



High-rise Retrofit Improvement Support (Hi-RIS)

Funding Request Form

The High-rise Retrofit Improvement Support (Hi-RIS) program, (the “Program”) supports multi-residential property owners in completing energy and water efficiency and renewable technologies improvements 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. You 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 to a maximum of 10% of the current value assessment.

Following receipt of a completed Funding Request Form for an eligible property, the City will notify you 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 Hi-RIS documents can be found in the Program information on the Program website at www.toronto.ca/hi-ris.

Any questions regarding this form or the Program can be directed at tower@toronto.ca or 416-392-9688.

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.

Check (✓) if the name(s) 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. If 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 qualified 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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The Energy Assessment Report must contain the following elements and meet the following conditions. Please check (✓) below to confirm that the Energy Assessment Report:	
	was conducted by a qualified energy auditor who meets the criteria stated in Attachment 1.
	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.
	specifies recommended energy efficiency improvements, water conservation improvements and/or renewable technologies improvements.
	indicates anticipated energy/water consumption (expressed as a quantity and a percentage) and cost savings for the recommended improvements.
	specifies cost range of each of the recommended improvements.
	indicates potential eligibility for incentives related to the recommended improvements.
	specifies the expected useful life (the estimated lifetime) of each improvement.
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	
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.	
a) Expected Project Start Date:	
b) Expected Completion Date for all Improvements:	

D - SUMMARY OF PROJECT DETAILS
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 (energy audit) Report and you must provide contractor quotes on the measures being considered for implementation.

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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, Renewable Technologies)	Contractor Name	Estimated Cost of Improvement(s)	Estimated Lifetime of Improvement (years)	Recommended in the Energy Assessment report ?
	Indicate <u>ONLY</u> those improvements from the Eligible Improvements included in the attached Energy Assessment Report that the Property Owner intends to complete. Please describe each improvement (i.e. equipment type, size, materials, efficiency rating, make/model, etc.).	Refer to the Program website for the types of qualifying improvements	Identify the Name(s) of the Contractor(s) providing a cost estimate.	Indicate the estimated cost of each Intended Improvement provided in the Contractor(s) quotes including equipment, materials, labour and HST.	Indicate the Estimated Lifetime of each of the Intended Improvements.	
						Please mark a check (✓) below to indicate yes
1						
2						
3						
4						
5						
ESTIMATED TOTAL COST OF INTENDED IMPROVEMENTS						

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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.		
Check (✓)	Term	Interest Rate (Annual)
<input type="checkbox"/>	5 years	2.00%
<input type="checkbox"/>	10 years	2.75%
<input type="checkbox"/>	15 years	3.50%
<input type="checkbox"/>	20 years	3.75%

* 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 Table A)	\$ _____
Less: Estimated Incentives / Rebates to be received	\$ _____
Total Estimated Funding Amount:	\$ _____

* 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. Please contact the Project Manager at tower@toronto.ca or 416-392-9688 if you have any questions.

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 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 qualified 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 Table A are attached as Attachment 4.
<input type="checkbox"/>	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. If the property is not currently enrolled, a program application is attached as Attachment 5.

PROPERTY OWNER(S) SIGNATURE(S)

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

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- 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;
- Acknowledge that the Property Owner(s) will obtain independent legal and financial advice with respect to participation in the Program; 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:

City of Toronto - Hi-RIS
Tower and Neighbourhood Revitalization Unit
15th 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 PE18.4 on April 26 - 28, 2017. 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 Program Manager, 100 Queen Street West, 15th Floor East Tower, Toronto City Hall, Toronto, Ontario, M5H 2N2 or by phone at 416-397-5257.

Funding Request Form

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 qualified 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](#).

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 (energy 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 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.

