GREEN MUNICIPAL FUND

FONDS MUNICIPAL VERT

GMF Funding Application Guide

Net-zero Transformation

Updated: January 2024

Table of Contents

HOW TO USE THIS GUIDE

This guide outlines everything you should know about applying for GMF funding under the *Net-zero Transformation offer*. It contains application instructions, information about how your project will be evaluated and tips for completing a great application.

Follow the directions below as you complete your pre-application and full application form. Answer each question with enough detail so that someone who has never heard of your project would fully understand your application.

The appendices at the end of this document contain useful information:

- Appendix A: Glossary of key terms
- Appendix B: Funding offer
- Appendix C: Evaluation of application
- Appendix D: Required supporting documents
- Appendix E: Reporting requirements
- Appendix F: Climate resilience requirements

IMPORTANT: If you are applying for project funding, you will first need to create a profile on FCM's funding portal. Once you've completed your profile, use this guide to help you prepare and submit your application.

Please review our webpage prior to reading the application guide. Our webpages provide essential information about the funding offer, project eligibility and required project outcomes. This application guide will navigate you towards submitting a complete application

GMF respects the principles of OCAP®. Any product, data or information that may include Indigenous knowledge may be submitted at the discretion of the applicant.[1]

If you're having trouble completing the application or uploading files, or if you simply have questions, give us a call at 1-877-417-0550 or email us at **gmfinfo@fcm.ca**.

---

[1] The principles of ownership, control, access and possession—more commonly known as OCAP®—assert that Indigenous communities have control over data collection processes, and that they own and control how this information can be used.

WHEN TO APPLY

We accept applications year-round until all annual funds are allocated. Once all funding is allocated for the year, any new applications are deferred for approval to the following fiscal year, beginning April 1. If your application is deferred, we will let you know.

APPLICATION PROCESS

To apply for GMF funding, you must submit:

- a pre-application form
- a full application form
- a project workbook
- all required supporting documents[2]

Below is a high-level overview of the sequence and steps to reaching a funding decision. In Phases 1 and 2 a GMF outreach officer or advisor will support you to prepare a strong pre-application. They will then review your pre-application and provide you with extra feedback if needed to complete a high-quality full application form. Once you submit a full application form in Phase 3, a project officer will be assigned to your file and will be your point of contact throughout the remainder of the application and funding decision process. They will review your file and provide feedback. They may ask you to revisit some steps to help you improve your application and make it stronger before it is sent to our peer reviewers and final review by our Green Municipal Fund Council.

Phase 1: Pre-application submission[3]

You must submit a pre-application form through FCM's funding portal. To do this, create a client profile and follow the steps in the portal to submit your pre-application form.

> **Note:** You can save your progress at any time; click "save" at the bottom of page and return to the form later to complete it.

Phase 2: Eligibility determination
A GMF outreach officer or advisor will review your pre-application form. They will

---

[2] Required documents are to be submitted as attachments to your pre-application and full application forms.

[3] A reminder: If you are a municipality or municipal corporation from Quebec, all pre-applications must be submitted and approved by Ministère des Affaires municipales et de l'Habitation (MAMH). Please review the steps on how to apply on our webpage.

determine whether your organization and initiative are eligible to proceed to the next stage of the application process. You will receive a response within 21 business days of the date we receive your pre-application form.

Phase 3: Full application submission

If your organization and initiative are determined to be eligible to proceed to the next stage, your GMF outreach officer or advisor will inform you that the full application form is available through FCM's funding portal. They will also provide you with an Excel project workbook template to complete and submit with the full application form.

It is important to note that even if a project is deemed eligible to move forward with a full application, it does not guarantee full application eligibility or that the project will be approved for funding.

Note: Review this guide for a preview of the questions and required documentation on the pre-application and full application forms. Use the guidance provided to ensure you answer every question fully and to the best of your ability. Consult Appendix D: Required supporting documents.

As you complete the application form, contact your GMF outreach officer or advisor if you have any questions. Once you've filled out the application form and project workbook and you've attached the required supporting documents, submit them to GMF through the FCM funding portal.

Phase 4: GMF project officer review

Once the full application form is submitted, a GMF project officer will be assigned to your file and will review your application for accuracy and completeness. They will work with you to resolve any remaining questions.

