

## 2017 APPLICATION GUIDE

This application guide identifies what types of projects are eligible for Columbia Basin Trust's Energy Retrofit Program and gives you important information on how to apply.

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## **WHAT IS THIS PROGRAM ABOUT?**

The Energy Retrofit Program (Program) is a Columbia Basin Trust (Trust) initiative and is administered and managed by BC Non-Profit Housing Association and BC Housing.

The goal of the Program is to help Basin residents have access to housing that meets their needs, including older affordable housing units that have been kept in good condition.

Selected non-profit housing organizations will coordinate and implement energy upgrades, complete associated capital replacement plans and coordinate energy audits and subsequent assessments if necessary.

The Program will have two intakes, one in Spring 2017 and the second intake likely to be held in early 2018.

## WHO CAN APPLY?

Registered non-profit organizations in good standing with the BC Registry Services who are operating housing in the Columbia Basin Trust region ([view map here](#)) may apply. Financial contributions are not made to individuals, unregistered organizations or private businesses.

## WHAT TYPES OF PROJECTS DOES THIS PROGRAM FUND?

The Program funds energy retrofits for non-profit organizations that operate affordable housing units in the Basin. The energy retrofits should enhance the quality, retention and sustainability of existing affordable housing by lowering operating costs, improving comfort level with more efficient heating systems and climate control, and assisting with long-term asset management.

- Energy retrofits should have positive returns on investment (ROI). See definitions.
- Both the non-profit housing organizations and their tenants must benefit from the energy retrofits.
- Non-profit housing organizations that receive energy retrofits under this Program should be financially sustainable and have made plans for capital replacement.
- Individual projects must also demonstrate their overall operational sustainability.
- Buildings must be at least 10 years old.

## WHAT WORK IS ELIGIBLE?

Energy retrofits that are eligible for funding from the Program include activities like improving or replacing:

- boilers
- heating, ventilation and air conditioning systems
- hot water heaters
- furnaces
- lighting
- insulation

## WHAT WORK IS NOT ELIGIBLE?

The Energy Retrofit Program does not financially support:

- Energy upgrades and/or capital repairs with committed funding that are already planned or under way.
- Energy upgrades in buildings less than 10 years old.
- Boiler projects with boilers less than 15 years old.
- Additions or new construction.
- General interior or exterior work or construction.
- Other work deemed to be inappropriate at the discretion of BCNPHA, BC Housing and/or Columbia Basin Trust.
- Project costs incurred prior to notification of funding approval

## HOW MUCH CAN I APPLY FOR?

- There is not a funding limit, but it is anticipated that individual project grants will likely range between \$10,000 and \$60,000.
- There is a desire to ensure that the Program has a broad regional impact. The total funding request to the Program and the ratio of funds requested from the Program to the overall project may be a factor in the application evaluation.

### Additional Notes

- All funds provided must be used for the purposes identified in the approved application.
- Grants will be paid in the form of a rebate upon completion and verification of energy retrofit work and required documentation. Exceptions to this may be requested subject to organizational need.

## HOW DO I APPLY?

**STEP 1:** Read this Application Guide thoroughly.

**STEP 2:** Download the Application Form at [ourtrust.org/energyretrofit](http://ourtrust.org/energyretrofit) or [bcnpha.ca/programs\\_and\\_service/CBT-ERP](http://bcnpha.ca/programs_and_service/CBT-ERP)

**STEP 3:** Complete the Application Form.

**STEP 4:** Double-check your completed application, and complete the APPLICATION SUBMISSION CHECKLIST. Contact [BasinERP@bcnpha.ca](mailto:BasinERP@bcnpha.ca) if you have questions that are holding up your submission.

**STEP 5:** Submit your application in PDF format by **June 30, 2017 @ 13:00 PT. Late submissions will not be accepted.**

**All applications must be submitted by email to [BasinERP@bcnpha.ca](mailto:BasinERP@bcnpha.ca) with the Subject line: “Basin ERP Intake 1 (*insert organization name*)”.**

A confirmation email will be sent to you.

