

Required Documentation & Information Checklist

The documents and information noted below are important to support the assessment stage of the application process. For an application to be processed in a timely manner, all relevant documentation will be required.

Application

Assessment

Agreement/Advancing

If you have questions regarding the documentation requirements, please contact your CMHC Housing Solutions Specialist for support.

ORGANIZATION INFORMATION

Documentation related to the organization

- Signed Integrity Declaration available on the [CMHC website](#)¹
- Legal and beneficial ownership structures
- Organizational structure, including identification of key individuals, their responsibilities and reporting relationships (i.e., describing the relationship with associated entities/subsidiaries and identification of any beneficial owners)
- Incorporation documents
- IDs of owners and key individuals
- Details on the relevant experience of the entity/staff in relation to the proposed innovation within the industry they represent, including number of years, completed/implemented projects/programs, construction experience, projects/programs under development, and assets under management (if applicable)
- Audited financial statements for the most recent 3 years

¹ <https://assets.cmhc-schl.gc.ca/sites/cmhc/professional/project-funding-and-mortgage-financing/funding-programs/integrity-declaration-en.pdf>

INNOVATION DETAILS

All relevant documentation that supports the proposed innovation

- Innovation overview, in-depth description and evidence of innovative building technique, financing model, concept, or technology and its effects on the housing sector (e.g., lower financing, construction, operation costs, etc.)
- Impact of innovation with supporting information (e.g., feasibility study, case study, empirical evidence, proposed outcomes, detailed schedule and timelines on planning, design, execution, etc.)
- Proposed innovation-specific documentation (e.g., technical-specific, engineering reports, etc.)

AFFORDABILITY

How the proposal will achieve affordability requirements

- Outline the applicable municipal/provincial affordability definition being adhered to
- Details on the breadth of affordability
(i.e., number of affordable units and as a percentage of total units)
- Details on the depth of affordability
(i.e., affordable rent/price versus market rent/price)
- Details on the length of affordability period

FINANCIAL SUSTAINABILITY

How the proposal will achieve financial sustainability

- Demonstrate that the required financial resources are available to support the sustainability of the project
- Demonstrate how the innovation will reduce or eliminate reliance on government subsidies
- Project budget to demonstrate financial sustainability of the project

KNOWLEDGE TRANSFER

Documentation supporting Knowledge Transfer Plan and delivery of required information

Note: A consultant firm may be engaged for the creation of the Knowledge Transfer Plan.

- Details on how the proposal will support the adoption, replicability, scalability of the innovation, and on how it will capture and share information, lessons learned, and insights gained
- How it will advance the capabilities of the housing sector
- How the innovation might inform housing system participants, stakeholders and/or decision-makers, or influence the next generation of innovations to improve housing affordability
- The proposed method for measuring the success of the Knowledge Transfer Plan execution
- How will the transfer of the information be implemented (i.e., tactics to be used to communicate the Knowledge to the appropriate audience), (e.g., article, consultation, webinars, case studies, site tour, etc.)
- Details of the timelines/milestones of plan delivery at stages throughout implementation (i.e., at time of application, during funding, during implementation, upon completion, and post completion)

PARTNERSHIPS AND SUPPORT

Documentation of partnerships, supports and types required to proposed innovation implementation

- List of all forms of partnerships, whether in place or required to support the proposal, and their current statuses
- Types of partnerships including financial, non-financial, in-kind, letter of intent; associated conditions of partnership/support and timing must be provided

THE FOLLOWING DOCUMENTATION IS REQUIRED BASED ON THE TYPE OF INNOVATION BEING PROPOSED (WHERE APPLICABLE)

Energy Efficiency and GHG

- Details on how the innovation will positively contribute to **Canada's Climate Change Goals**²
- Modelling report from a qualified professional indicating targeted reduction in energy use (%) and reduction in GHG (%) achieved

Accessibility

- Details on which accessibility measures will be implemented to meet or exceed standards
- Model/demonstration of the project's accessible design and/or floor plans of accessible units
- Detailed technical details list of components of the accessible units

Priority Groups

- Detailed description of how the innovation will address the housing needs of **priority groups in Canada**³

² <https://www.canada.ca/en/services/environment/weather/climatechange/climate-plan/climate-plan-overview.html>

³ <https://www.cmhc-schl.gc.ca/nhs/guidepage-strategy/glossary>