limited to human resources, collaborations with other organizations, outsourced work, consultants, subject matter experts, professional services, etc.). Please indicate why these partners are involved, what value they bring to the project; how might they be involved in further deployment of the solution and its blueprint. Partner contributions, including the estimated value of in-kind contributions and funding amounts will be asked for in section 4.2. As part of its due diligence process, CMHC may contact these other potential partners and collaborators. If you do not want CMHC to contact these organizations, please provide your reasoning below.

### ***Application Form—Section 3.2 Solutions Lab Team Members***

The applicant must clearly identify all proposed team members including the Solutions Lab consultant. Member expertise and experience must be included to ensure necessary capacity to advance the Solutions Lab to completion.

### ***Application Form—Section 3.3 Solutions Lab Consultant***

The objective of the Solutions Labs is to provide funding and expertise to housing stakeholders to tackle complex housing problems for which normal approaches have not yielded solutions, using innovation methods and tools. The program requires applicants to include experts in the design and implementation of innovation labs on their team. **Note: it is the applicant’s responsibility to seek out and acquire a Solutions Lab consultant.** Solutions Lab consultants may be chosen from the CMHC list of consultants provided to applicants or applicants may elect to work with other Solutions Lab consultants not on the CMHC list. Solutions Lab consultants are experienced in the design and delivery of innovation labs and can provide invaluable guidance and support to project design to achieve results and to solve the applicants’ housing problem. Suggested roles regarding the relationship between the applicant and the Solutions Lab consultant are outlined in the “Overview” section of the guide.

The applicant must identify the Solutions Lab consultant who will be part of the applicant's Solutions Lab team in section 3.3. ***Please note Solutions Lab consultants on the CMHC vetted list have previously been evaluated for their expertise and ability to undertake Solutions Lab activities.*** Other consultants identified by applicants who are not on the CMHC vetted list will be evaluated as part of the application intake process based on their responses in section 3.4. CMHC strongly encourages applicants to begin selecting a Solutions Lab consultant prior to beginning an application. Applicants can also provide to CMHC the necessary information required in section 3.4 at any time before the closing date for submissions so that CMHC can confirm the consultant will meet the minimum requirements. Information on the criteria used to assess Solutions Lab consultants' experience and expertise can be found in appendix 3 of the Guide.

## **Application Form—Section 4—Project Funding**

Specific information regarding the proposed Solutions Lab budget and funding sources are to be provided in this section.

Applicants applying for funding or receiving funding from other institutions, organizations, programs, etc., are eligible to apply for Solutions Labs initiative funding; stacking and leveraging of funds to undertake Solutions Lab projects are permitted.

- Applicants must indicate any additional funding that they have applied for, been approved for, or have received to support the proposed Solutions Lab project. Applicants will also indicate partner and team member funding and include any other funding received or applied for from other NHS initiatives (for example, Affordable Rental Housing Innovation Fund [ARHIF], the National Housing Co-investment Fund, Federal Lands Initiative, Technical Resource Centre [TRC] and Rental Construction Fund [RCF]).

During the application evaluation, consideration may be given to the dependency on external (or third-) party funding arrangements or approvals to realize the undertaking and completion of the proposed Solutions Lab project. Letters of confirmation of funding can be included as attachments and uploaded as part of the application.

### ***Application Form—Section 4.1 Solutions Lab Total Project Costs***

In this section, the applicant must provide a summary of Solutions Lab activities and associated costs. Please include total estimated costs of each activity and the requested amount from CMHC that will contribute to that activity. Please provide a brief bullet description of the costs. Please indicate anticipated timing of costs by fiscal quarter over the duration of the project. See the table in section 4.1 of the application form.

### ***Application Form—Section 4.2 Solutions Lab Proposed Funding Contributions***

The applicant must clearly identify all proposed and confirmed funding contributions to the Solutions Lab including in-kind support. This should include the amount requested from CMHC as well as amounts from other organizations. The form will automatically calculate the total project cash contributions and the per cent cash from CMHC.

## Application Form—Section 5—Project Viability to Proceed

In this section, the applicant is to provide brief information on the potential risks of the proposed Solutions Lab and the strategies to address them.

### ***Application Form—Section 5.1 Solutions Lab Success Risks***

The applicant must identify any potential project dependencies and risks that may impact the success of the Solutions Lab and describe the proposed strategies to mitigate these risks.

The applicant must identify any potential operating risks that may impact the success of the Solutions Lab, including policy and regulatory barriers, unintended consequences due to Solutions Lab activities, impact of potential failure of Solutions Lab, etc. and identify proposed strategies to mitigate these risks.

