

Social Housing Retrofit Support Program for Multi-Unit Residential Buildings – Terms and conditions



PROGRAM OVERVIEW

The Social Housing Retrofit Support Program for Multi-Unit Residential Buildings (the “**Program**”) assists qualifying nonprofit housing providers (each, a “**Participant**”) to minimize operating costs and improve building performance through more efficient use of natural gas and electricity.

The Program is a collaboration between FortisBC Inc., FortisBC Energy Inc. (collectively “**FortisBC**”), BC Housing Management Commission (“**BC Housing**”), and BC Non-Profit Housing Association (collectively, the “**Program Partners**”). The program is funded and administered in whole by FortisBC. The Program Partners are subject to change.

The projects pursued under the Program may include, but are not restricted to, energy conservation measures (each an “**ECM**”) that will:

- improve building envelope performance;
- use more energy-efficient equipment or systems;
- reduce the rate of energy consumption by systems or equipment where and when possible through improved operational sequences.

ELIGIBILITY REQUIREMENTS

1. The **Participant**:

1.1. must be:

- (a) a charity registered under the *Income Tax Act (Canada)* that provides assistance to low-income persons, or
- (b) a housing provider; and

1.2. must meet one of the following criteria:

- (a) a local government;
- (b) a society, other than a “member funded society”, registered under the *Societies Act*;
- (c) an association registered under the *Cooperative Association Act*; or
- (d) a governing body of an indigenous band, provided the housing is primarily for low-income households; and

1.3. must not be:

- (a) a school board or educational institution (public and private schools, colleges and universities);
- (b) a health authority or hospital; or
- (c) public library; and

1.4. must be the registered owner of the Premises (as defined in section 2), a long-term lease holder (5+ yr. term, with min. 3 yrs. remaining) or the property manager of the Premises; and

1.5. must be a customer of FortisBC (gas and/or electric) and:

- (a) for natural gas rebates, receives natural gas service for the Premises from FortisBC Energy Inc. under any rate class except 1;
- (b) for electric rebates, receives electric service for the Premises from local municipalities within the service territories of FortisBC (electric); and

1.6. must be in good standing and have no account arrears with the Utilities with respect to the Premises at the time of payment of funding.

2. The **Building(s)** wherein the proposed ECM(s) will be implemented (“**Premises**”) must meet the following criteria:

- 2.1 must be an existing multi-unit residential building with a minimum of nine residential units and not be a single-family residence; and
- 2.2 must not be a new construction project or a major customized renovation project, as determined by the Utility in its sole discretion.

3. The **Project** being proposed must:

- 3.1 in the case of FortisBC gas customers, seek to reduce natural gas consumption for space heating, ventilation, common area water heating, cooking and/or pool heating in the Premise(s), without switching to equipment that is not powered by natural gas;
- 3.2 in the case of FortisBC electric customers, seek to reduce electrical consumption for space heating, ventilation, common area water heating, cooking and/or pool heating in the Premise(s), without switching to equipment that is not powered by electricity.

4. The **Product(s)**

4.1 The product(s) for the ECM(s) (each, a “**Product**”) must meet the following criteria:

- (a) be included in and meet all criteria found on FortisBC lists of eligible products located on the [Program website](#), which may be amended from time to time by the Utility at its sole discretion and without notice (the “**Product List**”) on the date

of purchase as shown on the proof of purchase or lease of the Product;

- (b) be new and CSA-approved or certified by a recognized accredited independent organization such as ENERGY STAR® or Design Lighting Consortium where applicable;
- (c) be installed and operated in accordance with the manufacturer's specifications and all applicable laws, orders, regulations, ordinances, standards, codes, and other rules, licenses and permits of all lawful authorities;
- (d) be installed by a qualified installer (as determined by Technical Safety BC) listed on FortisBC's list of eligible consultants located on the [Program website](#) (the “**Approved List**”); and
- (e) except for dual fuel products included in the Product List, not be installed to modify, supplement, or otherwise switch or make an existing fuel source redundant for installed equipment for which the Participant has previously received financial contribution(s) from the Utility.

4.2 For at least 10 years following installation (the “**Minimum Operating Period**”), the Product must continuously:

- (a) be operational at the Premises;
- (b) be used for its intended purpose in accordance with the application indicated on the Product List; and
- (c) not to be modified, supplemented or have its fuel source switched, augmented or made redundant.
- (d) The products replaced by ECM(s) cannot be offered for resale or re-use off the Premises.

