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Community Buildings Retrofit

**APPLICATION
GUIDE**



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INTRODUCTION

FCM's Community Buildings Retrofit (CBR) initiative helps to optimize the energy performance and reduce greenhouse gas (GHG) emissions of community buildings owned by municipalities and not-for-profit organizations. The CBR initiative is administered through FCM's Green Municipal Fund (GMF).

By retrofitting these buildings, municipalities and their partners can achieve significant environmental, economic and social benefits for their communities, including:

- reduced GHG emissions
- lower operating costs and new local jobs
- better building quality and greater community use

FCM's Community Buildings Retrofit initiative is a \$167 million initiative that was made possible through a federal government contribution of \$950 million

in its 2019 budget. Applicants can stack CBR funding with other funding programs, including those available through provincial and territorial governments.

How to use this guide

This guide outlines everything you need to know about applying for CBR funding. It contains thorough instructions for how to apply, including tips for completing a great application.

More information on the CBR initiative is available at [on our website](#).

For any questions about how to apply, please [contact us](#) or call 1-877-417-0550.

About the Community Buildings Retrofit initiative

Buildings that serve a community purpose are cornerstones of strong, vibrant communities. Community buildings also tend to consume the most energy and have the highest levels of GHG emissions and operating costs of all buildings owned by municipalities and not-for-profit organizations.

FCM's Community Buildings Retrofit initiative helps municipalities and their partners retrofit community buildings while managing their capital expenditures and minimizing ongoing operating and maintenance costs. Through this initiative, FCM aims to help municipalities and their partners reduce GHG emissions from community buildings by at least 50 percent within 10 years and by at least 80 percent (i.e., near net-zero GHG emissions) within 20 years. CBR also provides support for standalone retrofits that achieve GHG reductions of at least 30 percent in the near-term.

GHG retrofits for community buildings

GHG retrofits — such as replacing windows and doors, improving insulation during wall or roof maintenance or replacing HVAC systems — are usually done at the same time as major capital upgrades to an existing facility. These retrofits can reduce operating costs and extend the useful life of these buildings, as well as tackle climate change. But planning a retrofit that significantly reduces GHG emissions can be complex and expensive. CBR funding can help you overcome these barriers and implement a high-impact retrofit.

Timing your retrofit with maintenance and equipment renewal cycles can also help you manage capital costs while maximizing savings. With CBR funding, you can plan and implement your retrofit in phases that will significantly reduce GHGs and costs over the remaining useful life of the retrofitted buildings.

GMF Municipal Energy Roadmap

Want to learn more about the best ways to significantly reduce the energy use and GHG emissions of community buildings? [See our GMF Municipal Energy Roadmap.](#)



AVAILABLE FUNDING

Whether you have a community building needing immediate repair, a major equipment replacement coming up or you've recently retrofitted a building and are thinking about your next steps, we can

help you find the right starting point to help you achieve your environmental, economic and social goals.

The following funding is available through CBR.

Table 1: Available funding

| Funding | Details |
|---|---|
| Community building monitoring and analysis grant | <ul style="list-style-type: none"> • Grant for up to 80% of eligible costs • Up to \$25,000 • Only one project of this type is eligible for funding within an individual municipality regardless of whether the included building or buildings are owned by the municipality or a not-for-profit organization. |
| Community building recommissioning grant | <ul style="list-style-type: none"> • Grant for up to 60% of eligible costs • Up to \$55,000 • Only one project of this type is eligible for funding within an individual municipality regardless of whether the included building or buildings are owned by the municipality or a not-for-profit organization. |

| Funding | Details |
|--|---|
| GHG reduction pathway feasibility studies | <ul style="list-style-type: none"> • Grant for up to 80% of eligible costs • Up to \$65,000 for a single building • Up to \$200,000 per portfolio of buildings (the average per building must not exceed \$65,000) • Only one feasibility study of this type is eligible for funding within an individual municipality regardless of whether the included building or buildings are owned by the municipality or a not-for-profit organization. |
| GHG impact retrofit capital projects | <ul style="list-style-type: none"> • Combined grant and loan for up to 80% of eligible costs • Maximum of \$5 million per project. Up to 25% as a grant and the remainder as a loan • See the note below on the number of capital projects eligible for CBR funding. |
| GHG reduction pathway retrofit capital projects | <ul style="list-style-type: none"> • Combined grant and loan for up to 80% of eligible costs • Maximum of \$5 million per project. Up to 25% as a grant and the remainder as a loan • See the note below on the number of capital projects eligible for CBR funding. |

Note: Applicants may receive funding for only **one** of the following types of capital projects within an individual municipality regardless of whether the included building or buildings are owned by the municipality or a not-for-profit organization. In other words, you may apply for funding for a GHG impact retrofit capital project or a GHG reduction pathway retrofit capital project, but not both.

- **GHG impact retrofit capital project:** If you apply for funding for this type of capital project, only one project is eligible for funding.
- **GHG reduction pathway retrofit capital project:** If you apply for funding for this type of capital project, there are no limits on the number of projects eligible for funding, provided all projects are part of the same GHG reduction pathway (in the Eligibility section, see GHG Reduction Pathway Feasibility Studies).