## Application Form—Section 6—Applicant's Attestations

In this section, the applicant provides their signature confirming the terms outlined within this section.

# PART 4—SELECTION PROCESS

The purpose of section 4 is to give the applicant an overview of the selection process once CMHC has received your application.

## Assessment of Eligibility

Applications will be reviewed in the subsequent months after the application deadline with an anticipated notice of decision in fall 2019. CMHC staff will first examine the application to ensure that the applicant meets the eligibility requirements and that it is complete. CMHC will only contact the applicant to let them know if their application is not eligible to move on to the review committee.

## Evaluation Committee

An evaluation committee made up of subject matter experts will evaluate all eligible applications using pre-established evaluation criteria and scoring scale. Only those applications that score higher than 80% will be considered for funding depending on budget availability. This translates to approximately 8 to 12 projects receiving funding.

## Evaluation Criteria and Scoring Scale

Applications are assessed by an independent evaluation committee. There are two parts to the evaluation criteria: (1) point value from 0 to 3, and (2) an assigned weight of importance:

### ***Point Values***

- **0 - Insufficient**—Does not provide relevant response, poorly described or unclear.
- **1 - Satisfactory**—Partially complete response or insufficient answers, some unclear answers.
- **2 - Good**—Sufficiently answered question, clearly described and understood, demonstrates generally expected responses, thinking and impact.
- **3 - Excellent**—Outstanding and exceptional answers above normal expectations, demonstrating substantial thought and potential impact.

## Point Values and Weighted Values

The following describes the maximum points available per section and the maximum weighted values applied to each section.

Application Form Section	Points (0-3)	Weighted % Value
<b>1.3 Project Relevance to NHS Priority Area</b> —Does the response provide sufficient information on the relevance of the proposed Solutions Lab to an NHS priority area?	0-3	10
<b>1.4 Project Relevance to NHS Priority Populations</b> —Does the response provide sufficient information on the relevance of the proposed Solutions Lab to an NHS priority population?	0-3	10
<b>1.5 Project Alignment to NHS Expected Outcomes</b> —Does the response provide a sufficient answer regarding benefits of the Lab and which NHS outcomes it hopes to support and what the potential impacts might be? (potential short-, medium- and long-term impacts as well as the scale of that impact [replicable at the local, regional, national level])	0-3	10
<b>2.1 What is the Housing Problem?</b> —Does the response clearly explain the problem. Does the response clearly describe the complexity (depth, pervasiveness and scope of the problem). Does it provide an explanation on why a Solutions Lab process is needed to solve the problem and why the problem hasn't been resolved using traditional approaches. Explain how the proposed Solutions Lab activities will adequately solve the problem.	0-3	5
<b>2.2 What Are the Solutions Lab Methods and Tools?</b> —Is the process clearly described and does it reflect current expectations regarding innovation labs. Are the methods and tools described and are they reasonable given the problem to be addressed in the Lab?	0-3	10
<b>2.3 Solution Lab Milestone Activities and Key Activities</b> —Does the response provide a thorough and well-constructed plan that describes the key activities, milestones and outputs that support the Lab description? Are the proposed timelines reasonable?	0-3	10
<b>2.4 Solutions Lab Knowledge Products and Knowledge Sharing</b> —Does the knowledge dissemination plan provide a thorough and well-constructed overview that will effectively raise awareness in the sector that fosters the uptake of the innovation(s) or solutions achieved within the Lab? Are the knowledge products, dissemination channels and target audiences reflective of the stakeholders that will be affected by this solutions lab?	0-3	10
<b>2.5 Work plan</b> —Is the Work Plan sufficiently detailed and does it provide a well-constructed overview of the Lab from end to end (logical, clearly written, realistic timelines and results).	0-3	10
<b>3.1 Project Partners</b> —Do the proposed partners bring value to the project, are their roles clear, and is there an adequately diverse representation to address the issue or problem effectively?	0-3	5
<b>3.2 Solutions Lab Team Members</b> —Does the list of team members provide adequate diverse expertise from various groups to truly address the particular problem/issue at hand? Are roles of the team clearly described? Has a Solutions Lab consultant been confirmed and meets minimum requirements? Is there evidence that the team can work effectively to deliver the Lab?	0-3	10
<b>4.1 and 4.2 Project Costs and Contributions</b> —Is the proposed budget clear and realistic with respect to costs and timing? Are there other cash or in-kind contributions from partners?	0-3	5
<b>5. 1 Project Viability</b> —Are the potential risks that may impact the success of the Solutions Lab, including policy and regulatory barriers, and unintended consequences, clearly identified and explained and proposed strategies to mitigate these risks presented?	0-3	5
<b>Maximum total score</b>	<b>36</b>	<b>100%</b>

## APPENDIX 1—NATIONAL HOUSING STRATEGY PRIORITY AREAS

Please go to <https://www.cmhc-schl.gc.ca/en/nhs/guidepage-strategy> for more detailed information regarding the NHS targets, outcomes, NHS priority areas and the NHS priority population groups.