Phase 5: Peer review and internal review

An external expert peer review panel evaluates all capital project and feasibility study funding applications. There will also be an internal analysis to provide a funding recommendation to GMF's managing director, the GMF Council and FCM's Board of Directors.

Phase 6: FCM funding decision

For **feasibility studies,** funding decisions are determined by GMF's managing director. The average time for a funding decision is three to five months after submission of your full application form.

For **capital projects**, FCM's Board of Directors approves the funding recommendation made by the GMF Council. The average time for a funding decision is four to six months after submission of your full application form.

STEP 1: VERIFY PROJECT ELIGIBILITY

Before you apply, please review the eligibility requirements on our [webpage](#) and confirm that your project will meet all funding eligibility requirements, outcomes and targets.

If you are unsure whether your project aligns with the funding offer, or if you have questions about how to apply, please contact a GMF representative at gmfinfo@fcm.ca or 1-877-417-0550.

STEP 2: SUBMIT A PRE-APPLICATION

All applicants must complete a pre-application form through [FCM's funding portal](#). The instructions in this step will guide you in answering the questions on the pre-application form.

The information you provide in your pre-application will help GMF staff members assess whether your initiative aligns with the requirements of the funding offer and determine its eligibility to proceed to the next phase of the application.

Answer each question with enough detail so that someone who has never heard of your project would fully understand your application.

Applicant information

On this page, we will ask you to tell us who you are, where you are from and who your main partners are, if any.

Participating organization

Applicable to all applications

In this section, please provide the name and role of each participating organization. Use the guidance in the following table to help you complete this section.

Application category	Required supporting information
Organization name [type to select from list]	You must use the full legal name of the organization.

Organization role [select value]	In the funding portal, you will select from the following options in a drop-down menu:
	• **Lead applicant:** the municipality, or a partner organization, that signs the agreement with FCM, oversees the initiative (even if a third party completes the work), incurs the costs of the initiative and submits the required reporting to FCM (please provide the contact information for the individual authorized to act on behalf of the lead applicant) • **Lead municipality:** the primary municipal partner to a non-municipal lead applicant (see **lead applicant** category above); usually the municipality where the initiative is taking place or that will benefit from the initiative • **Lead applicant and municipality:** if the lead applicant is a municipality, this is the appropriate selection • **Partner:** if the organization is not the lead applicant or the lead municipality, this is the appropriate selection (e.g., projects with multiple municipal partners, any non-municipal funders, consultants, etc.)

IMPORTANT: If your organization is *not* a municipal government, your initiative must be delivered in partnership with one. You will be required to provide the name of the main project contact for your lead municipality on the project team. You will also be required to submit a municipal council resolution stating municipal partnership. See Appendix D: Required supporting documents for requirements for non-municipal applicants.

Project contacts

Applicable to all applications

In this section, please provide contact details for the lead project contact(s). Be sure to include their primary role in the project and their affiliated organization. Use the guidance in the following table to help you complete this section.

Application category	Required supporting information
Organization name [select from list]	You will only be permitted to select the name of the organizations you listed under the participating organization in the earlier question.
Contact name [open text]	Please enter first and last name.
Contact role [select value]	In the funding portal, you will select from several options in a drop-down menu. One of the contacts you provide must be the **application contact**. This is the primary contact for the application and the person that will be permitted to submit the application.

If you wish to provide additional contacts, we recommend you select one from the following list:

- **Secondary contact:** the secondary point of contact supporting the submission of the application
- **Municipal contact:** contacts representing the municipality if not already identified as an application contact or secondary contact
- **Consultant:** the primary contact representing the consulting team, if applicable
- **Read-only:** a contact that is permitted to view the application; they will not be permitted to make any changes to the application directly

IMPORTANT: Contacts listed in this section will have access to edit and/or view the application, but the form can only be submitted by the **application contact**. We strongly recommend that you designate only one application contact who will be responsible for completing the full application process and receiving all related FCM correspondence.

Supporting document(s)

There is a supporting documents box for each section of the pre-application form where you can attach the documents related to the questions in that section.

Required attachments for applicant information:

- For all non-municipal **lead applicants**, a council resolution stating the municipality's involvement in the project must be attached.