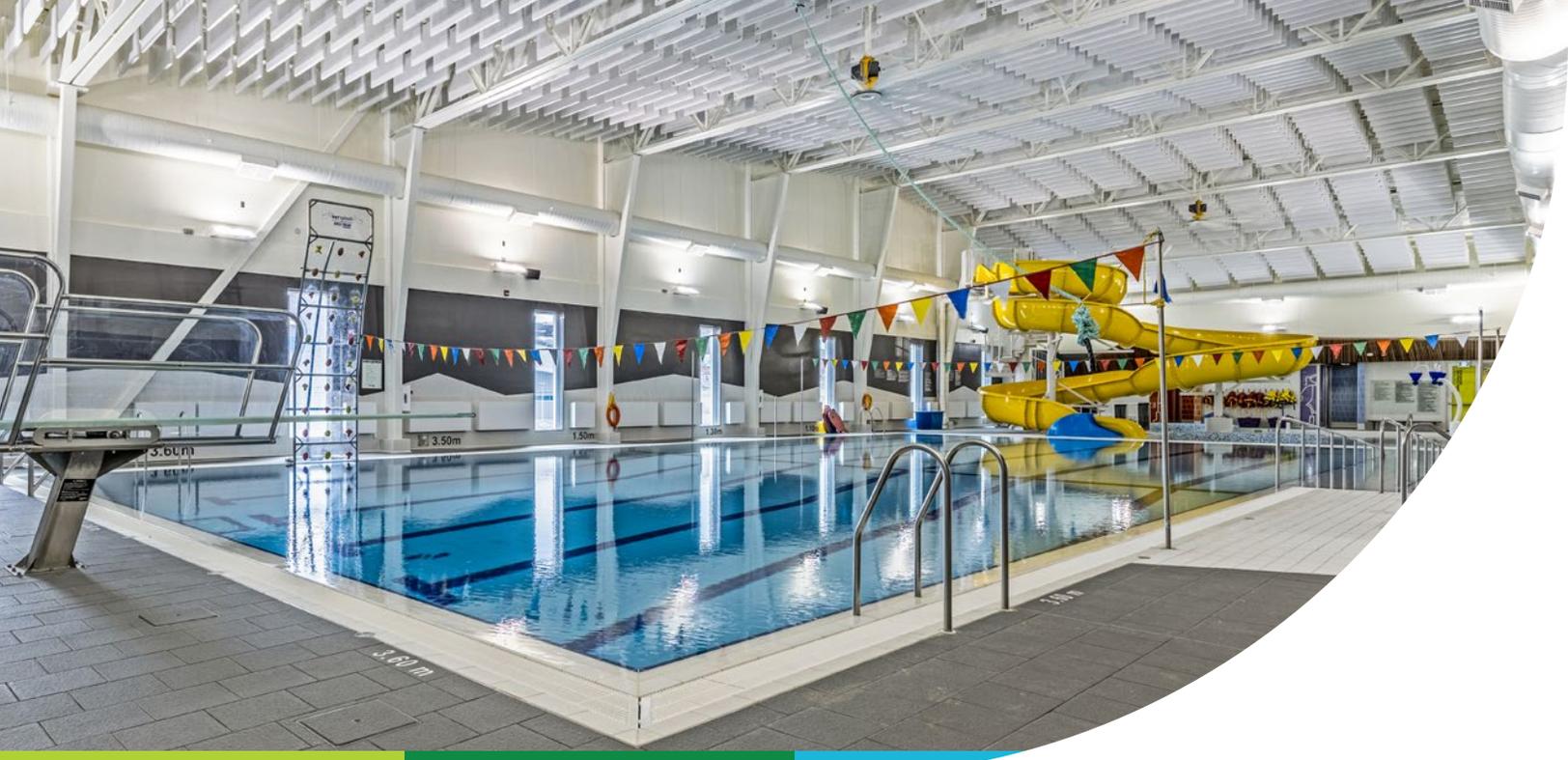
Capital projects – budgets and financing

FCM funds capital projects through a combination of loans and grants administered through our Green Municipal Fund. We aim to provide loans at competitive market rates in combination with substantial grants to buy down your project's non-recurring costs, reduce your debt burden and make GHG reduction measures with higher capital costs accessible. This funding is designed to ensure that you don't incur additional long-term costs associated with operations or debt servicing.

The total funding and grant amounts are calculated as a proportion of the total eligible project budget, not just the GHG reduction measures. This means that your overall capital construction costs, including project management costs, should be included as part of your project scope and budget.

Small and rural municipalities

FCM is committed to supporting small and rural municipalities in their efforts to reduce their energy consumption and resulting GHG emissions, and we encourage you to apply through one or more of our CBR funding streams. However, we understand that participating in a funding program can be challenging for municipalities with few staff members or other resources. We plan to build on the lessons learned over the first year of the CBR initiative so that we can provide more support for small and rural municipalities interested in CBR funding.



CAPACITY BUILDING

In addition to funding, we also provide access to relevant resources, training and expertise to help you plan, implement and monitor the results of your community building retrofit projects. These include:

- A curated online library of relevant resources, courses and training opportunities to help you build your business case and retrofit your community buildings.
- A list of complementary funding programs that can be stacked with CBR funding.
- Access to regional or national partners that can provide technical and administrative support to help you plan and implement your community building retrofits.

FCM will share the results and lessons learned through the CBR initiative with municipalities and their partners across the country through various networks. As a CBR funding recipient, you may be invited to share your experiences with other communities through online meetings, case studies or other activities.

For information on our latest resources and activities, [visit our website](#) and [sign up for our e-newsletter](#).



ELIGIBILITY

Eligible applicants

CBR funding is available to:

- **Canadian municipal governments**, with the exception of the Low Carbon Cities Canada (LC3) namesake municipalities: the cities of Vancouver, Edmonton, Calgary, Toronto, Ottawa and Montreal, and the Halifax Regional Municipality
- **Quebec municipalities** are currently ineligible as discussions between FCM and the government of Quebec are still underway. See Municipal applicants from Quebec section
- **Municipal partners**, which could include:
 - private-sector entities
 - Indigenous communities
 - municipally owned corporations
 - regional, provincial or territorial organizations delivering municipal services

- non-governmental organizations
- not-for-profit organizations
- research institutes (e.g., universities)

Eligible buildings

CBR funding is available for projects that focus on community buildings. A community building is an enclosed public place or an enclosed workplace that is:

- Owned by a municipal government or not-for-profit organization.
- Primarily used to provide athletic, recreational, cultural and community programs or services to the local community.
- Widely accessible to everyone, offering services that enhance the health and well-being, skills development, and economic development of individuals and communities.

Community buildings include:

- Athletic facilities, such as indoor rinks, sports arenas, swimming pools and gyms.
- Recreational facilities, including recreation centres and clubhouses.
- Cultural facilities, including performing arts centres, art galleries, auditoriums and libraries.
- Community buildings, including community centres, seniors' centres and clubs, and halls.

Projects focused on multi-purpose buildings that house one or more of the above community services alongside other services or administrative functions are eligible for CBR funding. Projects including other standalone municipal buildings — such as city hall and administrative buildings, fire halls, emergency medical services facilities and public works buildings — are also eligible for funding if the standalone building is part of a portfolio of buildings that includes community buildings.

Eligible projects

The following types of projects are eligible for CBR funding.

Community building monitoring and analysis projects

Grants for community building monitoring and analysis projects are targeted to owners of community buildings that do not have a building monitoring and analysis system in place. In general, a building monitoring and analysis system enables you to:

- Monitor the energy performance of your buildings, allowing for weather normalization and year-over-year comparisons.
- Benchmark the energy performance of your buildings against similar buildings in other municipalities.
- Identify and implement simple energy conservation measures.
- Track, monitor and report energy performance after energy conservation measures are implemented.
- Translate energy savings to GHG reductions.