### National Housing Targets

The NHS sets ambitious targets to ensure that unprecedented investments and new programming deliver results. This includes:

- cutting chronic homelessness by 50%;
- removing 530,000 families from housing need;
- renovating and modernizing 300,000 homes; and
- building 100,000 new homes.

Ultimately, the strategy will promote diverse communities and create a new generation of housing that is mixed income, mixed use, accessible and sustainable.

### NHS Shared Outcomes

Overall, the NHS has 9 shared outcomes:

- Homelessness is reduced year over year.
- Housing is affordable and in good condition.
- Affordable housing promotes social and economic inclusion for individuals and families.
- Housing outcomes in Canada's territories are improved year over year.
- The housing needs of Indigenous groups are identified and improved.
- Affordable housing contributes to environmental sustainability.
- The National Housing Strategy contributes to Canadian economic growth.
- Partnerships are built, strengthened and mobilized to achieve better outcomes.
- Collaboration/alignment across the federal government results in more holistic responses to housing problems.



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.

In order to align the Solutions Lab project proposals within the NHS, CMHC is seeking applications for Solutions Labs to study and seek to develop solutions to issues that fit within the following NHS priority areas:

## Priority Areas

### Housing for those in greatest need

- Improve housing and supports for the most vulnerable, including those who are homeless and those with distinct needs.
- Improve affordability of housing for low-income households.

### Community housing sustainability

- Improve sustainability of social housing and build capacity.

### Indigenous housing

- Improve housing conditions among First Nation, Métis and Inuit households.
- Increase Indigenous autonomy and capacity for housing.

### Northern housing

- Improve housing conditions in Canada's northern territories and regions.

### Sustainable housing and communities

- Improve building performance, durability and energy efficiency of housing.
- Increase housing options near transportation and transit, work, supports and services, as part of mixed-income, age-friendly, accessible communities.

### Balanced supply of housing

- Increase Canada's supply of rental housing.
- Preserve and renew existing rental housing.
- Meet evolving homeownership needs of Canadians.

## APPENDIX 2—EXAMPLE OF SOLUTIONS LAB METHODS AND ACTIVITIES

### 1 *Definition*

The following Solutions Lab activities are provided to illustrate a generally accepted innovation method, structure as well as the types of activities that may be included in a funded Solutions Lab project. Applicants may propose alternative activities or strategies that reflect best practice innovation methods, meets their needs and offer the best chances of success.

Confirm commitment, funding, accountability, and project understanding by project sponsors (CMHC), Lab participants and Lab consultants.

- Confirm scope, expectations, resources, and constraints.
- Confirm nature of the issue/problem—wicked (ill-defined) or tame (well-defined).
- Develop engagement strategy.
- Recruit and confirm Lab participants.
- Develop work plan, privacy impact assessment, project charter partnership agreement and recruiting logistics.

**Deliverable:** partnership agreement, governance structure, critical path

**Outcomes and results:** clear understanding and expectation by project sponsors, Lab consultants and Lab participants

### 2 *Discovery*

- Understand the current state of the issue based on a range of research methodologies. Examples include the following:
  - Desk research and comparative analysis of existing approaches
  - Field research, ethnographic studies, shadowing, user segmentation
  - Research—site visits, interviews, co-design workshops, diary study
- Metrics research—behavioural analytics and KPIs, surveys
- Analysis—preparation, research analysis workshop, journey mapping workshop, metrics design workshop, reporting

**Deliverables:** for example, personas and scenarios, design principles, research findings report, journey maps, service evaluation form, opportunity log

**Outcomes and results:** understanding of current situation from a range of stakeholder perspectives, model meaningful metrics—understanding end-user and stakeholder needs to understand what matters.

### 3 **Development**

- Ideation—explore and co-develop potential solutions (for example, practices, policies, technologies, or processes) to accelerate improvements. Establish strategic direction for future solutions and opportunities for immediate improvement. Examples of activities include the following:
  - Workshops—logistics, supplies, participants
  - Opportunity selection and priority—prioritization tool, prototype to validate
  - Opportunity workshop—research briefing, presentation of current scenario, journey map, storyboard, evidence safari, film ethnography, etc.
  - Initial blueprint workshop—extend journey mapping with organizational layers
  - Blueprint design and development
  - Future business model workshop

**Deliverables:** for example, expanded opportunity log, feature value matrix, project model canvas—future, journey maps—future, initial service blueprint

**Outcomes and results:** alternative approach to solutions development generating a range of workshopped opportunities and options for consideration.