5. The **ECM(s)** must be approved by the Utility and must be installed and operational within 12 months of the date of the Approval Notification (as defined in section 9.4).

PROGRAM OFFERINGS

6. **Energy Study**

6.1 The Energy Study component of the Program is optional. Funding is available to reimburse the Participant for the cost of the Energy Study up to a maximum of \$8,000.00.

6.2 The Energy Study aims to:

- (a) identify opportunities to reduce energy consumption in the Premises;
- (b) identify energy conservation incentive programs offered by the Utility and available to the Participant;
- (c) provide detailed costing and energy savings information to allow the Participant to make informed decisions about potential next steps to meet energy savings and financial goals; and
- (d) help prioritize ECM implementation.

6.3 The Energy Study must be conducted by a consultant hired by the Participant and who is on the [Approved List](#).

6.4 The Energy Study must be in the format and contain the specifications outlined in the Energy Study Guide provided to the Participant by the Utility.

6.5 The ECM(s) included in the Energy Study must be quantitatively analyzed using industry standard engineering techniques, tools and/or software.

6.6 Funding is subject to approval of the Energy Study report and consultant invoice by FortisBC.

7. **Implementation Support**

7.1 The Implementation Support component of the Program is optional. Funding is available to reimburse Participants for the implementation of ECM(s) up to a maximum total amount of \$11,000.00 towards the costs of retaining a consultant from the [Approved List](#) to assist in:

- (a) preparing documentation related to Program administration;
- (b) preparing specifications and undertaking tender processes for contractors and suppliers, if required;
- (c) reviewing quotes from contractors and presenting recommendations to the Participant;
- (d) identifying financing options; and
- (e) installing the approved ECM(s).

- 7.2 The Utility reserves the right to limit the number of Participants and amount paid for Implementation Support.

Product Rebates

- 7.1 Rebate amounts, eligibility conditions, timeframes/schedules and implementation requirements are set out on the [Program website](#).
- 7.2 Rebate amounts for Products cannot exceed the purchase price and installation cost, excluding tax.
- 7.3 FortisBC reserves the right to limit the number of rebates and the amount of any rebate. Rebates will be paid on a first-come, first-served basis.
- 7.4 The Program is independent of other incentives and rebates by the Utility, manufacturers, or government incentive programs or grants.
- 7.5 In addition to proof of purchase for Products, Participants may be required to provide other evidence and documentation required by, and satisfactory to, the Utility, in its sole discretion, to confirm eligibility to apply for and participate in the Program, and entitlement to receive rebates.
- 7.6 If, after the ECM installation deadline has passed, the Participant decides to proceed with any approved but unimplemented ECMs, the Participant will be required to reapply to the Program to obtain funding for such ECMs. Unless otherwise agreed by the Utility, the Participant will not be entitled to receive financial support for any additional Energy Study performed upon re-application or for Implementation Support.

PROGRAM PROCESS

- 9.1 Participants must apply to the Program through their Key Account Manager or a Program Partner.
- 9.2 If FortisBC determines the Participant meets the Program requirements, is able to implement the ECM(s), and is accepted into the Program, the Utility will issue a Program Approval Notification to the Participant setting out the scope and conditions of approval, including the approved Program components.
- 9.3 If an Energy Study is being conducted:
- (a) the Participant must submit the Energy Study to the Utility within 90 days of the date of the Program Approval Notification;
 - (b) the Participant should advise the Utility it will require Implementation Support when the Energy Study is submitted for review; and
 - (c) the Utility will review the Energy Study and notify the Participant of its acceptance, rejection or request for modifications.
- 9.4 Upon approval of the Energy Study, or, if an Energy Study will not be conducted, within 30 days, the Utility will issue a capital approval incentive notification (CAIN) to the Participant setting out the approved ECM(s), the conditions/ requirements associated with each ECM and funding/rebates (the “**Approval Notification**”).
- 9.5 No rebate will be provided to a Participant for any ECM ordered or installed prior to the issuance of the Approval Notification.
- 9.6 The amount of rebates available to the Participant will be limited to, and will not exceed, the amount identified in the Approval Notification.