We expect most projects will include a portfolio of buildings to support the business case for ongoing monitoring and analysis costs.

For more detailed eligibility criteria for this grant, see the [Community Building Monitoring and Analysis Grant Application Form](#).

Community building recommissioning projects

Grants for community building recommissioning projects help you to optimize the performance of your community buildings. This funding supports you in reducing your whole-building energy use by at least 5 to 15 percent, finding ways to extend the life of your equipment and reduce maintenance costs, and developing strategies and implementing actions to ensure your building systems and equipment are operating optimally at all times.

Two types of projects are eligible for this funding:

- **Building recommissioning projects:** Building recommissioning is a process to re-optimize existing buildings. It's used to improve how building equipment and systems are operating to meet building-use requirements and expectations. Using this process, building owners identify problems and integration issues as well as low- or no-cost operational improvements to improve comfort for building users and save energy. Building recommissioning can be done alone or with a retrofit.
- **Retro-commissioning projects:** Retro commissioning is like recommissioning, but it applies to an existing building that was not originally commissioned. Additional investigation is usually needed due to a lack of prior commissioning data.

Recommissioning and retro-commissioning projects usually include four phases: planning, investigation, implementation and hand-off. Over the course of these phases, building owners define the scope of work, find and prioritize opportunities for improvement, implement these improvements and develop a strategy to maintain the building performance over time.

We expect most projects will focus on a single building, but projects that include multiple buildings are also eligible.

For more detailed eligibility criteria for this grant, see the [Community Building Recommissioning Grant Application Form](#).

GHG reduction pathway feasibility studies

Grants for GHG reduction pathway feasibility studies help you to integrate energy and GHG reductions into your longer-term plans for managing community buildings. This funding supports you in conducting feasibility studies for short- and long-term capital projects while mapping out a course to extend the life of these buildings and reduce operating and maintenance costs over your buildings' remaining useful life.

These studies will enable you to identify a sequence of GHG reduction measures — the “GHG reduction pathway” — that will help you to reduce GHG emissions for community buildings by at least 50 percent within 10 years and by at least 80 percent (i.e., near net-zero GHG emissions) within 20 years. Studies will consider your unique objectives and constraints (e.g., building use, capital budgets, equipment renewal cycles, etc.) and explore multiple optimization scenarios.

Sample GHG reduction pathway

Figure 1 provides an example of what a GHG reduction pathway could look like.

In this example, capital projects are conducted in phases toward achieving near net-zero GHG emissions. The projects are supported by an ongoing strategy to ensure existing equipment and systems operate optimally. In Phase 1, the owner of an aging community building improves the building envelope in various ways

(e.g., adding insulation, energy-efficient windows, etc.) while addressing critical building maintenance issues. In Phase 2, the building owner implements GHG reduction measures with high rates of return. Four years later, the owner replaces the HVAC system at its end of life. Three years after that, the owner adds solar photovoltaic panels to the roof, concluding Phase 4.

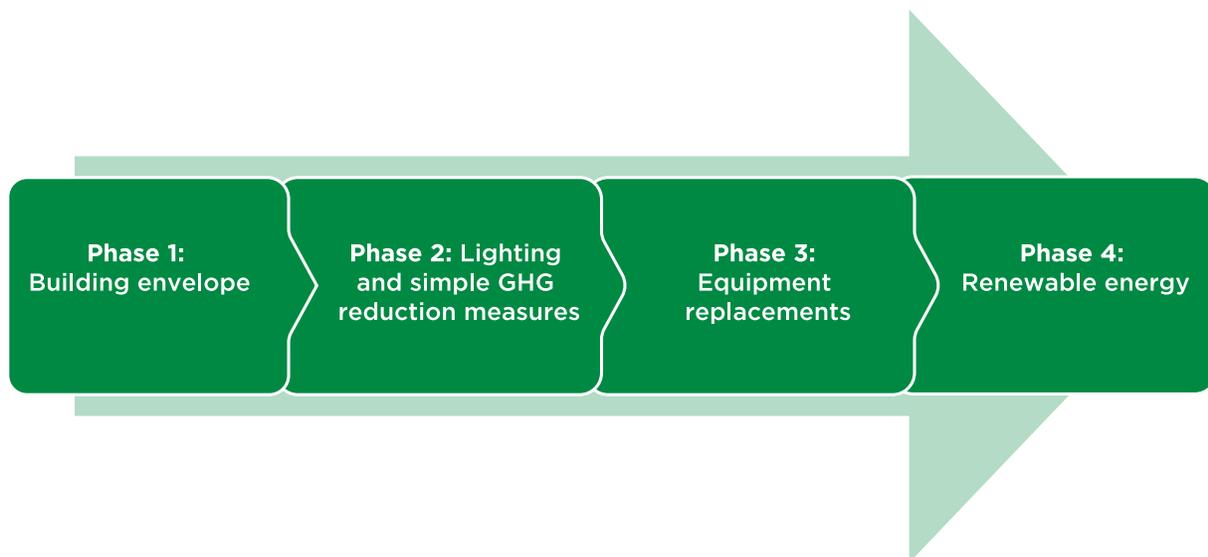


Figure 1: Sample GHG reduction pathway for a community building

This is just one example of a GHG reduction pathway; your own pathway will reflect your unique objectives, constraints and preferred measures. Some GHG reduction pathways may include multiple phases, whereas others may include a single, more extensive retrofit.

Projects may include more than one building provided at least one of the buildings is a community building. Projects that include multiple buildings may include a portfolio of buildings within a single municipality or a group of similar buildings in multiple municipalities (e.g., indoor swimming pools located in three municipalities).

GHG impact retrofit capital projects

Funding for GHG impact retrofit capital projects supports you in undertaking community building retrofits that reduce GHG emissions by at least 30 percent compared to baseline emissions.

Eligible projects include comprehensive retrofits of single community buildings and retrofits of a portfolio of buildings.

Retrofits of a portfolio of buildings are eligible for funding provided the portfolio meets at least **one** of the following criteria:

- The portfolio includes more than one community building within the same municipality.
- The portfolio includes at least one community building and other municipal buildings within the same municipality.
- The portfolio includes similar community buildings within multiple municipalities (subject to GMF review).

GHG reduction pathway retrofit capital projects

Funding for GHG reduction pathway retrofit capital projects supports you in implementing one or more phases of a GHG reduction pathway as defined in a GHG reduction pathway feasibility study or equivalent. Eligible projects

may focus on a pathway for a single building or a portfolio of buildings.