## WHAT ELSE DO I HAVE TO KEEP IN MIND?

- Preference will be given to projects that have a high return on investment (ROI).
- Applicants are strongly encouraged to consider a variety of funding sources to contribute to the total cost of their energy retrofits, and consider how Program funding can be leveraged to generate retrofit contributions from other funders or programs.
- Energy incentive rebates through British Columbia utilities or third-party organizations may not offer the maximum incentives you may be entitled to. Certain rebates are only available through BCNPHA; contact [BasinERP@bcnpha.ca](mailto:BasinERP@bcnpha.ca) to ensure you access the best rate for your organization.
- Applicants must have the commitment and capacity to undertake energy retrofit activities.
- Ensure that you contact [BasinERP@bcnpha.ca](mailto:BasinERP@bcnpha.ca) if you have questions about completing the application by the submission date.
- Funding is limited. Some projects may not be supported as a result of receiving more requests than funding available.

## TERMS AND DEFINITIONS

**BC Housing File Reference #:** A building identifier used by BC Housing for societies that have an operating agreement.

**Donation/Fundraising:** Funds that are obtained by the housing provider through fundraising activities or donations.

**Government Funds:** Funds that are provided by local, provincial or federal governments for installing energy efficient equipment.

**Level 1 Energy Audit:** A Level 1 audit is a basic audit based on a walk-through of the facility and minimal interviews with site operating personnel to find easily identifiable areas of energy inefficiency.

**Life Cycle Replacement Plan:** A replacement plan specific to an energy retrofit's lifespan.

**Maintenance Budget:** A block of funds that are tracked by the accounting department for a specific building. The maintenance budget is broken out into smaller blocks for labour, materials, contract services and other related expenses.

**Operating Budget:** A combination of known expenses, expected future costs, and forecasted income over the course of a year.

**Return on Investment (ROI):** ROI is defined as the measure of gain generated on an investment relative to the amount of money invested. A simple formula for ROI is (total accumulated annual savings over the retrofit's lifespan / initial cost)

**ROI Example:**

Project A: Total Annual Savings (Retrofit Lifespan is 10 years at \$100 per year) = \$1,000  
Initial Cost = \$5,000  
 $(\$1,000/\$5,000) = \text{ROI} = 20\%$

Project B: Total Annual Savings (Retrofit Lifespan is 8 years at \$500 per year) = \$4,000  
Initial Cost = \$24,000  
 $(\$4,000/\$24,000) = \text{ROI} = 17\%$

Project A is preferred based on a higher ROI.

**Replacement Reserve:** Funds that are set aside for building components or equipment that will wear out and need to be replaced. Replacement reserves can be an accounting entry as a phantom expense item reducing net operating income each month, or it can be money actually deposited into an account and earmarked for replacements.

**Total Roll Up Budget:** Total cost of proposed energy retrofit activities in ALL of your buildings.

**Total Roll Up Program Funding:** Total amount of funding requested from the Program for proposed energy retrofit activities in ALL of your buildings.

**Utility Rebates:** Funds that are provided by the local utilities as a rebate for installing energy efficient equipment.

## APPLICATION WALKTHROUGH

### APPLICATION SUBMISSION CHECKLIST

Use and check off the items in this checklist before submitting your completed Application Form.

### APPLICANT INFORMATION

Include all required information for your Organization, Signing Authority, Project Contact and Organization Mandate. If you have a BC Housing File Reference #, include it in this section (this is a building identifier used by BC Housing for societies who have an operating agreement).

### PROJECT FINANCIALS

This section is a **summary** of the individual building cost and funding information which must be completed in Appendix A.

The 'Total Roll Up Budget' is the total estimated cost of ALL energy retrofit activities for ALL buildings, including the amount requested from the Program. Each individual building must be listed separately and a separate Appendix A form completed for each. If you are requesting funding for one building only, the estimated energy retrofit activities cost for that building in Appendix A must equal the 'Total Roll Up Budget' amount.

The 'Total Roll Up Program Funding' is the total amount of funding being requested from the Program for ALL of your buildings. Each individual building must be listed separately in Appendix A. If you are requesting Program funding for one building only, the estimated Program Funding for that building in Appendix A must equal the 'Total Program Funding' amount.

### TARGET POPULATION AND COMMUNITY SUPPORT

Complete this section to indicate how Program funding will impact your community.