REQUESTS FOR PAYMENT

- 10.1 **Energy Study.** Within 60 days of completion of the Energy Study, the Participant must submit to the Utility, (i) the Energy Study; and (ii) a detailed/itemized invoice from the consultant setting out the consultant name, address, phone number, invoice number and cost of Energy Study.
- 10.2 **Implementation Support and Product Rebates.**
- (a) Within 90 days of the ECM(s) becoming operational, the Participant will submit the following (the “**Deliverables**”):
 - (i) completed invoice reconciliation document in the form as attached to the Approval Notification;
 - (ii) copies of itemized invoices, proofs of payment and documentation detailing: consultant/contractor/vendor name, address, phone number, and invoice number; purchaser name and address where ECM(s) were installed; date of purchase, manufacturer makes(s) and model number(s) and quantities; and itemization of unit prices and costs for each ECM;
 - (iii) written Declaration of Substantial Completion by the architect, mechanical engineer and electrical engineer where applicable;
 - (iv) equipment shop drawings, installation permits, start-up reports and the results of any commissioning tests where applicable;
 - (v) inspection activity reports and final acceptances by building inspectors and/or Technical Safety BC where applicable; and

(vi) any other applicable permits.

- (b) If the Participant does not submit the Deliverables on time, the Participant may not be entitled to receive any payment under the Program. If the Participant anticipates a delay, the Participant will promptly advise the Utility in writing of the anticipated delay and the reason for the delay.

- 10.3 **Site Visits.** The Participant grants a non-exclusive license to FortisBC and its authorized employees, contractors and agents to enter upon and access the Premises at any time upon 48 hours prior notice to the Participant, including following payment, to inspect the ECM(s) and confirm they are installed, operational and otherwise in compliance with these terms and conditions.

PAYMENTS

- 11.1 Provided all the Program criteria have been met, the Utility will remit funding with respect to the Energy Study upon the Utility approving the Energy Study and the Energy Study invoice and proof of payment.
- 11.2 Upon receipt and approval of the Deliverables and, if required by the Utility, a satisfactory site visit, the Utility will pay to the Participant:
- (a) Implementation Support, if applicable;
 - (b) Product rebates.
- 11.3 Payments will be made directly to the Participant, provided that, at the request of BC Housing, payments to the Participant may be made to BC Housing as reimbursement for payments made by BC Housing as part of the Program on behalf of the Participant.
- 11.4 Except as specifically provided herein, payments cannot be assigned or transferred by the Participant.
- 11.5 The Participant is solely responsible for any tax liability imposed as a result of any rebates or funding.

REPAYMENT

- 12.1 FortisBC may, in its sole discretion, issue notice requiring the Participant to repay all or any part of funding received within 90 days if FortisBC determine, in its sole discretion:
- (a) any information provided by the Participant is incorrect or untrue, including failure to install the Product(s) or any misrepresentation as to the specifications, energy efficiency or installation particulars; or
 - (b) the Participant has failed to comply with these terms and conditions.
- 12.2 This Agreement does not preclude the Participant from applying for, soliciting or accepting grants, funding or contributions from other sources towards the energy study, implementation support or energy conservation measures, provided that if the combined total of all funding received under this Program plus from third parties exceeds 100 per cent of the cost of the energy study, implementation support or energy conservation measures, as the case may be, the Participant will, upon demand, repay the full amount of the excess to FortisBC. The Participant will immediately notify FortisBC in writing if the Participant receives contributions or contribution commitments from third parties, including the nature and extent of such contributions.

DISCLAIMERS

- 13.1 FortisBC do not, as a result of providing funding under the Program, assume any ownership interest, either in whole or in part, of any ECM(s).
- 13.2 Despite any input, information or payment made by FortisBC to the Participant, FortisBC make no representations or warranties, express or implied with respect to any ECM, including any implied warranty of merchantability, fitness for a particular purpose, design, durability or capability. It is the sole responsibility of the Participant to determine the suitability of the ECM(s) for its purposes and undertake any due diligence the Participant considers necessary and appropriate.

13.3 The Participant does hereby indemnify and save harmless the Program Partners, their affiliates, and their respective directors, officers, agents, contractors and employees, from all liability, damages, claims, demands, expenses and costs for claims, costs for injury or death of any person (including from any infectious disease outbreaks), damage to or destruction of property, and all economic loss suffered by any person (collectively, "Losses") arising from or occurring by reason of the Participant's participation in the Program and/or the implementation of any Program recommendations, including the installation and/or use of recommended products and improvements. The Participant irrevocably waives any and all claims against, and irrevocably releases and agrees not to sue, the Program Partners and any of their respective officers, directors, employees, agents, contractors or representatives for and against all Losses arising from Participant's participation in the Program and/or the implementation of any Program recommendations, including the installation and/or use of recommended products and improvements.