GHG reduction pathway retrofits for a portfolio of buildings are eligible for funding provided the portfolio meets at least **one** of the following criteria:

- The portfolio includes more than one community building within the same municipality.
- The portfolio includes at least one community building and other municipal buildings within the same municipality.
- The portfolio includes similar community buildings within multiple municipalities (subject to GMF review).

Your funding application must include at least one retrofit phase identified in the pathway or a combination of GHG reduction measures identified in the pathway that are appropriately sequenced to achieve near net-zero GHG emissions within 20 years. If your funding application is approved, you can apply for funding support for subsequent phases in the future, subject to funding availability.

GHG reduction criteria

Eligible projects must meet the following GHG reduction requirements.

Table 2: GHG reduction criteria by type of project

| Project | GHG reduction criteria |
|---|------------------------|
| Community building monitoring and analysis projects | N/A |

| Project | GHG reduction criteria |
|---|---|
| Community building recommissioning projects | N/A |
| GHG reduction pathway feasibility studies | <p>The feasibility study must aim to reduce GHG emissions by at least 50 percent compared to the current or baseline performance of the building within 10 years and by at least 80 percent compared to the current or baseline performance of the building (i.e., near net-zero GHG emissions) within 20 years.</p> <p>Studies may focus on a single building or a portfolio of buildings. If the study focuses on a portfolio of buildings, it must aim to meet the reduction targets stated above for each building.</p> |
| GHG impact retrofit capital projects | <p>The capital project must aim to reduce GHG emissions by at least 30 percent compared to the current or baseline performance of the building. Baseline performance may be estimated where the retrofit changes the size or function of the building. GMF staff will validate the project baseline calculations provided in the feasibility study.</p> <p>Eligible projects may focus on a single building or a portfolio of buildings. If the project focuses on a portfolio of buildings, each building must meet the 30 percent reduction target.</p> <p>Up to one-third of the total GHG reductions achieved compared to the building's current or baseline performance can come from renewable energy generated onsite.</p> |
| GHG reduction pathway capital projects | <p>The capital project must be supported by a GHG reduction pathway feasibility study or an equivalent feasibility study.</p> <p>The capital project must include at least one retrofit phase identified in the GHG reduction pathway or a combination of GHG reduction measures sequenced in alignment with the GHG reduction pathway. The capital project must support the timelines included within the GHG reduction pathway.</p> |



EVALUATION OF APPLICATIONS

We will evaluate your funding application using the following three criteria:

- **Impact:** The project has the potential to generate measurable environmental benefits, including GHG emissions reductions, as well as other improvements or sustainable practices; decrease energy costs; and support community benefits.
- **Implementation:** The project is designed holistically with a strong project management approach that includes planning, risk management, stakeholder engagement and appropriate resourcing.

- **Transformative potential:** The project exemplifies transformative potential by demonstrating or adopting new and better solutions, with a high likelihood of encouraging replication.

The following table outlines the elements of these criteria.

Table 3: Evaluation criteria

| Impact | Implementation | Transformative potential |
|--|--|--|
| <ul style="list-style-type: none"> • Quantitative environmental benefits • Qualitative environmental benefits • Financial benefits • Community benefits • Relative impact | <ul style="list-style-type: none"> • Stakeholder engagement • Team and partners • Workplan and budget • Risk management • Financing • Measurement and monitoring | <ul style="list-style-type: none"> • Capacity building • Replication potential • Innovation • Audacity |



APPLICATION PROCESS

If you're applying for funding for a feasibility study or a capital project, you will need to submit a pre-application form to confirm your eligibility (steps 1 and 2). If you're applying for funding for a community building monitoring and analysis project or a community building recommissioning project, you don't need to submit a pre-application form.

All applicants must submit a complete Word application form, an Excel project workbook and required supporting documentation. A GMF project officer will be your point of contact through the process and will review your file and provide feedback. They may invite you

to revisit some steps to help you submit a complete and high-quality application.

When to apply

Applications are accepted year-round until all annual funds are allocated. New applications are then deferred to April 1 of the following fiscal year. If this happens, we will let you know. This process is generally the same for all types of applications.

Funding and review process



Step 1: Pre-application submission

If you're applying for funding for a feasibility study or a capital project, you will need to fill out a simple online pre-application form. This step gives us an overview of your organization and project.

Step 2: Eligibility determination

If you're applying for funding for a feasibility study or a capital project, a GMF project officer will review your pre-application form to determine whether your organization and project are eligible for funding before you submit a full application. You will receive a response within 15 business days of the date we receive your pre-application form.

Step 3: Full application

If you're applying for funding for a feasibility study or a capital project and we have confirmed your eligibility, your assigned GMF project officer will send you a full application form, pre-populated with answers from your pre-application form, as well as an Excel project workbook. The project workbook contains tabs that summarize important details of your project.

The full application forms for community building monitoring and analysis projects and community building re-commissioning projects are available on our website.

Step 4: Verification and submission

As you complete the application form, don't hesitate to reach out to your assigned GMF project officer with any questions you might have. Once you've verified the information on your form, submit it to the GMF inbox on the [Box.com](#) website.

Step 5: GMF project officer review

A GMF project officer will review your application for accuracy and completeness and will work with you to resolve any remaining questions.

Step 6: Peer review and internal review

An external expert peer review panel evaluates all funding applications. An internal analysis is also completed to provide a funding recommendation to GMF's managing director, the GMF Council and FCM's Board of Directors.

Step 7: FCM funding decision

For capital projects, FCM's Board of Directors approves the funding recommendation made by the GMF Council.

For all other types of projects, funding decisions are made directly by the GMF managing director.

If you're applying for funding for a project other than a capital project, you will receive a funding decision within about three to four months from the date you submitted your full application.

If you're applying for funding for a capital project, you will receive a funding decision within about four to six months.

Application forms

You'll be required to submit the following forms to apply for CBR funding:

| | |
|---|---|
| Community building monitoring and analysis projects | <ul style="list-style-type: none">• Full application form• Project workbook |
| Community building recommissioning projects | <ul style="list-style-type: none">• Full application form• Project workbook |
| GHG reduction pathway feasibility studies GHG impact retrofit capital projects GHG reduction pathway retrofit capital projects | <ul style="list-style-type: none">• Pre-application form• Full application form: We will send you this form directly if your organization and project are determined to be eligible for funding.• Project workbook: We will send you this form directly if your organization and project are determined to be eligible for funding. |

Required supporting documents

In various places on the application form, we ask you to attach supporting documents. These documents provide important information about your organization and the details of your project. Items included in the supporting document list are mandatory. You are welcome to provide further evidence as needed and available.

