

SCHEDULE F – PROJECT COMPLETION REPORT TEMPLATE

VERY IMPORTANT:

Timing: You need to email a report, to your GMF project officer (contact info is in Schedule C), on the dates indicated in Schedule C or whenever FCM asks for such a report.

Copyright: Before you submit a report to FCM, make sure you hold the copyright for the report. If you're hiring a consultant to prepare the report, please make sure to get the copyright (see FCM's copyright tips document), otherwise FCM will not be able to disburse the Grant Amount.

Accessibility for people with disabilities: Please do not change the format, font, layout, etc. of this report. This template has been specially designed, following FCM's Accessibility Guidelines, in order to be accessible to people with disabilities.

Confidentiality: If your report contains any Confidential Information that you would prefer not be made available to the public (e.g. through a case study or other materials produced by FCM that relate to your Project), please submit two versions of the report:

1. **Complete report including Confidential Information:** Please clearly label this report with the word "**Confidential**" or similar wording and FCM will treat it as confidential.
2. **Abridged report excluding Confidential Information:** This report may be posted on the FCM website and otherwise made available to interested third parties, to help FCM meet its knowledge sharing objectives.

Please contact your project officer to receive an electronic copy of the Completion Report Template.

Upon completion of the project, a copy of the Final Deliverable must be submitted along with this Completion Report.

FCM will post your report on the [Green Municipal Fund™ \(GMF\) website](#). This is because one of FCM's mandates is to help municipal governments share their knowledge and expertise regarding municipal environmental projects, plans and studies.

How to complete the Completion Report

The purpose of the Completion Report is to share the story of your community's experience in undertaking your project with others seeking to address similar issues in their own communities.

Please write the report in plain language that can be understood by people who are not specialists on the subject. A Completion Report is typically in the range of 5–10 pages, but may be longer or shorter, depending on the complexity of the project.

GMF grant recipients must enclose **final** copies of the Completion Report and the Final Deliverable with their final Request for Contribution. The reports, including all attachments and appendices, must be submitted in PDF format with searchable text functionality. Reports that are not clearly identifiable as final reports, such as those displaying headers, footers, titles or watermarks containing terms like "draft" or "for internal use only," will not be accepted by GMF. Additionally, reports must be dated. If you have questions about completing this report, please consult GMF staff.

GMF number	17542
Name of lead applicant (municipality or municipal partner)	City of Powell River
Name, title, full address, phone, fax and e-mail address of lead technical contact for this study	Anastasia Lukyanova Sustainability Planner 604-485-8649 alukyanova@powellriver.ca
Date of the report	April 22, 2022
Type of study (Feasibility study or Program Design study)	Feasibility study

1. Introduction

- a) Who was involved in doing the Study, and what are their affiliations? Please include name, title and contact information. Those involved could include municipal staff, engineers and other consultants, a representative from a non-governmental organization, and others.

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2. The Study

- a) Please summarize the overall objectives of your study and the key activities or approaches you undertook to meet these objectives.

The goal of the feasibility study was to explore the potential of a community efficiency financing program in the City of Powell River. The study completed a review of home energy efficiency programs implemented in BC to date, conducted an overview of existing utility and other incentive programs, analyzed Powell River housing stock, reviewed potential upgrades, and provided recommendations for program design.

- b) Please describe any public or internal consultations or workshops conducted as part of the Study and their impact on the Study.

As part of the study, Ecotrust Canada facilitated a workshop with City staff and First Credit Union staff to explore if there is an interest in establishing a financing program. The workshop

demonstrated that there is strong alignment between the goals of the City and the goals of the First Credit Union, as well as highlighted some potential challenges that will need to be overcome in the program design phase (specific challenges were the administrative costs for First Credit Union to set up a new financing offer and the administrative cost of setting up security on each new loan of about \$1000 – a potential barrier for smaller loans).

3. **Feasibility Study only: Elements of a Feasibility Study**

- a) Please provide the page numbers from the Feasibility Study report for the following program design elements. If the design element is not in the report, please provide a description of the element.

Elements of a Feasibility Study	Page numbers from the Feasibility Study report or description of the feasibility element
A baseline assessment of a community's housing stock and energy upgrade potential, including assessing building types, energy use profiles and opportunities for energy upgrades to support GHG emissions reductions.	28-39, 53-78
Potential uptake of home energy upgrades in terms of the number of anticipated projects and level of investment required	85-86
Expected environmental, social and economic benefits that could be achieved from these projects	86-96
Homeowner barriers to energy efficiency and renewable energy upgrades and to participation in existing efficiency programs, such as those offered by a utility company or regional efficiency agency	39-53
Evaluation of relevant financing models for your local context	80-84
Engagement with key municipal and external stakeholders on shared goals for a local program	Stakeholders engaged are listed in Appendix C (133-135), engagement results are presented throughout the document

4. **Program Design Study only: Elements of a Program Design Study**

Please provide the page numbers from the Program Design report for the following program design elements. If the design element is not in the report, please provide a description of the element.