13.4 Any energy cost savings or other benefits described in connection with the Program are based on estimates only and actual results may differ.

13.5 The Program Partners will not be responsible for any late, lost, incomplete, illegible, misdirected, stolen, delayed, damaged, destroyed application forms, or otherwise failures or circumstances affecting, disruption or corruption of the Program.

GENERAL TERMS AND CONDITIONS

14.1 By submission of an application, the Participant agrees to all terms and conditions herein, as may be amended from time to time.

14.2 FortisBC reserves the right to refuse applications which it determine, in its sole discretion, are incomplete, inaccurate or otherwise do not meet Program requirements.

14.3 FortisBC's decisions relating to any rebate, including without limitation, inclusion of any product on the Product List, Participant eligibility and amount of the rebate, shall be final and binding and not subject to appeal.

14.4 FortisBC may at any time, at its sole discretion and without notice, amend, modify or terminate these terms and conditions, including but not limited to the availability and amount of any rebate. A completed application fully compliant with these terms and conditions received prior to a change or termination of any rebate will be administered in accordance with the Product List as it existed effective as of the date of the application. FortisBC may in its sole discretion accept applications up to, but not later than, 120 days after terminating any ECM rebate.

14.5 The Participant acknowledges that FortisBC is a "public utility" as defined in the *Utilities Commission Act* (British Columbia), and further acknowledges and agrees that payment of rebates is subject to the approval of the British Columbia Utilities Commission ("BCUC") on terms satisfactory to the Utility, acting in its sole discretion. If BCUC withdraws approval or changes the terms and conditions of such approval either with respect to the Program or energy efficiency funding generally, on terms and conditions not satisfactory to the Utility, in its sole discretion, the Utility may amend and/or terminate the Program, including the availability and amount of any rebate, and the Utility shall be under no obligation to pay any rebate to the Participant.

14.6 The Program Partners do not endorse any particular consultant, manufacturer, ECM, system, design, contractor, supplier or installer. It is the sole responsibility of the Participant to the suitability of the foregoing for its purposes and undertake any due diligence the Participant considers necessary and appropriate.

BRANDING OPPORTUNITIES

15.1 The Participant will acknowledge FortisBC, as appropriate and applicable, and subject to prior approval of the applicable FortisBC, in any media, advertising, publications and other communication materials created by or for the Participant with respect to the ECM(s).

15.2 The Program Partners may publicly identify the Participant, the Premises, and its features and equipment as participating in the Program for the purpose of promoting the Program, soliciting additional participants, and advertising Program effectiveness, unless the Participant, acting reasonably, informs the Program Partners, in writing, through the Utility, that such information is to remain confidential.

15.3 The Participant will accurately represent the nature of its participation in the Program to the public and to any government authorities.

15.4 The Participant will not use the trademarks or logos of any FortisBC or Program Partner without their express written consent.

CONSENT TO USE AND DISCLOSURE OF INFORMATION

16.1 The Participant acknowledges, consents and agrees:

- (a) the Program Partners may contact the Participant to administer, verify compliance with, and evaluate the program, and to obtain information and conduct surveys;
- (b) the Program Partners may collect and use information (including personal information as defined in the *Personal Information Protection Act*), whether provided by the Participant, obtained during site visits, through enquiries, contained in, or forming part of, any documents submitted as part of the Program or generated by the Program Partners as part of the Participant's participation in the program, and disclose the information to employees, affiliates, contractors, representatives, agents, facilitators, initiators, FortisBC and program partners, to verify eligibility, calculate incentives, process, manage, administer, audit, evaluate and report on the Program, the funding amounts and the Participant's participation, to monitor, audit and assess compliance with these terms and conditions, and to develop other energy conservation programs;
- (c) the Utility may retrieve account data, including billing, energy use and consumption, for a period of **five years** prior to, and **five years** after, the Product installation dates to evaluate consumption behavior and energy savings attributable to the Program, and to collect, use and disclose such account data pursuant to (b) above.

16.2 Program Partners collect, use, and disclose personal information in accordance with the following:

- (a) FortisBC - Personal Information Protection Act and FortisBC's Privacy Policy (available at fortisbc.com/privacy).
- (b) BC Housing - Freedom of Information and Protection of Privacy Act. For more information, contact: FIPPA@bchousing.org.
- (c) BC Non-Profit Housing Association – Personal Information Protection Act and BCNPHA's Privacy Policy (available at <https://bcnpha.ca/privacy-policy/>).