The supporting documents you're asked to provide are determined based on whether your organization is a municipal government or a partner of a municipal government. The following table outlines these requirements, as well as the requirements and conditions that your organization must fulfill before you submit your application. Please note that additional documentation may be requested.

Table 4: Required supporting documents by type of application

| Application | Required supporting documents |
|------------------|--|
| All applications | <ul style="list-style-type: none"> • Completed application form • Project workbook • Letters from confirmed sources of funding • Letter of confirmation of consultation with your provincial or territorial government • Project team organizational chart and resumé • Evidence of municipal support (i.e., council resolution or letter of support). The resolution or letter of support should acknowledge eligibility limitations for feasibility studies and capital projects as specified in the Eligibility section. <p>**Consultation with the provincial or territorial government is a requirement of FCM's funding agreement with the federal government.</p> |

| Application | Required supporting documents |
|---|--|
| <p>Additional information required for all capital projects</p> | <ul style="list-style-type: none"> • Completed feasibility study • Recent building condition assessment • Energy model or relevant calculations • Engineering cost estimate • Your organization's audited financial statements for the past three years or, if a guarantor is providing a financial guarantee, the audited financial statements of the guarantor • Executive summary of the environmental assessment of your project, if required under federal, provincial or territorial laws • New Brunswick municipalities (other than the City of Saint John): Evidence that you have obtained the New Brunswick Municipal Capital Borrowing Board's authorization to borrow funds • Nova Scotia municipalities: Evidence that you have obtained authorization from the Minister of Service Nova Scotia and Municipal Relations to borrow funds |
| <p>Additional information required for capital projects undertaken by municipal partner applicants</p> | <ul style="list-style-type: none"> • Project financial model (i.e., pro forma) • Confirmation of equity contribution (if applicable) • Confirmation of any ongoing subsidies (if applicable) • Recent property appraisal and needs assessment (if conducted) • Copy of fixed priced contract entered into with contractor references (if obtained) • Constating documents (founding articles of incorporation of the lead applicant, to ensure eligibility) |



APPLICATION INSTRUCTIONS: FEASIBILITY STUDIES AND CAPITAL PROJECTS

Follow the directions below as you complete your [pre-application form](#) and full application for a feasibility study or capital project. Answer each question with enough detail so that someone who has never heard of your project or community would fully understand your application.

All our funding application forms include the following three sections:

- Part A: Applicant information
- Part B: Information about your project
 - **Note:** In the pre-application form, you only need to complete sections B1 and B2. The full application form also includes the project workbook.
- Part C: Declaration and signature

Part A: Applicant information

Tell us who you are, where you're from, and a bit about your organization.

A1. Applicant organization type and contact information

The “lead applicant” is the organization that signs the contract with FCM, oversees the project (even if a third party completes the work), incurs the costs of the project and submits the required reports to FCM. Please provide the contact information for the individual authorized to act on behalf of the lead applicant.

A2. Organization information (for non-municipal applicants only)

Tell us about your organization. How long you have been operating, and how are you involved in community buildings? If your organization is a not-for-profit, provide a brief history of your organization and indicate whether you own a single community building or a portfolio of community buildings.

A3. Municipal support (for non-municipal applicants only)

If your organization is not a municipal government, your project must be supported by one. Provide the name and contact information for the main contact at your local municipality as well as a support letter from the municipality. We will provide you [with a template for this support letter](#). (Note: Municipal corporations must complete this step.)

Your support letter should state the municipality's support of the project and acknowledge its understanding that if the project receives CBR funding, no further projects of the same type located within the municipality will be eligible for CBR funding (with the exception of GHG reduction pathway capital projects – see the Available Funding section, Table 1: Available Funding by Type of Project section). The letter must be signed by the mayor on behalf of council, or by the municipality's chief administrative officer or city manager.

Optional: The letter should specify any way in which the municipality has demonstrated its support, if applicable (e.g., in-kind contribution, financial contribution, etc.)

Part B: Information about your project

Tell us about your project, the anticipated benefits, why this project is important, and how you intend to implement it. This section includes completion of the project workbook.

Tip: Please be as concise, specific and quantitative (i.e., measurable) as possible when you answer the questions in the pre-application form and full application form. You can answer each question or refer us to specific sections or pages in attached documents.

B1. Overview

Pre-application and full application form:

B1a. Details of your project

| | |
|---|---|
| Working title | The title should: <ul style="list-style-type: none">• Describe what the project is.• Mention the name of the city or community. |
| Type of project | Are you requesting funding for a: <ul style="list-style-type: none">• GHG reduction pathway feasibility study• GHG impact retrofit capital project• GHG reduction pathway retrofit capital project Refer to the descriptions of each of the eligible projects (see the Eligibility section, Eligible Projects). |
| Building type (select all that apply) | Is the community building included in the project an arena, indoor pool, community centre, arts centre or other building type? Or multiple buildings? |
| Community building ownership | <ul style="list-style-type: none">• Municipality• Not-for-profit organization |
| Number of buildings included within the project | <ul style="list-style-type: none">• State the number of buildings included in your project. If your project includes more than one building, please specify the type of building for each building listed. |

B1b. Funding and timeline

| | |
|--|---|
| Start date of feasibility study or capital project | (dd-mm-yyyy) |
| End date of feasibility study or capital project | (dd-mm-yyyy) |
| Total feasibility study or capital project budget | Total |
| FCM funding request | What amount of funding are you requesting from FCM? Note: The amount must not be more than 80% of eligible costs. |

B1c. Executive summary

Pre-application and full application form:

Question: Provide a brief summary of your project.

Please summarize your project in a couple of paragraphs.

- Highlight key aspects of your project.
- Why is this project important for your community? What problem or problems are you trying to solve?
- What are the key benefits of your project? In particular, what are the environmental benefits?

In this field, please provide any other information that you feel will help us to understand your project and intended outcomes.

B2. Environmental benefits

This section asks you to describe the environmental measures you intend to implement and the environmental outcomes you expect to achieve. Projects will be assessed based on both the overall impact of your project and the probability of achieving the stated benefits. GHG emission reductions will be considered, along with other environmental benefits.

Environmental results and performance toward a more sustainable society is the primary mandate of FCM's Green Municipal Fund. As such, this is an important section that receives greater weight in funding decisions. Please refer to the required GHG reductions (see the Eligibility section, GHG Reduction Criteria) that you must meet to be eligible for funding.

Pre-application and full application form:

Question: Describe the GHG reduction and other environmental measures associated with this project, the expected GHG reduction and other environmental outcomes.

