

## 2018 PROGRAM GUIDE

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This guide identifies what types of projects are eligible and gives you important information on how to complete an application form.

**Questions?** Contact us at 1.800.505.8998 or [energysustainability@cbt.org](mailto:energysustainability@cbt.org)

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## PROGRAM GUIDE

### WHAT IS THE ENERGY SUSTAINABILITY GRANTS PROGRAM?

Our Energy Sustainability Grants Program (Program) funds alternative energy generation and energy efficiency upgrades/retrofits to community purpose buildings. Projects must take place within the Columbia Basin Trust region (Basin) ([ourtrust.org/map](http://ourtrust.org/map)).

The Program will provide up to \$900,000 for the first year to support selected projects; a second intake will be announced in late 2019. The Trust will strive to distribute these funds equitably across communities, organizations and project types.

All project proposals must demonstrate alternative and renewable energy generation in order to be considered for funding and may also include activities related to energy conservation and efficiency.

Projects must demonstrate a positive return on investment (ROI) and significant community impact.

### WHO CAN APPLY?

- Eligible applicants include registered non-profits, local governments and Indigenous organizations in the Basin that own Community Purpose Buildings.
- For the purposes of this Program, Community Purpose Buildings are defined as buildings that:
  - can be accessed by the general public;
  - have a public benefit; and
  - are actively used.
- School districts and registered public colleges may be eligible where the project is specifically for a space used for broader public purposes by external organizations and the space is not being used by the school or college for providing education.

### WHEN IS THE APPLICATION DEADLINE?

**Monday, January 7<sup>th</sup>, 2019 at 2:00 p.m. PT / 3:00 p.m. MT**

*We will not accept applications after this deadline.*

## WHAT TYPES OF PROJECTS ARE ELIGIBLE?

This Program will support projects that create opportunities for alternative and renewable energy generation at Community Purpose Buildings. Applications may also include activities related to energy conservation and efficiency for those buildings.

To be selected for funding, projects must demonstrate a positive ROI and significant community impact.

Eligible costs include, but are not limited to, the purchase and/or installation of alternative and renewable energy generation systems such as:

- Solar panels;
- Biomass energy boilers;
- Heat storage;
- Air or ground source heat pumps;
- Micro hydro systems; and
- Wind turbines.

In addition to the eligible costs listed above, the Program may also consider costs associated with energy conservation and efficiency improvements such as:

- Air sealing;
- Heating, ventilation, and air conditioning upgrades;
- Increase in insulation values; and
- Thermostat and other controls.

**HOW MUCH OF MY PROJECT WILL THE TRUST FUND?**

The Program will fund capital purchases, installation costs and consulting fees as follows:

<b>Eligible Expenses</b>	<b>Grant Maximum</b>
Alternative & Renewable Energy Generation	Maximum of 75% of the cost of eligible cash expenses up to a maximum of \$100,000.

*In addition to the primary costs of the project (above) the Program will fund:*

<b>Eligible Expenses</b>	<b>Grant Maximum</b>
Energy Conservation and Efficiency	Maximum of 50% of the cost of eligible cash expenses up to a maximum of \$100,000
Electric Vehicle Charging Station Installation (level 2)	Maximum of 50% of the cost of eligible cash expenses up to a maximum of \$4,000

Please note:

In-kind contributions will not be counted towards the total cash budget or proponent’s required cash contribution.

**WHAT TYPES OF PROJECTS ARE NOT ELIGIBLE?**

The Trust retains the right to determine individual project eligibility. Projects are **not** eligible if they:

- do not have the potential for energy generation;
- occur on or in buildings owned by for-profit organizations or provincial and federal governments;
- occur on or in non-profit affordable housing buildings;
- take place outside the Basin; or
- relieve any level of government of its obligations.

**CAN I APPLY FOR MULTI-YEAR FUNDING?**

Yes, multi-year funding requests are eligible.

If you’re requesting funding for a project that exceeds 12 months, provide detailed rationale as to why the project requires this length of time to be a success. Project funding is limited to a 36 month maximum.

*Note: Your budget should reflect the cash required to complete the project over the entire timeframe listed in the application.*

## CAN I APPLY FOR MORE THAN ONE PROJECT?

Yes, you may apply for up to three projects per intake. However, we strive to distribute funds between applicants, regions and types of projects.

If you are submitting more than one request, please indicate an order of priority for submitted application (highest and lowest priority) in the 'Additional Information' section of the application.

## HOW DOES THE TRUST SELECT PROJECTS FOR FUNDING?

The Program will fund projects to help buildings become financially sustainable in the long term due to energy generation and conservation.

### *Step 1: Qualification Assessment*

Project applications will be assessed and be qualified based on:

- Completeness of application;
- Community impact, support and demonstrated need;
- Demonstrated potential for energy generation; and
- Demonstrated ROI.

