

Funding Request Form

The High-rise Retrofit Improvement Support (Hi-RIS) program, (the “Program”) supports multi-residential property owners in completing energy and water retrofits at qualifying properties in the City of Toronto. The Funding Request Form is the second step of the process to access funding from the Program. Applicants are also required to complete and submit an Expression of Interest Form to confirm eligibility for the Program and determine the maximum amount of funding available for the property.

Following receipt of a completed Funding Request Form for an eligible property, the City will notify the Property Owner(s) via the Primary Contact and prepare a Property Owner Agreement, an agreement between the Property Owner(s) and the City of Toronto. The Property Owner Agreement must be signed by the Property Owner(s) in order to access funding from the Program.

A sample of the Property Owner Agreement and other documents required as part of the Hi-RIS application process can be found in the Program information on the Program website at www.toronto.ca/tower_renewal.

Any questions regarding this form or the Program can be directed to tower@toronto.ca or 416-397-5257.

Project ID Number: *Please specify the number provided in the Notice to Proceed letter*

Property Address: *Please specify the full address of the property*

A – APPLICANT INFORMATION

The Property Owner(s) may have identified a primary contact in Section A ii of the Expression of Interest Form. The Primary Contact is the person to whom all correspondence regarding the Program, including any legal notices under the Property Owner Agreement with the City, will be directed.

Have the names of the Primary Contact and/or any of the Property Owner(s) have changed from the information provided to the City on the Expression of Interest Form?
() Yes () No If yes, (i.e. the information has changed), please complete Attachment 2.

B – ENERGY ASSESSMENT REPORT

All improvements eligible under the Program that you intend to pursue must be identified in an Energy Assessment Report completed by a certified energy auditor that meets the criteria stated in Attachment 1. The Energy Assessment Report must be submitted together with this Funding Request Form, as Attachment 3.

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<p>The Energy Assessment Report must contain the following elements and meet the following conditions. Please mark a check below to confirm that the Energy Assessment Report:</p> <p><input type="checkbox"/> was conducted by a certified energy auditor who meets the criteria stated in Attachment 1.</p> <p><input type="checkbox"/> includes baseline energy use information for the building for a minimum period of 12 months. Baseline water use information should be provided if water improvements are recommended.</p> <p><input type="checkbox"/> specifies recommended energy efficiency improvements and/or water conservation improvements.</p> <p><input type="checkbox"/> indicates anticipated energy/water consumption and cost savings.</p> <p><input type="checkbox"/> specifies cost range and the estimated lifetime of the recommended improvements.</p> <p><input type="checkbox"/> indicates potential eligibility for incentives related to the recommended improvements.</p>	
Date of the Energy Assessment Report (yyyy-mm-dd):	
Name of certified energy auditor (First, Last):	
Company Name for the certified energy auditor:	
Mailing Address:	
Telephone Number:	Email Address:

C - PROJECT SCHEDULE	
<p>The City will use the dates provided in this section to establish key dates for the Property Owner Agreement. Please ensure that the information provided is complete and accurate.</p>	
a) Expected Project Start Date:	
b) Expected Completion Date for all Improvements:	
c) Expected Date for Property Owner Approval of the completed Improvements:	

D - SUMMARY OF PROJECT DETAILS
<p>Please complete Table A on the following page to provide details about improvements with which you intend to proceed and for which you are requesting funding through the Program. To be eligible for funding, proposed improvements must be recommended in the Energy Assessment Report. Double-clicking on the table will open a fillable spreadsheet.</p>

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TABLE A: LIST OF INTENDED IMPROVEMENTS

#	Description of Intended Improvement(s)	Type of Improvement (i.e. Building Envelope, Mechanical Systems, Water Fixtures)	Contractor Name	Estimated Cost of Improvement(s)	Estimated Lifetime of Improvement (years)	Recommended in the Energy Assessment report ?
	<i>Indicate <u>ONLY</u> those improvements from the Eligible Improvements included in the attached Energy Assessment Report that the Property Owner intends to have the contractor complete and describe each improvement. (i.e. equipment type, size, materials, efficiency rating, make/model, etc.)</i>	<i>Refer to the Program website for the types of qualifying improvements</i>	<i>Identify the Name of the Contractor Company providing a cost estimate.</i>	<i>Indicate the estimated cost of each Intended Improvement provided in the Contractor(s) quotes. The Estimated Cost includes the costs of equipment and/or materials, labour and HST.</i>	<i>Indicate the Estimated Lifetime of each of the Intended Improvements.</i>	
						Please mark a check (✓) below to indicate yes
1						()
2						()
3						()
4						()
5						()
6						()

