

2018 PROGRAM GUIDE

This 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 had one intake in June 2017 and this second intake will accept Expressions of Interest until February 7, 2018. Shortlisted non-profits will be contacted by BCNPHA for more information such as project scope details, quotes, or other information if required, prior to final selection and approval of funding.

WHO CAN APPLY?

Registered non-profit organizations who are operating housing in the Columbia Basin Trust region ([view map here](#)) and are in good standing with the BC Registry Services 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.

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 and/or 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;
- 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; or
- 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.
- 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 Guide thoroughly.
- STEP 2:** Download the Expression of Interest Form at ourtrust.org/energyretrofit or bcnpha.ca/programs_and_service/CBT-ERP
- STEP 3:** Complete the Form.
- STEP 4:** Submit your Expression of Interest Form by **February 7, 2018 @ 13:00 PT** by email to BasinERP@bcnpha.ca with the Subject line: "Basin ERP Intake 2 (*insert organization name*)".

A confirmation email will be sent to you. **Late submissions will not be accepted.**

IMPORTANT:

If you have any questions regarding completing this expression of interest, especially those that may impact your submission contact us:

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

WHAT ELSE DO I HAVE TO KEEP IN MIND?

- Preference will be given to projects that have a high return on investment (ROI).
- Societies 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 to ensure you access the best rate for your organization.
- Societies must apply for all available utility and government energy grants and rebates relating to the Project.
- Societies must have the commitment and capacity to undertake energy retrofit activities.
- Ensure that you contact 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.

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

EXPRESSION OF INTEREST FORM QUESTIONS

APPLICANT INFORMATION

Include all requested information where applicable. A BC Housing File Reference number is a building identifier used by BC Housing for societies who have an operating agreement.

TARGET POPULATION AND COMMUNITY SUPPORT

Complete this section to indicate how the retrofit will impact your community.

ADDITIONAL INFORMATION

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

HOW DID YOU HEAR ABOUT THIS PROGRAM?

This information is helpful in assessing the impact of the communication model for the Energy Retrofit Program and other Trust programs.

DECLARATION

The authorized signatory must sign and date the declaration.

Appendix A

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. 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 SUMMARY AND DETAILS

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.

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 for further information.

ENERGY RETROFIT PROGRAM FLOW