Selected projects will go to Step 2.

### *Step 2: Feasibility Analysis and Audit*

Qualified projects will undergo a review comprised of an Energy Generation Feasibility Analysis (EGFA) and an ASHRAE Level 1 energy audit (Level 1 Audit).

- The EGFA will evaluate the potential for alternative and/or renewable energy generation; and
- The Level 1 Audit will help determine the ability to improve a building's energy performance and energy savings relative to the required investment.

Selected projects will go to Step 3.

### *Step 3: Due Diligence and Project Definition*

Further due diligence and project definition will be completed.

Selected projects will go to Step 4.

### *Step 4: Final Funding Approval*

## WHEN WILL I HEAR THE RESULTS?

Step 1 of the selection process usually takes *up to eight weeks*.

We will contact you *by email*, at the email address on your application form, to let you know if your project has been approved for funding.

Selection timelines for Steps 2-4 will be project dependent.

Throughout the selection process, we will also let you know whether there are conditions you'll need to address, and whether you'll receive full or partial funding.

We will then send a Contribution Agreement for signature and you will receive the funding after both parties sign that agreement and all conditions have been met.

## WHEN CAN MY PROJECT START?

Projects can start after you receive funding approval from the Trust.

Grant money can only be put toward approved project expenses that occur *after* you receive confirmation of Final Funding Approval.

Applicants should plan to start their project work no earlier than March 1, 2019.

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

Even if a project meets the eligibility criteria it may not be selected for funding as the Trust typically receives requests for more funding than what is available.

The Trust will use its discretion to determine project eligibility and the amount of funding it may allocate to each project and to offer part or all of the Trust portion of the funding request.

## HOW DO I APPLY?

Applications are online and application instructions are described in the next section of this Guide. We strongly encourage all applicants to read the directions in the *Application Guide* section of this document, prior to filling out the application form.

## APPLICATION GUIDE

### USING THE ONLINE APPLICATION FORM

The Trust's online application system allows you to apply to various programs offered by the Trust. You will need to create an account to access application forms, save drafts and submit completed forms. Here are some tips for using the system:

- When logged in you can only work on one draft application per program. You must submit an application before you can begin another application within that specific program. Submitted applications can be edited up until the deadline.
- Drafts and submissions can be viewed once you have logged in.
- To ensure that your edits are saved, click the **Save Draft** button at the bottom of each page often, especially before navigating away from the page.
- **DO NOT CLICK YOUR BROWSERS BACK BUTTON**: your application form will not auto-save and you will lose your work. However, the application form will auto-save when you click the **Next** and **Previous** buttons to navigate between pages.



- Keep your entries precise and clear. It is important to note that space in some sections is limited. Space allotment is identified in each section.
- You have the option to use a worksheet to prepare your application entries and/or collaborate with others involved in your project. The worksheet is a Word document and will not be accepted as your application to the program. All of the questions you will be asked on the online application form are included on this worksheet.

### COMPLETING THE APPLICATION FORM QUESTIONS

#### APPLICANT INFORMATION

**Organization Legal Name**

Enter the full legal name of your registered non-profit, public organization, municipality, regional district or Indigenous organization.

**BC Registry Incorporation/Registration or Business Number (if applicable)**

Registered non-profits and businesses must be in good standing with the BC Registry Services. Enter your number here.

**Signing Authority Contact Information**

If your application is successful, we will be sending a Contribution Agreement to this contact for signature.

**Check if Signing Authority information is the same as Project Contact information.**

## **Primary Contact Information**

Identify the person who will be leading the project, or if they are not in place at this time, identify someone in your organization who can be contacted about your project either at the application stage or if your application is successful.

## **Organization Mandate (120 words)**

Briefly describe your organization's purpose and mandate. Include the types of projects, programs and services you deliver and your operating budget.

## **PROJECT DETAILS**

### **Project Title**

Your project title should be succinct, descriptive and no longer than five words.

### **Project Location**

You will be asked to select location(s) from a drop down menu which represents all municipalities, regional district areas and First Nation communities in the Basin area.

Identify the geographical location(s) that will benefit from this project.

### **Estimated Start & End Date**

Tell us when the project will begin and end. The end date should be when you anticipate all expenses will be paid for and final reports will be ready.

Grant funds cannot be allocated to any project expenses before you have received funding approval. It is recommended that your start date is no earlier than March 1, 2019.

Projects must be completed within 36 months of receiving final funding approval.

### **What will the project do? How will this be achieved? (220 words)**

Provide a brief description of your project and the short and long term impacts or effects your project aims to achieve. Quantify the impact whenever possible.