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E – PROGRAM INTEREST RATE AND TERMS		
Please select the interest rate* and terms that best suit your needs. Note: The term cannot exceed the Estimated Lifetime of the Intended Improvements.		
	Term	Interest Rate (Annual)
<input type="checkbox"/>	5 years	2.50%
<input type="checkbox"/>	10 years	3.75%
<input type="checkbox"/>	15 years	4.25%
<input type="checkbox"/>	20 years	4.50%

* In addition to the interest rate, an administrative charge of 0.8%, reflective of the City of Toronto's cost of administering the Program, will be applied and calculated on the final funding amount. The administrative charge will be billed over the repayment term.

F – ESTIMATED COSTS AND INCENTIVES	
Please complete the following to provide details about the amount of funding requested from the Program.	
Estimated Cost of Intended Improvements (from Section D)	\$ _____
Less: Estimated Incentives / Rebates to be received	\$ _____
Total Estimated Funding Amount:	\$ _____
Is an initial funding disbursement requested*?	<input type="checkbox"/> Yes <input type="checkbox"/> No

* The City will provide funding to approved applicants in the Program via a single disbursement paid by the City once the project is completed and the City has approved project costs and other required documents, unless an initial funding disbursement is requested for the project. If an initial disbursement is requested, the Property Owner will be required to submit additional documentation. Please contact the Program Manager at tower@toronto.ca or 416-397-5257 for details.

G – ADDITIONAL DOCUMENTS TO BE PROVIDED:	
The following documents must be submitted to the City with this Funding Request Form. The documents are part of the Funding Request Form and their contents are incorporated into this Funding Request Form as if fully stated on the form directly. Please mark a check below to indicate that the documents have been submitted with this form:	
<input type="checkbox"/>	An Energy Assessment Report completed and certified by a certified energy auditor who meets the criteria stated in Attachment 1 is attached as Attachment 3.
<input type="checkbox"/>	Copies of final signed Contractor quote(s) for the Intended Improvements specified in section D are attached as Attachment 4.
<input type="checkbox"/>	A void, blank cheque for the account that will be debited for the City's Pre-Authorized Property Tax Payment Program is attached as Attachment 5. Property Owners participating in the Program must enrol in the Pre-Authorized Property Tax Payment Program to pay the tax bill, including property taxes and special charges imposed pursuant to the Program, for the property via 11 instalments per year.

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PROPERTY OWNER(S) SIGNATURE(S)

I/We the undersigned Property Owner(s) hereby:

- Attest that all the information submitted as part of this application is truthful and accurate;
- Give permission to the person identified as the Primary Contact in this application to engage with representatives of the City on behalf of the Property Owner(s) with respect to all Program matters;
- Have read and understand the Program information provided on Program website, understand that the Property Owner(s) will be required to: i) sign a Property Owner Agreement between the City and the Property Owner(s), ii) complete the Program application process in order to receive funding under the Program, and iii) repay any funding received under this Program through payment of a special charge added to the Property's tax roll by the City; and
- Consent to the participation of the Property in the Program.

	Property Owner Name (printed):	Signature of Property Owner or Authorized Representative*	Name (First, Last) and Title of Authorized Representative
1			
2			
3			
4			
5			

* If the Property Owner is not a natural person (e.g. a corporation), please provide the signature of the legally authorized representative for that Property Owner in column 2 and the name and title in column 3.

Please submit completed form via email, fax or mail to:

Hi-RIS
City of Toronto
Tower Renewal Office
14th Floor, East Tower
Toronto ON M5H 2N2

Fax: 416-392-4976
email: tower@toronto.ca

Note: Fax and email may not be secure means of transmission for personal information.

The personal information on this form is collected under the authority of City of Toronto Act, S.O. 2006, Chapter 11, Schedule A, s. 136 (c) and City Council decision EX33.22 on July 16 - 19, 2013. The information collected will be used by City Divisions to assess and determine the eligibility of applicants for the Program; and subsequently, to communicate with property owners regarding Program funding. Questions about this collection can be directed to the Project Manager, Tower Renewal, 100 Queen Street West, 14th Floor East Tower, Toronto City Hall, Toronto, Ontario, M5H 2N2 or by phone at 416-397-5257.