### 4 **Prototype and Test/Delivery**

- Make ideas tangible so they can be understood, tested, refined, and improved.
- Manage risk by creating and testing multiple solutions with end users to increase value from opportunities.
- Prototype across touchpoints, time, and levels of realism.
- Test concepts through a range of activities. Examples include the following:
  - Prototype preparation—select touchpoints and interactions, comparative evaluation, policy check-in, choose prototyping methods/media, business origami, Lego/Playmobil, role play, poster, brochure, etc.
  - Prototype design and development—refine, design and produce prototypes based on workshop, if workshop output requires additional design and production
  - Recruiting and logistics
  - Prototype testing—design review/critique, concept testing, usability testing, diary study in pilot group

**Deliverables:** for example, prototypes, evaluation reporting

**Outcomes and results:** proof of concept, risk mitigation through the exploration and evaluation of multiple potential solutions.

**5 Roadmap**

- Communicate a clear path to realize opportunities and follow vision.
- Establish shared understanding, priorities and plans through communication and visualization. Examples include the following:
  - Review prototypes
  - Blueprint finalization
  - Roadmap workshop
  - Roadmap recommendation report
  - Roadmap visualization
  - Detailed swim lanes
  - Case study submission/debriefing

**Deliverables:** for example, final blueprint, roadmap report, roadmap infographic, case study of project

**Outcomes and results:** clear set of priorities and time frames for action to deliver identified solution elements, clear connection between developed solutions and authorities having jurisdiction to implement change, clearly articulated value and benefits of solutions implementation to all stakeholders.

(Source: This list of general Solutions Lab activities has been derived from the B.C. Government Communications and Public Engagement Service Design Playbook and serves as an example only.)

## APPENDIX 3—EXTERNAL SOLUTIONS LAB CONSULTANT

To be eligible for Solutions Lab consulting services under CMHC's Solutions Labs initiative, Solutions Lab consultants must meet minimum eligibility requirements and demonstrate at least three core competency areas and one specialized knowledge area. A Solutions Lab consultant is someone with experience in the methods and tools used in innovation labs.

CMHC undertook a process to develop a list of qualified Solutions Lab consultants in the spring of 2018 to serve as a resource. The list of organizations and details provided to the applicant is available online at <https://www.cmhc-schl.gc.ca/en/nhs/solution-labs>.

Note that only Solutions Lab consultants that have not been previously evaluated and included on the CMHC vetted list of Solutions Lab consultants will be evaluated during the application intake process. Solutions Lab consultants on the CMHC list have already been evaluated and assessed as eligible to offer Solutions Lab consulting services to the Solutions Lab project team.

Solutions Lab consultants not included on the CMHC list will be screened by CMHC as a part of the application intake process to confirm they meet the minimum Solutions Lab requirement established by CMHC. Personnel proposed by the Solutions Lab consultant will also be evaluated in the core competencies and specialized knowledge area(s) as well as the projects they have completed in the last 5 years, and their relevance or transferability to housing. Recent project examples from the last 5 years that support the areas of core competency and specialization must be provided to support the evaluation and scoring of submissions by CMHC. As previously mentioned, applicants are encouraged to contact CMHC and submit their consultant requirements prior to the submission deadline.

### Minimum Eligibility Requirements of Team Members

Solutions Lab consultants must be able to provide the services of 1 or more qualified resources within the following resource category, in accordance with the mandatory qualification criteria (identified below):

#### ***Principal Lab Consultant***

- Responsible for and manages the Solutions Lab project and Lab team, ensuring that the project is developed, performed and completed within the agreed upon time, resources (including cost) and performance parameters. Has lead role in overall quality assurance for the project and may serve as primary point of contact with CMHC.