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In addition to the required elements of the Energy Assessment (energy audit) 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 (✓) 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 (✓) 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

PRE-AUTHORIZED PROPERTY TAX PAYMENT PROGRAM APPLICATION



Application

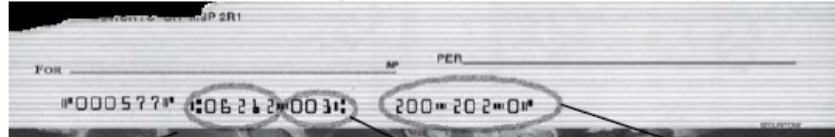
Pre- Authorized Tax Payment

Applicant Information

Instalment Plan: <input type="checkbox"/> 2-Instalment <input type="checkbox"/> 6-Instalment <input checked="" type="checkbox"/> 11-Instalment <small>If an option is not selected, you will be enrolled in the 11-Instalment Plan</small>	
Assessment Roll Number (21 digits):	
Property Address:	
Property Owner(s):	
Signature*:	Signature*:
My/our application is for <input type="checkbox"/> Personal or <input type="checkbox"/> Business PAD service <small>* By signing this form you agree to the terms and conditions listed on page 2. Please provide additional signatures, if more than one signature is required on cheques issued against the account. Please review, print, sign, and return your application form.</small>	
Date (YYYY/MM/DD):	Date (YYYY/MM/DD):
Telephone (Day):	Telephone (Day):

Financial Institution Information

Please attach a void cheque or have your bank/financial institution complete the following.



Financial Institution (FI) Transit Number:	FI Number:	Account Number:
FI Name:		
FI Address:		
Name of FI Officer:		
FI Officer Title:		
Signature of FI Officer:	FI Officer Phone Number:	

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Application

Pre- Authorized Tax Payment

Conditions

I/we authorize the City of Toronto Revenue Services Division (herein referred to as the "City") and the financial institution designated (or any other financial institution I/we may authorize at any time) to begin deductions as to the type of plan selected on this application (namely the two, six or eleven instalment plan).

I/we understand that the City will issue a tax bill indicating the amount of my/our instalments and the dates of withdrawal from my/our financial institution account. The City will notify me/us in writing at least 10 days prior to the date of the withdrawal if the amount is to be increased. I/we can waive our right to this notice requirement if I/we authorize the city verbally.

I/we understand that I/we may cancel my/our PAD agreement by providing a signed written notice to the City at least 15 days before the next debit is scheduled and the notice must be sent to the City address indicated on this form. I/we also understand that the City may terminate this authority if any of my/our payments are returned by my/our financial institution as per the conditions of enrolment in the City's Pre-Authorized Tax Payment Program. I/we may obtain a sample cancellation form or more information on my/our right to cancel this PAD agreement at my/our financial institution or by visiting www.cdnpay.ca, the Canadian Payments Association website or www.toronto.ca/taxes/property_tax, the City's website.

I/we have certain recourse rights if any debit does not comply with this agreement. For example, I/we have the right to receive reimbursement for any PAD that is not authorized or is not consistent with this PAD agreement. To obtain a form for a Reimbursement Claim, or for more information on my/our recourse rights, I/we may visit www.cdnpay.ca or may contact my/our financial institution.

I/we understand that all taxes must be in good standing to qualify.

Important Information

The application date will be the date received if not completed.

You will receive written confirmation of your enrolment in this program within 30 days of receipt of your application form.

Financial institution/banking information is not printed on the bills.

Line of credit accounts and credit card cheques cannot be used for pre-authorized payments.

The payment plan is not transferable to another account.

Supplementary/Omitted tax bills and statements or other charges cannot be paid through this program.

You must complete, sign and return this full form to register. Incomplete forms will be returned.

Submit Applications and Documents

Mail: Revenue Services
Box 2500, Terminal A
Toronto, Ontario M5W 1H2

Fax: 416-392-0799
(sending personal information by fax is not a secure means of transmission)

Personal information on this form is collected under the authority of the City of Toronto Act, S.O. 2006, Chapter 11, Schedule A, s. 136 (b) & (c) and City of Toronto By-law No. 4-1998. The information will be used to administer the Pre-Authorized Payment program. Questions about this collection can be directed to the Manager, Customer Service, Revenue Services, 5100 Yonge Street, Toronto, Ontario, M2N 5V7 or by phone at 416-338-4829.