As you complete the application form, please consider the following:

GHG reductions

- **GHG reduction pathway feasibility studies:** Confirm your intent to reduce GHGs by at least 50 percent compared to the current or baseline performance of the building within 10 years and by at least 80 percent compared to the current or baseline performance of the building (i.e., near net-zero GHG emissions) within 20 years. If available, include recent relevant work that quantifies baseline energy consumption or GHG emissions and identifies potential GHG reduction opportunities as part of your supporting documentation (e.g., building monitoring reports, energy audits etc.).
- **GHG reduction impact retrofit capital projects:** Describe the measures you will use to reduce GHG emissions by 30 percent, as outlined in your feasibility study. Please ensure the expected GHG reduction can be compared to a baseline or assessment of the current state.
- **GHG reduction pathway retrofit capital projects:** Describe at a high level the project phases and timing that will be required to reduce GHGs by at least 50 percent compared to the current or baseline performance of the building within 10 years and by at least 80 percent compared to the current or baseline performance of the building (i.e., near net-zero

GHG emissions) within 20 years, as outlined in your feasibility study. Note the phase (or combination of GHG reduction measures) you're requesting funding for, and describe the GHG reduction measures you'll include in this phase as well as the expected GHG reduction. Please ensure the expected GHG reduction can be compared to a baseline or assessment of the current state.

Other environmental benefits

- Will your project result in other environmental benefits not represented or highlighted by the energy model? Examples include improving natural assets, using sustainably sourced materials, integrating climate change adaptation and resilience into design, reducing environmental nuisances such as light and noise, conserving water and reducing waste.
- Are these other environmental benefits quantifiable? If so, please provide estimates, ensuring that the reduction can be compared to a baseline or assessment of the current state (e.g., low-flow fixtures that will save water).

If you're applying for funding for a feasibility study, simply explain how the study may discuss other environmental benefits in the analysis.

Project workbook:

If you're applying for funding for a capital project, please review the environmental benefits tab in the project workbook. The worksheet will be pre-populated for you based on your submitted feasibility study.

B3. Economic and social benefits

This section asks you to describe the economic and social benefits of your project. A wide variety of benefits are acceptable. Economic benefits could include job creation, while social benefits could include improved services.

Project workbook:

If you're applying for funding for a capital project, please fill out the economic and social benefits tabs in the project workbook.

B3a. Economic benefits

Application form:

Question: Describe how economic benefits have factored into the design of your project.

Key considerations regarding economic benefits:

- How do your proposed solutions and mechanisms reduce costs, and how are they financially efficient and effective? Describe the return on investment you expect to achieve from the proposed GHG reduction measures (i.e., the financial health of the project).
- What operating cost savings do you anticipate will result from this project? What will be the benefit of these savings (e.g., operational savings will be invested in future capital projects, usage fees will be decreased, services will be expanded, etc.)?
- Do you anticipate achieving any other related benefits as a result of your project (e.g., extension of asset life, lower total cost of ownership, revenue generation, etc.)?

- As an optional consideration, consider how this project may impact local economic development.

If you're applying for funding for a feasibility study, simply explain the different economic factors that you will investigate in your study.

If you're applying for funding for a feasibility study, simply explain the different social factors that you will investigate in your study.

B3b. Social benefits

Application form:

Question: *Tell us about the social benefits you expect your project to generate.*

Recognizing that community buildings provide an important social benefit in themselves, focus on benefits that go above and beyond the social benefits the building currently provides. Where possible, provide any quantification related to these benefits. Some examples of social benefits to consider include:

- Supporting local communities in maximizing the benefits of these projects. Examples include supporting local work opportunities, skills training and fair wages for qualified local residents and groups who are traditionally underrepresented in the skilled trades sector, such as apprentices, Indigenous workers and women.
- Improving services provided to the community, including ensuring recent immigrants, racialized groups, seniors, parents and low-income Canadians have access to safe and affordable community spaces.
- Improving building quality, the building environment (e.g., light, smell, noise, heat) and the health and safety of users.

B4. Measuring and monitoring

This section asks you to describe your plan for measuring and monitoring the results of your project. These results yield valuable lessons that can help future applicants and improve the CBR initiative overall. Monitoring is also important for municipalities to ensure the expected benefits are realized. Monitoring and reporting are essential for FCM to report back to our funder, the federal government, on the impact of its investment.

Note: If your organization does not have a building monitoring and analysis system (see the Eligibility section, Eligible Projects, Building Monitoring and Analysis System Projects), we strongly recommend you apply for a grant to undertake a community building monitoring and analysis project. If you intend to apply for both a community building monitoring and analysis project and a capital project, please indicate in your response that you will do so. If you do this, you will also need to complete the application for the [community building monitoring and analysis project](#).

Application form:

Question: *Please describe how and when you will measure and monitor the impact and benefits of your project.*

We are looking for projects that have a robust measurement system to demonstrate expected benefits, particularly quantifiable environmental benefits. This question assesses how you will collect and analyze data, and how you will verify the performance of your project.

A strong measurement system will include a range of indicators, including those related to environmental or energy performance, the business case for your project and anticipated improvements to your level of service. Depending on the project, a measurement system could include a description of each parameter, how its value will be determined (e.g., direct measurement, modelling, estimation or other), any assumptions or additional technical factors pertinent to determining performance and how the information will be used or rolled up to determine the performance of the project.

If you're applying for funding for a feasibility study, describe how you plan to measure and validate performance for each of your proposed GHG reduction measures.

Note: Building commissioning is an eligible expense for capital projects. We strongly recommend that you include commissioning within your capital project and integrate your measurement and monitoring plan with the commissioning strategy. This integration will ensure your project and building operate optimally into the future.

B5. Replication

This section considers the use of best practices and proven solutions to implement a project successfully. It also considers whether the GHG reduction mechanisms you intend to implement encourage adoption and replication by your own organization and by others.

Application form:

Question: Describe whether and how your project uses best practices and proven solutions. Please also describe any

mechanisms you intend to implement to encourage adoption and replication.

A project is considered replicable when it includes:

- Models or best practices with demonstrated proven results in the design of the project.
- Clear performance benefits that address common problems across community buildings.
- Solutions for key challenges experienced by owners of community buildings.
- Clear market drivers for the adoption of a solution (e.g., cost savings over status quo, financial returns, regulation requirements and incentives).
- Commonly understood metrics and measures to show performance.
- Give specific examples of mechanisms you will use to encourage adoption and replication, such as:
 - A replication mechanism that is integral to the design of the solution (e.g., a packaged solution, toolkits, best practices, plan to replicate within a portfolio, etc.).
 - Partnership with one or more private sector, academic, government or non-governmental organizations with mandates for replicating solutions.
 - Involvement of city staff and elected officials to ensure your value proposition for this project can be translated to other municipal buildings.