In addition to the required resource category above, Solutions Lab consultants may provide the services of qualified resources within 1 or more of the following optional or supporting resource categories identified below:

Consultant team member expertise	Member activities
<b>Data scientist, Research advisor, Ethnographic researcher</b>	Undertakes background research to support issue definition, capture of key end-user information to inform Solutions Lab discovery phase.
<b>Innovation analyst</b>	Provides strategic analysis to support lab activities and direction.
<b>Systems / Service designer</b>	Provides support for lab solutions through improved service or systems design.
<b>Stakeholder engagement specialist</b>	Ensures key stakeholders representing a diverse range of expertise, experience, and insight to an issue are brought to the lab process.
<b>Facilitation and consultation expert</b>	Provides on the ground facilitation expertise at each engagement session (lab event).
<b>Communications officer</b>	In charge of communications strategy for each phase of the Solutions Lab.
<b>Visual communications designer</b>	In charge of visual communications pieces, for example, website design, lab materials, infographics, video, etc.
<b>Technology specialist</b>	Provides digital expertise and tools utilized as part of the lab process, for example, collaborative technology, audiovisual requirements, etc.
<b>Subject matter expert</b>	Provides specialized knowledge to support background research, issue reframing and solutions generation.
<b>Service stimulation and testing analyst</b>	Optimizes opportunities identified through process mapping, tests new prototypes, models, etc.
<b>Logistical, resources, travel, technology support (administrative function)</b>	Ensures Solutions Labs are effectively organized and supported.
<b>Report writer</b>	Ensures documentation of background research, Lab activities and final reporting to CMHC.

### ***Subject Matter Experts***

- Post-secondary education (that is, degree, diploma or certificate) in the field related to their expertise; or
- A minimum of 5 years of experience working in a field related to their expertise. Examples include the following:
  - Social and affordable housing policy (Canadian and international)
  - Social policy (Canadian and international)
  - Social and economic outcomes of housing
  - Housing finance, innovative financing for affordable housing (for example, social finance, social investment funds, etc.)
  - Social return on investment
  - Sustainable housing and communities
  - Social inclusion

- Housing needs of Canadians (for example, newcomers, people with disabilities, youth)
- Housing and community development
- Housing and wraparound services
- Gender-based analysis plus (GBA+) (see definition by Status of Women Canada at <http://www.swc-cfc.gc.ca/gba-acis/index-en.html>)
- Intersectional analysis
- Seniors' housing, adaptable and accessible housing, universal design
- Indigenous housing needs, community capacity development; expertise working in Indigenous housing
- Northern, remote and rural housing
- Poverty in relation to housing deprivation
- Other specialty knowledge/experience areas offerors may have and choose to highlight

## External Solutions Lab Consultant Criteria (section 3.4 in the Application Form)

The application MUST include information about the Solutions Lab consultant's qualifications as follows:

### 1 **Detailed Description of the Firm and Service Delivery Specialization**

A detailed and relevant description of the firm and service delivery specialization as it relates to Solutions Lab and the NHS.

### 2 **Demonstrated Experience of Personnel to meet**

Principal Consultant (senior) Minimum requirement

- Post-secondary education (that is, degree, diploma or certificate) or equivalent experience in social sciences, economics, engineering, architecture, project management, design thinking, facilitation, etc.
- A minimum of 5 years of hands-on experience in Solutions Lab facilitation management, strategic design, etc.
- Experience managing at least 5 significant Solutions Lab projects.

Consultant Team Members

- Post-secondary education (that is, degree, diploma or certificate) or equivalent experience in the field related to their expertise
- Experience working on at least 3 significant projects/assignments related to their expertise in the last five years

Subject Matter Experts

- Post-secondary education (that is, degree, diploma or certificate) in a field related to their expertise; or a minimum of 5 years of experience working in a field related to their expertise.



**3** ***Descriptions of Relevant Personnel Project Experience***

Evidence of relevant experience for each proposed personnel (section 3.4) including the following:

- Duration of the project (in months or indicated by start and end dates)
- A brief description of the work performed
- The value of the work (contract or funding value)
- An identification of the client for whom the work was performed

**4** ***Sample Materials***

Evidence of relevant writing and communication ability through the provision of an example of the following:

- A Solutions Lab summary report addressing the results of either a micro or macro lab as defined herein.
- Sample of tools used within the Lab.
- Graphic or presentation materials developed during or after the Lab.
- Other pertinent materials based on the offeror's speciality.

**5** ***Pricing***

Please include a table of pricing for each team member that clearly indicates the per diem rate. This is a mandatory requirement. Failure to provide this will result in the application being deemed ineligible.

**6** ***Offeror's Qualifications***

The offeror's offer MUST include information about the offeror's qualifications as follows:

1. A detailed description of the firm and service delivery specialization.
2. Detailed resumés for all project personnel who would be assigned to the CMHC account.
3. References: A list of 5 contracts or projects of a similar size and scope which the offeror currently holds or has held over the past 5 years (section 3.4). For each contract, the following information is required: company name and address; contact person name and phone number. CMHC may approach any such contact person for information relating to the quality of services provided by the offeror.

