

## 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.

<b>GMF number</b>	17570
<b>Name of lead applicant (municipality or municipal partner)</b>	City of New Westminster
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<b>Date of the report</b>	February 4 <sup>th</sup> , 2022
<b>Type of study (Feasibility study or Program Design study)</b>	Program Design 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.

The City of New Westminster collaborated with the District of Squamish, Resort Municipality of Whistler and consultant, Community Energy Association for this program design study.

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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 objective of the study is to detail design for a Concierge service to support homeowners with home energy retrofits. The service will help homeowners from start-to-finish with a home energy retrofit, and for the pilot year, specifically focusing on fuel-switching to an electric air source heat pump. The initial focus on fuel switching is to reduce community GHG emissions, fuel-switching provides the most significant emissions reduction opportunity as compared to other types of home energy retrofits.

A full summary the key activities undertaken and our approach are detailed in our final program report.

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

Stakeholder engagement was essential to the program design process; over 50 individuals were interviewed one-on-one in the development of the Concierge service. Stakeholders from across multiple organizations, associations, and municipalities, nationally and internationally, were sought out to provide specific input into the program design given their experience with relevant programs or processes.

Stakeholders were invited to provide input at multiple points through concierge service model development: first to provide insights based on their particular experience and second to confirm what we heard and how it was incorporated into program design.

Initial stakeholder mapping included internal and external stakeholders. Internal stakeholders included climate change, procurement, planning, building inspection, communications, and legal staff at the CNW, DOS, and RMOW, as well as elected officials: Mayor and Council, climate advisory group / task force, and municipal consultants. External stakeholders included heat pump and mechanical system contractors, energy advisors, industry associations, training providers, program administrators, utilities, community groups, climate advisory committees, and homeowners. As interviews progressed, additional stakeholders were identified and integrated into the program design process.

Our approach to public engagement for design of the Concierge service is guided by the International Association of Public Participation (IAP2) principles. Our public participation goal for all stakeholder groups is to Collaborate.

Our approach to engagement was guided by our goal of collaboration. Prior to engagement, CEA, CNW, DOS, and RMOW co-defined the criteria for identifying and prioritizing stakeholders, the practice commonly referred to as stakeholder mapping. Our stakeholder map initially included both internal and external stakeholders.

At the completion of the stakeholder mapping exercise, a method for engagement for each stakeholder type was identified. As a result of the scope of the project, the variety of stakeholders, and the limitations on gathering as a result of COVID-19 provincial health restrictions, the predominant form of engagement was virtual one-on-one stakeholder interviews. Some interviews were followed up with Q&A sessions for a collection of individuals in a specific stakeholder group. Presentations and focus group discussions were a primary approach for homeowners, and were supplemented by a public survey which was focused on single-family home homeowners in CNW, DOS, and RMOW but ultimately gathering input from all types of residents (i.e., non-homeowners and multi-unit building residents).

Each type of engagement method involved a similar format:

- Introduction to project goals and objectives
- Overview of project team
- Summary of engagement to date and relevant feedback
- Presentation on information related to stakeholder for which specific input is being requested
- Collection of feedback from stakeholder
- General discussion
- Outline of next steps

The primary objective of all types of engagement was to gather input into the steps necessary to implement the Concierge service: initial setup, customer experience journey map, and performance monitoring and management. In doing so, the project team were seeking to identify

opportunities from feedback and determine actions, revisit goals, and plan next steps for follow-up and future engagement.

Public engagement involved a homeowner survey. 261 homeowners from across CNW, DOS, and RMOW responded to the resident survey. Each community published similar, but not identical, surveys on their respective public participation platforms (e.g., Bang the Table). This approach was chosen as residents were understood to be already familiar with these options and the project team wanted to ensure familiarity with the survey publisher and the format so as to garner as many responses as possible. The survey was open for three weeks and advertised via the municipalities' communication channels: e-newsletter, municipal website, municipal social media, and via notifications in the local paper.

The goal of the resident survey was to understand the audience's baseline knowledge, if any, of energy retrofits and the opportunity adopting an ASHP could mean for their home and co-habitants. Research shows that motivating the majority of people to adopt low carbon behaviors is not as simple as telling them the options that are available. This will work for those who are intrinsically motivated to do so, but for many others, a more values-based approach is needed. The surveys circulated through the communities allow for consideration of how specific communities can talk about heat pumps in a locally-relevant, strategic way. By increasing understanding of technology, while connecting to local priorities, future marketing campaigns may be able to increase resident engagement in the Concierge service.

