UBC Sustainability Revolving Fund:

Proposal Template

# How your proposal will be evaluated

Key criteria for approval of project funding are:

### Contribution to UBC’s sustainability goals and consistency with UBC’s strategic plan, [Place and Promise](http://strategicplan.ubc.ca/)

* Will result in resource savings that achieve a payback period of approximately two to five years
* Loan principal of $10,000 to $200,000
* Acceptable risk (technical risk and achievement of savings)
* Verifiable savings
* Additionality (i.e., the project would not proceed without the loan)

Project approval will also be subject to funding availability. Please submit your proposal to [sust.rev.fund@ubc.ca](mailto:sust.rev.fund@ubc.ca) **by January 9, 2015**.

# Project Information

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Date of application** | Click Here | | | |
| **Project Name and Location** | Click Here | | | |
| Project Lead and Department  (UBC Faculty or Staff member) | Click Here | | | |
| Short Project Description | Click Here | | | |
|  | | | | |
| Project Types | Check all that apply | | | Choose Sub-Category |
|  | Lighting | |  | Choose an item. |
|  | Renewables and Alternate Energy | |  | Choose an item. |
|  | Metering/Energy Data Monitoring and Control Systems | |  | Choose an item. |
|  | Electrical systems | |  | Choose an item. |
|  | Building Heating, Ventilation, Air Conditioning (HVAC) | |  | Choose an item. |
|  | Central power heating Plant | |  | Choose an item. |
|  | Information Technology | |  | Choose an item. |
|  | Building Envelope | |  | Choose an item. |
|  | Equipment and Appliances | |  | Choose an item. |
|  | Water | |  | Choose an item. |
|  | Waste | |  | Choose an item. |
|  | Transportation | |  | Choose an item. |
|  | Materials Procurement and Food Sourcing | |  | Choose an item. |
|  | Other | |  | Choose an item. |
|  | | | | |
| Proposed Loan Amount  (between $10,000 and $200,000) | Click Here | | | |
|  | | | | |
| Implementation Timeline | Time required to complete project implementation after receipt of loan | Click Here | | |
|  | Project Lifespan (Years)  (i.e., lifespan of systems/equipment being implemented) | Click Here | | |

|  |  |  |  |
| --- | --- | --- | --- |
| Project Contact Names | | | |
| **First** | **Last** | Email | Position Title |
| Click Here | Click Here | Click Here | Click Here |
| Role on Project | | Notes | |
| Click Here | | Click Here | |
| Institution/Department | |
| Click Here | |
|  |  |  |  |
| **First** | **Last** | Email | Position Title |
| Click Here | Click Here | Click Here | Click Here |
| Role on Project | | Notes | |
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| **First** | **Last** | Email | Position Title |
| Click Here | Click Here | Click Here | Click Here |
| Role on Project | | Notes | |
| Click Here | | Click Here | |
| Institution/Department | |
| Click Here | |

# Project Objectives and Outcomes

|  |  |
| --- | --- |
| Summarize the project’s objectives and expected outcomes. Include any relevant background information (attach if necessary) | Click Here |

# Contribution to UBC

|  |  |
| --- | --- |
| Summarize how the project supports UBC’s sustainability goals. (Resource & cost savings will be estimated later in the proposal). | Click Here |
| Describe any benefits to academic research and learning on campus. | Click Here |
| In addition to resource savings identified, identify any environmental, health and safety benefits or impacts. | Click Here |
| Describe any contributions to other areas of UBC not covered above. | Click Here |

# Strategic Partnerships

|  |  |
| --- | --- |
| Identify any government or other organizations involved and if appropriate describe how partnering adds value or leverages existing programs and services at UBC or other organizations. | Click Here |

# Project Work Plan and Budget

Complete the following summary table, showing the major components or phases of work, approximate target timelines, who is proposed to implement the work, cost, and how the costs were derived (based on firm quotes, estimates, client or other forecasts, etc). Ensure that you have planned for any required design and engineering work, as well as testing and commissioning. Attach any supporting cost estimates and studies.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Phase No. | Description | Timeline to Complete (weeks from start) | Who is Implementing | Cost | How Cost Determined |
| 1 | Click Here | Click Here | Click Here | Click Here | Click Here |
| 2 | Click Here | Click Here | Click Here | Click Here | Click Here |
| 3 | Click Here | Click Here | Click Here | Click Here | Click Here |
| 4 | Click Here | Click Here | Click Here | Click Here | Click Here |
| Total | Click Here | Click Here | Click Here | Click Here | Click Here |

## Project Completion Indicators

|  |  |
| --- | --- |
| Indicate how you will demonstrate that the project is complete and has met the stated objections e.g. event held, reports produced, etc.  Are there any announcements, publications, special considerations or communication opportunities once the project is complete? | Click Here |

# Technical Information

In the following table, identify and describe the systems, equipment and technology to be installed as part of the project. Classify the risk factors for each, according to these criteria:

**Technical risk:** this indicates how proven the systems and technology are in that application, and includes both risk of failure and risk of not achieving projected savings. E.g., proven technology and savings means similar systems have been implemented and proven in projects at UBC or elsewhere under similar conditions.