Elements of a Program Design Study	Page numbers from the Program Design report or description of the design element
Target audience (e.g. housing stock, socio-economic groups, etc.)	
Participant eligibility criteria	
Eligible energy measures, and non-energy measures if relevant	
Funding sources and budget	
Recommended financing model	
Financing terms and conditions	
De-risking strategies (e.g. credit assessment, municipal loan loss reserve and partial loan guarantee for third-party lenders)	

Program delivery model	
Application of the EnerGuide Rating System and relevant requirements for program participants	
Integration with other relevant incentive programs	
Consumer protection measures	
Marketing and communications strategies	
Workforce training needs	
Program implementation plan	
Stakeholder roles and responsibilities	
Client journey and application process	
Program process flow diagrams	
Program monitoring and evaluation	
Risk identification and management strategies	
Contracting and procurement	

5. Lead Applicant's Next Steps

- a) Taking the Study's recommendations into account, what next steps do you, as the municipality or municipal partner, plan to take? What barriers or challenges do you anticipate with these next steps, and how might these be overcome?

As a next step, we will present the study results to our senior management and have a discussion about the future direction for the program design work. Here in BC, we are in a situation where PACE financing is not an option, and therefore we would be exploring a 3rd party financing program option. We are currently working with FCM staff to clarify what a potential 3rd party financing program could look like in terms of the funding that could be provided by FCM and the portion the City will need to contribute.

Potential challenges for us include addressing contractor and energy advisor shortage in the community, as well as reconciling existing natural gas utility marketing to switch to gas with the need to electrify to reduce GHG emissions.

6. Lessons Learned

In answering the questions in this section, please consider all aspects of undertaking the Study — from the initial planning through each essential task until the Final Study report was prepared.

- a) What activities or partnerships were critical to the success of your Study?

Engagement with the homeowner associations, local contractors, review of previous programs in BC, engagement with the local credit union.

- b) What barriers or challenges (if any) did you encounter in doing this Study? How did you overcome them?

The study identified a few barriers to a possible financing program that will be important to address in the program design phase:

- significant energy advisor and contractor shortage in the community
- lack of PACE legislation in BC
- limited need for financing due to a wide range of incentives available; main barrier is navigating incentive programs and contractors, not so much access to financing
- the biggest GHG reduction is achieved by replacing gas heating with a heat pump, but the gas

utility has aggressive programs marketing gas heating as the cheaper option, hard to counter this narrative

- c) What would you recommend to other municipalities interested in doing a similar Study? What would you do differently if you were to do this again?

We are very happy with the work we've done, it's given us a lot of insight into the barriers to retrofits that exist in our community. We would recommend working with a contractor who understands local context and has been involved in home retrofit work previously.

- d) Do you have a project champion who has been instrumental to the success of the study? If so, please include his or her name, title and contact information, and describe his or her role in the study.

The study was initiated by the City's sustainability planner, Anastasia Lukyanova. The study was also strongly supported by the City's Climate Change Mitigation and Adaptation Committee (CCMAC), and City Councillor CaroleAnn Leishman who holds the climate portfolio on Council.

7. Knowledge Sharing

- a) Is there a website where more information about the Study can be found? If so, please provide the relevant URL.

We have not uploaded the study to our website yet as we would like to get clearer on next steps prior to publishing it. We are currently working with FCM staff on clarifying what funding we would be able to apply for towards a potential third-party financing program.

- b) FCM is developing a Community Efficiency Financing resource library to share tools and best practices on designing and implementing local financing programs for home energy upgrades. In addition to the Study results, has your Study produced any resources or materials that would be useful to share with other communities, such as checklists, toolkits, templates, guidelines, bylaws, videos or information brochures? If so, please attach copies or include the relevant website links.

The study has a lot of helpful insights that would apply to many other BC municipalities, not just our community. We think that it would be beneficial for FCM to make the study available online so other communities can access it.

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This project was carried out with assistance from the Green Municipal Fund, a Fund financed by the Government of Canada and administered by the Federation of Canadian Municipalities. Notwithstanding this support, the views expressed are the personal views of the authors, and the Federation of Canadian Municipalities and the Government of Canada accept no responsibility for them.