**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.

<b>Elements of a Feasibility Study</b>	<b>Page numbers from the Feasibility Study report or description of the feasibility element</b>
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.	
Potential uptake of home energy upgrades in terms of the number of anticipated projects and level of investment required	
Expected environmental, social and economic benefits that could be achieved from these projects	
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	
Evaluation of relevant financing models for your local context	
Engagement with key municipal and external stakeholders on shared goals for a local program	

**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.

<b>Elements of a Program Design Study</b>	<b>Page numbers from the Program Design report or description of the design element</b>
Target audience (e.g. housing stock, socio-economic groups, etc.)	Public report, page 10
Participant eligibility criteria	Public report, page 39
Eligible energy measures, and non-energy measures if relevant	Public report, page 10
Funding sources and budget	Public report, page 17
Recommended financing model	Public report, page 40
Financing terms and conditions	Public report, page 40
De-risking strategies (e.g. credit assessment, municipal loan loss reserve and partial loan guarantee for third-party lenders)	Public report, page 40
Program delivery model	Public report, page 43
Application of the EnerGuide Rating System and relevant requirements for program participants	Public report, page 44
Integration with other relevant incentive programs	Public report, page 35
Consumer protection measures	Public report, page 40
Marketing and communications strategies	Public report, page 29
Program implementation plan	Public report, page 44
Stakeholder roles and responsibilities	Public report, page 12
Client journey and application process	Public report, page 40
Program process flow diagrams	Public report, page 41
Program monitoring and evaluation	Public report, page 44
Risk identification and management strategies	Public report, page 43
Contracting and procurement	Public report, page 39

**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?

The City of New Westminster, District of Squamish and Resort Municipality of Whistler are preparing to implement a pilot of the program. The communities will be collaborating with Community Energy Association and Ecolighten Energy Solutions for program administration.

Beginning in 2022, CNW, DOS, and RMOW will implement a pilot of the Concierge service. Their combined targets are to fuel switch the heating/cooling system in 100 homes over the course of a year: 40 in CNW and DOS, and 20 in RMOW.

The primary barrier or challenge to this next step is the availability and capacity of experience heat pump designers and installers to complete the work. As part of other projects, all participating pilot communities have already begun contractor engagement. Access to high performance heat pump equipment will also be a challenge, the market dynamics since this project initiated just a year ago have changed dramatically. As design and implementation facilitator, CEA is participating in several initiatives targeted at manufacturers to increase supply in 2022 and beyond. Achieving sufficient program uptake is also anticipated to be a challenge but this will be mitigated through marketing campaigns to increase community engagement in the Concierge service.

## 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?

Our Study was focused on an emerging practice in B.C. – concierge services for homeowners completing a home energy efficiency retrofit. As such, we were constantly learning and evolving our understanding over the course of the Study period. Our activities and partnerships increased every week of the Study and are forecasted to do so after its completion as we shift to implementation. Each and every activity and partnership developed over the course of the Study were critical to its success, especially the final customer journey experience map. In acknowledgement of this, our key partnerships are documented on the first pages of our Final Study Report (page 2).

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

Given that the participating communities had Council support to complete the study, we faced minimal barriers or challenges with respect to garnering information from internal stakeholders. However, externally, given the marked increase in consumer interest in electric heat pumps, those stakeholders representative of that sector were trickier to engage. We overcame this by minimizing our ask of them (time, effort) and consolidating engagement to a few key touchpoints.

- 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 would recommend other municipalities reach out to our collaboration as a first step. We would be keen to share what questions we still have outstanding for further study and program design, in addition to sharing our lessons learned. We will be attempting to resolve these as part of pilot implementation but some could end up requiring more thorough analysis, i.e., how can the program be scaled up and sustain itself beyond the pilot year, how does this program design adapt to serve Multi Unit Residential Buildings operating under a Strata, or equivalent.

If we could do this Study again, we would have included more municipalities in the collaboration. Several are currently interested in the Study outcomes and we are supporting them with the initial assessment and analysis to inform their adapted program design which will be fit for purpose for their community context.

- 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 a collaboration of City of New Westminister, District of Squamish, Resort Municipality of Whistler and Community Energy Association. The project was championed by the designated representative from each organization, there is no one individual instrumental to the success of the study.

## 7. Knowledge Sharing

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

A version of the final study report will be made available at <https://www.communityenergy.ca/projects/pumping-up-savings-in-heat/>

A toolkit which includes the communications plan and implementation materials will also be made available at [www.communityenergy.ca](http://www.communityenergy.ca)

- 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.

At this time there are no materials available for public consumption beyond the Final Study Report. Consumer facing resources are under development to support the forthcoming implementation pilot. The pilot is title 'Retrofit Assist', information and resources will be available at [www.retrofitassist.ca](http://www.retrofitassist.ca) in Q2, 2022.

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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.

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