B6. Capacity building and stakeholder engagement

- This section considers how a project is designed to increase the knowledge and capacity of municipalities and their partners to undertake GHG-related capital projects.

B6a. Capacity building

Application form:

Question: Please describe how you will build the knowledge, skills and capacity of your organization and key stakeholders to successfully undertake the proposed project, implement and maintain the results over time, and integrate the lessons learned into future projects.

Some considerations for capacity building could include:

- What knowledge or skills gap will this project address in your organization? How will you share or maintain this expertise internally and apply it to future projects?
- Will you work with local suppliers (e.g., trades, contractors, consultants, etc.) to build knowledge and skills for energy-related projects within your community?
- How do you plan to share the results of your project within your community and with other communities?
- Do you plan on creating educational activities or materials to share knowledge and lessons learned with other communities or networks?
- How will you ensure staff responsible for operating the building and energy systems have sufficient resources and training to maintain the performance target over time?

B6b. Stakeholder engagement

Application form:

Question: Please describe the stakeholder engagement plan for your project.

Identify all relevant stakeholders you have engaged or plan to engage to successfully plan, design and execute your

project (e.g., neighbours, neighbourhood or community associations, agencies or service providers, citizen groups, council or municipal staff). Describe the level, type of interaction and input you will seek from them.

In particular, please outline how you will engage with current and potential users of your community building and community stakeholders (e.g., recent immigrants, racialized groups, seniors, parents and low-income Canadians) to understand how you can improve the social value of your community building.

B7. Innovation

This section asks you to describe the innovation of your proposed project. CBR funding is intended to support entrepreneurial owners and operators of community buildings who undertake innovative and impactful solutions. We recognize, however, that innovation is a relative measure and can mean different things to different people and organizations. What is innovative for a small or rural community may not be so for a large one. When answering this question, consider how innovation relates to the specific context of your organization or community.

B7a. Innovative aspects of the project

Application form:

Question: Describe the innovative solution or solutions you will implement.

A project is considered to be innovative when it demonstrates at least one of the following:

- Development or application of new knowledge, policy, practice or advanced technology.

- A new or emerging application of an existing technology or practice.
- Adoption of knowledge or a practice that is new to a community or provider to suit the circumstances of that particular community or provider, or the adoption of advanced technology.
- In answering the question, also consider the following questions:
- How is each GHG reduction measure innovative? For example, does it develop or apply new, best practice knowledge, policies, practices, technologies or financial models that your organization hasn't used before? Or does it apply any of these in a new way, possibly to suit your unique circumstances?

B7b. Uncertainties around innovation (audacity)

Application form:

Question: *Describe why and how you expect this project will be difficult for your organization.*

We recognize that uncertainties and challenges are an inevitable part of any new and transformative solution, and we want to support projects that take on this worthy task.

Uncertainties and challenges are different from the risks associated with implementing your project. A project is considered to be taking on uncertainties and challenges when the applicant tries something they haven't previously or pushes further to achieve greater anticipated benefits, considering best practices, particularly from an environmental perspective.

When answering this question, speak generally about some of the uncertainties or challenges you might face in trying to achieve your target outcomes, and explain how you will tackle them.

B8. Project management and delivery

Project management is an essential component in our evaluation of any funding application. A project may be a great idea, but if there is no budget or financial ground to stand on, it's difficult to evaluate whether it will be implemented successfully.

Aside from the environmental section, this section of your application will require the most time and effort. Make sure to closely follow the instructions, and if you have any trouble, please reach out to your assigned GMF project officer for help.

This section is to be completed in the project workbook, which includes the following sections:

- **Financials:** Provide the budget and sources of funding for your project.
- **Milestones:** Include your project plan with descriptions and deliverables for up to five key milestones.
- **Team:** List up to five key team members, including their roles, qualifications and experience.
- **Implementation risks:** Describe the most significant risks you anticipate to implementation and how you will mitigate these risks.

You will find detailed instructions for completing this section in the project workbook.

Part C: Declaration and signature

Simply fill in the name and title of the person with signing authority from the lead applicant organization (see Part A) who will sign the application. Note that this person may differ from the primary contact of the lead applicant organization.

Once the application is complete, please verify that you have gathered all supporting documents listed in the Required Supporting Documents section. Follow the instructions below to submit your application and supporting documents.

How to submit your application

Organize your supporting documents

Before you submit your application, please check the list of required supporting documents for your project type in the Required Supporting Documents section. These documents validate the information you provide in your application. Make sure that your documents have filenames and titles that properly reflect their contents.

TIP: If possible, add the application section (e.g., B2, B6, etc.) that the document supports to each document's filename and title. This will help staff and peer reviewers find the appropriate files more quickly.

Ready to submit your application?

Before you submit your application:

- Make sure you answered all the questions in the application and project workbook.

- Double-check that you have included all of the required supporting documents you need.

Ensuring your submission is complete, including all supporting documents, will reduce the time it takes for us to process your application.

Now you're ready to upload your files! To do this:

1. Go to the GMF inbox [on the Box.com website](#).
2. Follow the on-screen instructions.

Municipal applicants from Quebec

FCM is currently in discussions with the government of Quebec to confirm an agreement that allows FCM to fund municipal infrastructure projects in Quebec through the Community Buildings Retrofit (CBR) initiative. Once an agreement is reached, FCM will invite Quebec municipal applicants to apply for CBR funding.

Municipally-owned corporations are not included in the agreement with the ministry. They must obtain authorization from the Quebec government to secure an agreement with FCM, in accordance with the Ministère du Conseil exécutif. Private non-profit organizations can submit their applications to FCM directly.

Need help or have suggestions to improve this guide?

If you're having trouble completing your application or uploading your files, or simply have some questions, please contact us at gminfo@fcm.ca or 1-877-417-0550.



APPENDIX: ELIGIBLE COSTS

This table outlines the costs that can be reimbursed by FCM. Please pay particular attention to any costs that may be ineligible for reimbursement.