**Persistence risk:** this reflects the likelihood that the savings will continue to be achieved. For a low risk, a project is not likely to be changed or bypassed by the owner or user during the savings period. This is best achieved when overall performance from a user or client perspective is similar or better than pre-project status quo, so there is no incentive to “undo” or defeat the measure. For example, a new lamp that can be easily changed out by users who may not like the quality of light would have a high risk.

|  |  |  |  |
| --- | --- | --- | --- |
| System Type/Technology Proposed | Model (where appropriate) | Technical Risk Factor (1=low risk) | Persistence Risk Factor (1=low risk) |
| Click Here | Click Here | Choose an item. | Choose an item. |
| Click Here | Click Here | Choose an item. | Choose an item. |
| Click Here | Click Here | Choose an item. | Choose an item. |
| Click Here | Click Here | Choose an item. | Choose an item. |
| Supporting information: Provide additional explanatory notes as needed. Attach any supporting information such as equipment specification sheets, feasibility studies, case studies, etc. as appropriate. |  | | |

### Risk Mitigation

|  |  |
| --- | --- |
| Identify any other risks associated with the project, and describe how project risks will be mitigated. Risk examples include cost overruns, overly optimistic savings, unclear implementation roles and responsibilities. | Click Here |

# Financial Information

## Funding Sources and Financial Capacity

|  |  |
| --- | --- |
| Describe how the department plans to fund the project and the management capability to successfully implement the project. | Click Here |

Complete the following table, indicating the contributions from other funding sources, and the status of those sources.

|  |  |  |
| --- | --- | --- |
| Funding Source | Amount | Status |
| UBC Sustainability Revolving Fund | Click Here | Pending |
| Click Here | Click Here | Choose an item. |
| Click Here | Click Here | Choose an item. |
| Click Here | Click Here | Choose an item. |
| Total Project Cost: | Click Here |  |

### Additionality

|  |  |
| --- | --- |
| Can the project proceed without the loan? Explain why funding is required. Indicate if the project would proceed or how it would change if these funds are not successfully obtained. | Click Here |

### Ongoing Costs

|  |  |
| --- | --- |
| Identify any ongoing costs following project completion, such as maintenance, and how those will be funded. | Click Here |

## Savings and Payback

Complete the following table or attach a excel spread sheet, illustrating the types, amounts and dollar value of resource savings that will be achieved as a result of project implementation, and calculation of the simple payback. Also include costs of any resources/ongoing costs that are increased.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Resource | Unit Type (e.g., kWh, m3, etc) | Projected Annual Savings (No. of Units) | Cost per unit ($) | Net Savings ($/year) | Department Accruing Savings and Repaying Loan (e.g., your department or UBC Energy & Water Services) |
| Choose an item. | Click Here | Click Here | Click Here | Click Here | Click Here |
| Choose an item. | Click Here | Click Here | Click Here | Click Here | Click Here |
| Choose an item. | Click Here | Click Here | Click Here | Click Here | Click Here |
| Total Savings ($/year) | | | | Click Here |  |
| Simple Payback (years) | | | | Click Here |  |

## Project Measurement & Verification Plan

Savings must have some level of verification, with annual submissions required to confirm savings. Where the savings accrue to the applicant and not to a separate department such as UBC Energy & Water Services, the applicant is taking on the risk of achieving the savings in order to finance the loan repayment, so verification submission requirements will be less stringent.

When another department (typically Energy & Water Services) is accruing savings and therefore repaying the loan, verification requirements will be more stringent and the project must demonstrate a high level of verifiability.

In this section, describe how the savings will be verified and/or measured. Identify how the baseline (pre-project) resource usage and costs are determined. Depending on the type of technology or equipment used, different methods are possible and appropriate. The following table provides some guidance.

|  |  |
| --- | --- |
| M&V Method | Verifiability and Applicability |
| **Measured**: based on sub-meters tracking | **Highest**: best for higher risk projects and technologies |
| **Extrapolated calculation**: based on smaller savings sample |  |
| **Estimated**: Based on prediction of resource use reduction | **Lowest**: may be appropriate for low risk, low cost projects with proven technology |

|  |  |
| --- | --- |
| Measurement and Verification (M&V) Method | Choose an item |
| Describe the M&V method in detail. Identify and attach any supporting documentation. | Click Here |

M&V plans should include quarterly or annual field reviews to verify continuing operation of the installed systems. 3rd party reporting may also be used.