For example:

- We are planning to upgrade our community complex and cluster of community buildings to decrease energy consumption and realize fuel savings on our annual operating budget by:
  - Installing a biomass energy boiler to replace the existing oil furnace in the Community Hall. The boiler will use wood waste from the local saw mill to heat the hall. Annual fuel savings are estimated to be approximately \$12,000;
  - Installing an air-source heat pump to replace electrical baseboards in the adjacent community kitchen. Annual savings are estimated to be \$6,000; and



- Installing solar panels on the adjacent sports field washrooms to replace the existing electrical baseboards. Annual savings are estimated to be \$4,000.
- In addition to these capital upgrades all buildings will receive air sealing and increase their existing roof insulation from R20 to R50.
- An electric charging station will be installed in the Community Complex parking lot to encourage use of electric vehicles.
- This project will decrease greenhouse gas emissions and make the community more sustainable in the long term.

**What issues or opportunities will be addressed? How were they identified? (150 words)**

Describe the issues or opportunities that the project will address. How were they identified and who was involved in that identification?

**Where will the project take place? (100 words)**

Be specific about where the project will take place. List the name(s) and physical address(es) of the building(s) where the renovations and upgrades will take place.

**Who will be involved in implementing the project? (100 words)**

Describe the organization(s), staff or consultants, partners or individuals, and their relevant experience and expertise that they are bringing to the project.

**Explain why this project is important to your community. (150 words)**

“Community” may refer to a community of interest, specific sector, professional community or a geographic location. With this in mind, explain why this project is important to your community and highlight how it was identified as a priority. Describe how your community will be supporting and/or participating in your project’s development and/or delivery.

**How many people will directly benefit from the project and who are they? (150 words)**

Who is the project going to support? How many people will participate or receive support a result of completing the project?

**How will the project be evaluated and how will you know if it has been successful? (150 words)**

Indicate a clear plan for evaluating and reporting on results as they are related to the shorter-term impacts or effects that your project aims to achieve. Include how you will make use of monitoring and evaluation tools. The budget should include an allocation specifically for evaluation.

**Why is your organization best suited to deliver the project? (150 words)**

Describe past successes of your organization as it relates to this project. Projects that have received funding previously should include a summary report of results to date. You can summarize details here and/or include a supporting document for more information.

## Calculate the Return on Investment (ROI) for your project. (200 words)

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 project’s lifespan / initial cost).

Example A:

Total Annual Savings (Project Lifespan is 10 years at \$100 per year) = \$1,000

Initial Cost = \$5,000

$(\$1,000/\$5,000) = \text{ROI} = 20\%$

Example B:

Total Annual Savings (Retrofit Lifespan is 8 years at \$500 per year) = \$4,000

Initial Cost = \$24,000

$(\$4,000/\$24,000) = \text{ROI} = 17\%$

## WORKPLAN

Tell us how you plan to organize and carry out your project.

### Activity

List all activities you plan to complete during the project’s term.

### Overseen By

Indicate who will be taking the lead on each of the proposed activities. We will want to see that all components of the project are being delivered or managed by someone with relevant experience or expertise.

### Start and End Dates

Identify the date that each activity is proposed to begin and end. Any activities that occur before receiving project approval are not eligible for funding. Project start dates should be no earlier than March 1, 2019.

## PROJECT CASH BUDGET

List specific budget items under each heading to identify your expenses that you require cash for. Round up values to the nearest dollar. Click the **+Add** button to add another row. Do not include any items that will be provided to the project as in-kind contributions.

Budgets that contain excessive rates or unreasonable purchases will not be considered and may jeopardize project approval.

The Program will fund capital purchases, installation costs and consulting fees as follows:

Eligible Expenses	Grant Maximum
Alternative & Renewable Energy Generation	Maximum of 75% of the cost of eligible cash expenses up to a maximum of \$100,000

*In addition to the primary costs of the project (above) the Program will fund:*

Eligible Expenses	Grant Maximum
Energy Conservation and Efficiency	Maximum of 50% of the cost of eligible cash expenses up to a maximum of \$100,000
Electric Vehicle Charging Station Installation (level 2)	Maximum of 50% of the cost of eligible cash expenses up to a maximum of \$4,000

Please note:

In-kind contributions will not be counted towards the total cash budget or proponent's required cash contribution.

