

COLUMBIA BASIN TRUST AFFORDABLE HOUSING WORKSHOP

SOCIETY-LED PROPOSAL MATERIAL

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DEVELOPMENT
SERVICES

Most of the material required for an affordable housing project proposal is developed collectively by the proponent society, development consultant, design specialists, and other consultants. However, there are some required components for which the operating society is primarily responsible. Your development consultant can provide guidance but will be looking to your organization to lead the following portions of the proposal, especially those related to experience, operations planning, and your commitment to equity, diversity, inclusion, and reconciliation.

STATEMENT OF NEED

Clearly describe the problem or issue you intend to address through your project. Your statement of need should be supported by relevant housing data and/or lived experience stories from your community. Reference all information appropriately.

PROJECT CONCEPT

Describe your project for funders. Include:

- Location of Project
- Size (# of units)
- Bedrooms (unit mix)
- Target Tenant Group (priority populations, income levels, etc.)
- Integrated Supports or Services (if relevant)

Your project concept should directly respond to the statement of need above. Clearly state how your project will address the community needs you have identified. Feel free to use bullets or a descriptive chart.

SOCIETY DESCRIPTION AND EXPERIENCE

Describe your society for project funders. Include information on your:

- Organization Structure (e.g., board members, committees, senior staff, departments, etc.)
- Operations Structure (e.g., operations staff and experience, operations committees, etc.)
- Current Portfolio (if relevant)
- Experience with Senior Lenders (past projects, experience with compliance reporting, etc.)

You can use a chart to illustrate your organization or operations structure. If you have multiple properties in your portfolio, you could also use a chart to describe each project, your funders, and funding programs. If this is your first project, can you demonstrate experience through your board or partners?

OPERATIONS PLANNING

An operations plan is a required component of any funding proposal. What is your property management and tenant management plan? If you have other projects, describe how do you intend to incorporate this project into existing operations. If you do not have operations experience, how will you gain it through partnerships or courses (e.g., Rental Property Management Licensing Course, BCNPHA resources, etc.) Think about:

- property management (e.g., responding to day-to-day maintenance requests and resident complaints)
- maintenance (e.g., long-term and/or seasonal maintenance)
- capital management (e.g., budgeting for long-term and seasonal maintenance and major replacements)
- resident selection (e.g., internal waitlist, BC Housing registry, selection committee, etc.)
- resident management (e.g., income testing, fostering community and connection with residents, etc.)

PROJECT PROGRESS AND TEAM

Describe your progress on the project to date. If your project is still at the conception phase, outline any partnerships you already have or intend to cultivate. Think about:

- Status of Land (e.g., site identified, land transferred, owned, leased, etc.)
- Municipal Approvals (e.g., appropriate zoning, permits issued, etc.)
- Development Consultant (if you have one or intend to procure/hire)
- Design (e.g., architect procured or not, concept design, schematic designs, building permit ready designs, etc.)
- Consulting Partners (e.g., engineers, surveyors, cost consultants, etc.)
- Building Partners (e.g., builders, construction managers, etc.)
- Funding Partners (e.g., small grantors, senior funders, local funders, society equity, etc.)

Remember: Many funding programs are targeting “shovel-ready” projects. If you are shovel-ready, make sure you demonstrate your progress! Feel free to use bullets or a descriptive chart in this section.

COMMITMENT TO EQUITY, DIVERSITY, INCLUSION, AND RECONCILIATION

Senior funders are increasingly asking for organizations to demonstrate their commitment to equity, diversity, inclusion, and reconciliation. If you have organizational policies, procedures, practices, or partnerships related to equity, diversity, inclusion, and reconciliation, describe them in this section. If not, how can you build your experience and demonstrate your commitment to these values (e.g., through partnerships or courses?)