Table 5: Eligible costs

Section A: Costs incurred before the date FCM receives your application

| Cost category | Eligible costs | Ineligible costs |
|-----------------|---|--|
| Pre-application | Consulting costs to write the application, including inserting information into the project workbook, incurred up to 90 days before the date FCM receives your application. | All other costs incurred before the date FCM receives your application, including any stakeholder engagement or research that took place to complete the full application or project workbook. |

Section B: Costs incurred after the date FCM receives your application

| Cost category | Eligible costs | Ineligible costs |
|--------------------------------------|--|---|
| Administrative | <p>Administrative costs that are directly linked to and have been incurred for the project, including:</p> <ul style="list-style-type: none"> • Communication costs (e.g., long-distance calls or faxes). • Permits or certifications required for the project. • Printing or photocopying by outside suppliers. • Acquisition of documents used exclusively for the project. • Document translation. | <ul style="list-style-type: none"> • General overhead costs, including operating costs related to the general maintenance, repair and overhead costs associated with the project. • Administrative costs not specifically listed as eligible costs. • Office space, supplies and general overhead costs incurred in the ordinary course of business. |
| Advertising | <p>Advertising costs essential to communicating the project to the public and evaluating the project, such as:</p> <ul style="list-style-type: none"> • Fees for advertising development. • Fees for media distribution. • Website development. • Public surveys. | <ul style="list-style-type: none"> • Advertising costs for general education or publicity associated with ongoing or other business activity and not a specific requirement of the project. • promotional items. |
| Audit (capital projects only) | <p>The cost of a financial audit conducted by a third-party accredited professional for the capital project, which is required by FCM.</p> | N/A |

| Cost category | Eligible costs | Ineligible costs |
|---|---|--|
| Capital expenditures (capital projects only) | <p>Capital costs as defined and determined in accordance with generally accepted accounting principles (GAAP), including:</p> <ul style="list-style-type: none"> • Costs for acquiring, developing, constructing, modernizing or leasing systems (equipment, hardware, software, etc.). • Costs of construction, renovation or modernization of facilities and structures, such as material and installation costs. | <ul style="list-style-type: none"> • Purchase or lease of real property. |
| Equipment rental (capital projects only) | <p>Rental of tools and equipment related to the capital project.</p> | <p>Rental of tools or equipment related to ongoing or other business activities</p> |
| Meetings and public gatherings | <p>Costs related to meetings and public gatherings that communicate the project to the public and that collect feedback, such as:</p> <ul style="list-style-type: none"> • Facility rental. • Audiovisual equipment rental. | <p>Any hospitality expenses, such as:</p> <ul style="list-style-type: none"> • food and drink • alcohol • door prizes • entertainment • music • decorations • flowers or centerpieces |

| Cost category | Eligible costs | Ineligible costs |
|---------------|--|--|
| Services | <p>Fees for professional or technical services, including:</p> <ul style="list-style-type: none"> • Consultant and contractor fees for work related to building monitoring and analysis, existing building commissioning (EBX), low-carbon pathway studies and capital projects. • Fees incurred by a third-party qualified commissioning agent or existing building commissioning agent for a comprehensive review of building systems. • Fees incurred by a certified professional to conduct project measurement and verification. • The cost of an environmental audit, which is required by FCM, undertaken by a third-party verification specialist (capital projects only). | <p>All: Costs for engineering studies, audit studies or studies for which grants or contributions are provided by or committed to be provided by any program of the Government of Canada.</p> |

| Cost category | Eligible costs | Ineligible costs |
|----------------------------------|--|--|
| <p>Staff remuneration</p> | <p>Daily rates actually paid by the eligible recipient to its employees (including permanent and contract employees) in Canada for time actually worked on the implementation of the project (including staff time to participate in capacity-building activities led by or on behalf of FCM). The daily rate per employee shall include the following costs:</p> <p>Direct salaries:</p> <ul style="list-style-type: none"> Actual and justifiable sums paid by the eligible recipient to employees in accordance with the eligible recipient's pay scales as regular salary, excluding overtime pay and bonuses. <p>Fringe Benefits:</p> <ul style="list-style-type: none"> Fringe benefit, in accordance with the eligible recipient's policies, as follows: <ul style="list-style-type: none"> Time-off benefits (prorated to the annual percentage of time actually worked on the implementation of the project): Allowable number of days to be paid by the eligible recipient for the payable absences of statutory holidays and annual vacation. | <ul style="list-style-type: none"> Overtime pay. Bonuses or performance pay. Fringe benefits, such as sick days, maternity leave, parental leave, pension plan and any other fringe benefits not listed as eligible. Costs related to ongoing or other regular business activities and not specifically required for the project. Staff wages while receiving training or attending learning events. Professional membership fees or dues. |

| Cost category | Eligible costs | Ineligible costs |
|---|--|---|
| Staff remuneration | <ul style="list-style-type: none"> • Paid benefits: Actual sums paid by the eligible recipient for paid benefits (prorated to the annual percentage of time actually worked on the implementation of the project); this includes the eligible recipient's contribution to employment insurance and workers' compensation plans (where applicable), health and medical insurance, group life insurance, or other mandatory government benefits. <p>Note: For private-sector entities only, as determined by FCM, the value of total staff remuneration cannot exceed 10% of eligible costs for the project.</p> | <ul style="list-style-type: none"> • Staff remuneration for which a grant or contribution is provided by or committed to be provided by FCM. This includes funding provided or committed through Climate Change Staff grants from FCM's Municipalities for Climate Innovation Program. |
| Supplies and materials | Supplies and materials that are specifically needed for the project. | Costs related to ongoing or other business activities that are not specifically required for the project. |
| Transportation, shipping and other courier charges | Transportation costs for delivery of materials and services essential for the project. | Any transportation expense related to ongoing or other business activities. |

| Cost category | Eligible costs | Ineligible costs |
|---------------------------------|--|---|
| Travel and accommodation | Travel and associated expenses for your staff and consultants to the extent that the travel and accommodation rates comply with Treasury Board of Canada guidelines and to the extent that such travel is necessary to complete the project, including travel and accommodation costs to attend CBR capacity-building activities organized by or on behalf of FCM. | <ul style="list-style-type: none"> Travel and associated expenses of a partner in the project. Travel, accommodation and fees to attend conferences, missions or trade shows. |
| Taxes | The portion of taxes for which your organization is not otherwise eligible for rebate. | The portion of provincial, territorial or federal taxes for which your organization is eligible for rebate. |
| In-kind contributions | N/A Note: Lead applicants can include costs for staff time for time actually worked on the implementation of the project and list this as “staff remuneration.” See the Staff Remuneration category above. | <ul style="list-style-type: none"> Any goods and services that are received through donation or in-kind contribution. |
| Other | Other costs considered by FCM’s Board of Directors or FCM staff to be necessary direct costs incurred properly and reasonably to implement your project. | N/A |