**Project Cash Budget EXAMPLE:** This reflects the total cash required to complete the project.

CASH BUDGET ITEM	Total Amount Required
<b>Alternative &amp; Renewable Energy Costs @75% (Max. \$100,000)</b>	
Solar Panels	\$12,000
Biomass energy boiler	\$25,000
Air Source Heat pump	\$20,000
<i>Total Amount Required:</i>	<i>\$57,000</i>
<b>Total Eligible Funding:</b>	<b>\$42,750</b>
<b>Energy Conservation and Efficiency Costs @50% (Max. \$100,000)</b>	
Attic Insulation	\$25,000
Air Sealing	\$500
Consultant	\$4,000
<i>Total Amount Required:</i>	<i>\$29,500</i>
<b>Total Eligible Funding:</b>	<b>\$14,750</b>
<b>Electric Charging Station Costs @50% (Max \$4,000)</b>	
Electric Charging Station	\$8,000
<i>Total Amount Required:</i>	<i>\$8,000</i>
<b>Total Eligible Funding:</b>	<b>\$4,000</b>
<b>TOTAL AMOUNT REQUIRED:</b>	<b>\$94,500</b>
<b>TOTAL ELIGIBLE FUNDING:</b>	<b>\$61,500</b>

## CASH REVENUE SOURCES

We recommend that your organization seeks cash funding from a variety of sources. Projects that have secured multiple funding sources often demonstrate wide-ranging support and may be prioritized for funding.

The Trust has a directory of grants that may be applicable to your work which can be found in the resource section of our Non-profit Advisors Program webpage ([ourtrust.org/nonprofit](http://ourtrust.org/nonprofit)).

### **Source**

In the first line labelled *Columbia Basin Trust*, indicate what you are requesting in this grant application.

Please Note: The amount requested from the Trust cannot exceed the amount listed in 'Total Eligible Funding' listed above.

Identify your other sources for cash revenue. This may include sources such as other grants, cash donations

### **Applied (Y/N)**

Indicate whether or not you have applied for other funding.

### **Confirmed (Y/N)**

Indicate whether or not the contribution is confirmed at the time you submit the application to the Trust. If the funder has confirmed that they will be committing resources to your project, select *yes*. If you have applied for funding, but have not yet heard back, select *no*.

### **Amount**

Indicate the dollar amount you will receive from each cash funding source. The form will automatically calculate subtotals for you.

### **Total Project Cash Budget and Total Cash Revenue Project Budget**

These boxes will auto-fill. *Total Project Revenue* must equal *Total Project Budget* to show you have enough funds to complete your project. If the numbers are not equal, recheck your entries.

**Cash Revenue Sources EXAMPLE**

This reflects who else is contributing cash to the project. Identify if you have submitted an application and if you have received confirmation of approval of any additional funding.

*Note: The amount requested from the Trust cannot exceed the amount listed in ‘Total Eligible Funding’ listed above.*

<b>CASH REVENUE SOURCES</b>			
<b>Source</b>	<b>Applied (Y/N)</b>	<b>Confirmed (Y/N)</b>	<b>Amount</b>
Columbia Basin Trust	Y	N	\$61,500
ABC Community Services	Y	Y	\$15,000
Community Foundation Grant	Y	N	\$15,000
Building and Reserve Fund	Y	Y	\$3,000
<b>TOTAL CASH REVENUE:</b>			<b>\$94,500</b>

**IN-KIND SOURCES & CONTRIBUTIONS**

**In-kind Sources & Contributions (200 words)**

Describe what contributions are being made to the project other than cash.

In-kind contributions are goods or services donated to your project from another organization or individual that you would have otherwise had to pay for.

For example:

- Society Executive Director will oversee the project: \$35/hour @ 4 hrs/month for 24 months valued at \$3,360
- Office space is being provided by a community partner
- Supplier discount valued at \$4,400

**SUPPORTING DOCUMENTS**

Supporting documents provide additional evidence that the project is viable and important.

*You may upload up to six supporting documents.*

Ensure your supporting documents add value to your application and are as concise as possible. We will look at the strength of the document, not the quantity.

You may wish to include documents like:

- letters of support or outcomes of community engagement
- relevant report executive summaries
- equipment purchase and installation quotes
- building, zoning, licensing or council/board approvals

1. List what you are submitting.
2. Before uploading your supporting document, ensure the file name is clear and identifies the content.
3. File size may not exceed 3MB per document.

## ADDITIONAL INFORMATION

**Is there anything else you would like to add that has not already been mentioned? (220 words)**

Include anything else you would like to add. Be sure it is something that is not already addressed in this application.

If you are submitting more than one application in this intake, please indicate an order of priority here.

**What is the main, and first, way you heard about this grant program?**

Choose only one.

**Would you like to receive email correspondence from the Trust?**

Select yes or no from the drop down options.

**Does your organization have social media accounts?**

Share your account names and we can connect.

**How do you like to receive news and hear about updates from the Trust?**

Choose as many as applicable

## DECLARATION

Read this section. Click the box next to I agree, then type in your name and title.

## SUBMISSION

Click Submit. You will receive an automatic reply from us shortly after clicking submit, confirming that your application has been received.