### ADDITIONAL INFORMATION

Use this section to include any other information you think relevant or wish to highlight.

### SUPPORTING DOCUMENTS

If you are submitting supporting documents for your project, please list them here and send them with your application.

### HOW DID YOU HEAR ABOUT THIS PROGRAM?

This section contains information that is very helpful in assessing the impact of the communication model for the Energy Retrofit Program and other Trust programs. Please select all that apply.

## DECLARATION

The authorized signatory indicated in the APPLICANT INFORMATION section must sign and date the declaration.

## Appendix A

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This section must be completed for **each building** for which energy retrofit funding is requested. Appendix A should be copied and identified for each building as in the following example:

- Appendix A (Building Address)
- Appendix A (Building Address)
- Appendix A (Building Address)

If you are planning the same type of retrofit in each building (e.g. Lighting), a separate Appendix A must still be completed for each building.

## PER BUILDING PROJECT DETAILS and PER BUILDING PROJECT PLAN

These sections can include more than one retrofit activity, e.g. exit lighting AND Air-sealing, if such retrofits are contained within one building.

### PER BUILDING PROJECT PLAN

In the 'Who Will Oversee the Activity' section in the Activity table, include the contact name of the person employed within your organization who will actively manage the energy retrofit activity in the building, including retaining and coordinating contractors, consultants and managing contractor payments.

### PER BUILDING PROJECT BUDGET AND FUNDING SOURCES

List the project's estimated budget and ALL estimated funding sources that apply to the specific building associated with the specific Appendix A. The estimated budget and total funding must match.

CALCULATION EXAMPLE: Applicant with two buildings

**Total Roll Up Budget**

\$105,000 [\$85,000+\$20,000]

**Total Roll Up Program Funding**

\$45,000 [\$25,000+\$20,000]

# of buildings included in total above: 2

**Appendix A (100 Main Street)**

**Estimated Budget\* (\$)**

\$85,000

**Describe how you arrived at this estimate.**

*Amount listed in building condition assessment.*

**Estimated other Funding sources** (check all that apply)

- |   |          |
|---|----------|
| <input type="checkbox"/> Maintenance Budget   | \$2,000  |
| <input type="checkbox"/> Operating Budget     | \$3,000  |
| <input type="checkbox"/> Replacement Reserve  | \$50,000 |
| <input type="checkbox"/> Utility Rebates      | \$5,000  |
| <input type="checkbox"/> Government           | \$0      |
| <input type="checkbox"/> Donation/Fundraising | \$0      |
| <input type="checkbox"/> Other _____          | \$0      |

**Estimated Program Funding**

- |   |          |
|---|----------|
| <input type="checkbox"/> Columbia Basin Trust | \$25,000 |
|---|----------|

Total Funding\* \$85,000

**Appendix A (200 Main Street)**

**Estimated Budget\* (\$)**

\$20,000

**Describe how you arrived at this estimate.**

*Quote received last year*

**Estimated other Funding sources** (check all that apply)

- |   |     |
|---|-----|
| <input type="checkbox"/> Maintenance Budget   | \$0 |
| <input type="checkbox"/> Operating Budget     | \$0 |
| <input type="checkbox"/> Replacement Reserve  | \$0 |
| <input type="checkbox"/> Utility Rebates      | \$0 |
| <input type="checkbox"/> Government           | \$0 |
| <input type="checkbox"/> Donation/Fundraising | \$0 |
| <input type="checkbox"/> Other _____          | \$0 |

**Estimated Program Funding**

- |   |          |
|---|----------|
| <input type="checkbox"/> Columbia Basin Trust | \$20,000 |
|---|----------|

Total Funding\* \$20,000

\* Estimated Budget and Total Funding should be equal.



You may be eligible for other energy incentive programs which would qualify as a funding source through the energy programs managed by BCNPHA. Contact [BasinERP@bcnpha.ca](mailto:BasinERP@bcnpha.ca) for further information.

**IMPORTANT:**

If you have any questions regarding completing this application, especially those that may impact on your submission date of June 30, 2017, please contact the below as soon as possible:

Mike Gamble, BCNPHA Asset Management Coordinator  
Toll Free: 1-800-494-8859 ext. 2150  
Direct: 236-521-0616  
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