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Attachment 1

Criteria for the Energy Assessment Report

As part of the Program application process, the City requires property owners to have a building energy assessment (also referred to as an energy audit) completed by a professional certified energy auditor that meets the eligibility criteria set out below. The City's requirements for the energy assessment are aligned with the energy audit requirements outlined by Toronto Hydro and Enbridge Gas for their respective incentive programs. This alignment will help to maximize opportunities for utility incentive funding for participating property owners.

To meet program eligibility requirements, the energy assessment and related report must be completed by a certified energy auditor with expertise in building energy efficiency who meets the following criteria:

- (i) a professional engineer ("P.Eng."), a certified engineering technologist ("CET"), a certified energy manager or a certified measurement and verification professional; with a minimum of three years of experience evaluating energy systems in buildings; or
- (ii) an engineer-in-training under the supervision of a P.Eng. or a CET, only if a qualified and experienced person as described in (i) above certifies and signs the energy assessment report; and
- (iii) the certified professional that meets (i) or (ii) must be third party to the Program applicant.

Property owners will be responsible for engaging a certified professional to complete the building energy assessment and will assume any associated costs. Property owners may be able to offset these costs through incentives from Toronto Hydro or Enbridge Gas and are encouraged to check the Program website for information on incentives.

Property owners will also be responsible for any costs incurred by the City to verify the Energy Assessment Report and these costs will be recovered as part of the Program administration costs.

The property owner is required to provide the City with an Energy Assessment (energy audit) Report that includes the identification of:

- recommended energy efficiency and/or water conservation improvements (or measures);
- baseline energy use information for a minimum period of 12 months and baseline water use information, if water improvements are recommended;
- the anticipated energy/water consumption and cost savings;
- the estimated lifetime (or expected useful life) of the recommended improvements;
- the cost range for the recommended improvements; and
- potential eligibility for incentives for the recommended improvements.

A comprehensive energy assessment (audit) is required which is an onsite audit and subsequent report that investigates all building components for potential energy reduction opportunities. The energy assessment must be comprehensive so that all options are

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considered and the potential to increase savings can be assessed. For example, where more efficient lights create less heat, the report should indicate the extent to which this affects the building's heating load in winter and cooling load in summer.

In addition to the required elements of the Energy Assessment Report noted above, a comprehensive Energy Assessment Report should include the following:

- A written description of the physical characteristics of the building, as well as its current condition, age and construction type;
- A description of the existing major equipment in the building including lighting, all sources of heating and cooling, their energy consumption and fuel type as well as the manufacturer, model number, physical condition and years of service;
- A complete breakdown of the building's current energy consumption by end-use type such as lighting, space cooling, space heating, water heating, ventilation, refrigeration and plug loads.
- An analysis of the recommended energy saving and/or water conservation improvements and their resulting net effect on energy/water consumption of other systems in the building.

The Energy Assessment Report should describe both the current equipment and the recommended improvements. The report must provide enough information for program staff to evaluate the proposal without requesting further details.

The report provided by an eligible certified professional will be reviewed by either City staff or a third party to determine the reasonableness of the associated costs of the proposed retrofit project. In the instance where property owners are applying to the Program for improvements that have received prior approval from Enbridge or Toronto Hydro, the Enbridge and/or Toronto Hydro approval may suffice as third-party verification for those improvements.

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Attachment 2

Updated Applicant Information

Please complete the Applicant Information section below ONLY if the information provided to the City in the Expression of Interest Form has changed.

A – APPLICANT INFORMATION	
i) Legal Names of Property Owner(s)	
() Check and complete if information has changed	
All companies or individuals listed as owners on the registered title for the property (the "Property Owner(s)") must be identified and consent to participate in the Program. Please indicate below any Property Owner(s) information that has changed from information provided in the Expression of Interest form. If the Property Owner is a company, please provide the full legal name of the company and if it is an individual, please provide first and last name.	
Name of Property Owner 1:	
Name of Property Owner 2:	
Name of Property Owner 3:	
Name of Property Owner 4:	
Name of Property Owner 5:	
ii) Applicant Primary Contact	
() Check and complete if information has changed	
Name of the Primary Contact (First, Last):	
Position of Primary Contact:	
Relationship to the Property Owner: owner / manager / other (<i>please specify</i>): _____	
Mailing address (Street address, City and Postal Code):	
Telephone Number:	Fax Number:
E-mail address:	

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Attachment 3

Energy Assessment Report for the Property

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Attachment 4

Copies of the Final, Signed Contractor Quote(s) (specified in section D)

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Attachment 5

**Void, blank cheque for the account that will be debited for the City's
Pre-Authorized Property Tax Payment Program**