Project information

On this page, please provide:

- an overview and description of the project
- information pertaining to the objectives and rationale of the project
- a high-level budget for the project

Note: When possible, in your application please refer to specific page numbers or sections in your supporting documents. This will ensure staff and peer reviewers evaluate your application accurately.

Project overview

Applicable to all applications

In this section, please provide the title of your project as well as the funding offer and project type for which you are applying. Use the guidance in the following table to help you complete this section.

Application category	Required supporting information
Project working title [open text]	The title should include, at a minimum: • the name of the municipality or, in the case of multiple municipalities, the region • description of what the project is with at least one keyword based on the project *Example: Studying emission reduction opportunities targeting net zero performance at four municipal facilities in Bonville, Quebec*
Offer type [select value]	Select the type of funding offer you are applying to from the following list of options: • Community Energy Systems • Sustainable Municipal Buildings • Organic Waste-to-Energy • Municipal Fleet Electrification • Net-zero Transformation For this particular offer, please select: *Net-zero Transformation*
Project type [select value]	Select the type of project you intend to complete from the following list of options: • Plan • Pilot project • Feasibility study • Capital project

IMPORTANT: There are unique full application forms for each funding offer and project type. This means you must select the correct categories for your project. Please refer to the descriptions of each eligible initiative on our webpage for additional guidance. If you are unsure, please get in touch with a GMF representative at gmfinfo@fcm.ca or 1-877-417-0550.

Project description

Applicable to all applications

In this section, please provide a description of your project that covers the information requested in the table below. The information you provide in this section will help GMF assess eligibility and compliance with the required outcomes of the funding offer. Use the guidance in the following table to help you complete this section.

Project type	Required questions to answer
All applications	• briefly describe the community or region in which your initiative will take place. • describe the scope of your initiative, including the key activities and deliverables that it will include.
Plans	Describe how your plan: • uses an integrated planning approach (i.e., a collaborative process that integrates the work of various disciplines working alongside each other, developing a plan that achieves multi-disciplinary objectives) • will include an operationalization strategy that identifies plan implementation requirements (e.g., projected capital and operational funding needs, alternative engineering standards)
Feasibility studies	• what solutions are being explored as part of this study? • what key questions will the feasibility study aim to answer? • what methodology will be used to assess the practicality and viability of the solution(s) explored? • what qualitative or quantitative potential impacts and benefits of the solution(s) will this study assess? • how will the GHG impact of the solution(s) be assessed? • how will you assess potential impacts on equity-deserving groups in your project?
Pilot projects	• what new technologies, approaches or solutions are being piloted?
Capital projects	• what new technologies, approaches or solutions are being used?

Note: GMF understands that for some applicants (especially smaller municipalities) the scope of work for business cases and feasibility studies may be contingent on third-party support that is secured after funding approval from GMF. If you have not selected a consultant at the pre-application stage, please answer the questions to the best of your knowledge, indicating where further detail will be contingent on this support.

Objectives and rationale

Applicable to all applications

For this section, please tell us why you want to complete this project and what you hope to achieve. Use the guidance in the following table to help you complete this section.

Project type	Required questions to answer
All applications	- describe the purpose of your initiative and the problem(s) or need(s) it addresses. - explain why the project is important and timely. - at a high level, what are the anticipated environmental, socio-economic and financial benefits of your initiative? How will this project improve your community? Use quantitative information where possible. - what would "business as usual" (most likely scenario) be in the absence of the solution(s) you are exploring or implementing?
Pilot projects	- why are you piloting this initiative instead of proceeding with a full-scale implementation? - what hypotheses or assumptions will you be testing? - describe how your project will be used to assess the viability, effectiveness and scalability of a solution or approach ahead of a full-scale rollout. - briefly describe what a full-scale implementation might look like if the project is successful.

Budget

In this section, please provide the following budgetary information about your project. Use the guidance in the following table to help you complete this section.

Application category	Required supporting information
Project start and end date (YYYY-MM-DD) [date field]	Indicate the start and end dates for your proposed initiative.
Funding request ($) [open text]	Indicate the amount of funding you are requesting for your proposed initiative.
Anticipated total project costs ($) [open text]	Provide the total costs of your proposed initiative.

Supporting document(s)

Required attachments for project information:

For capital and pilot projects, you will need to provide the following additional information:

- complete feasibility study* (for capital projects)
- a feasibility study or equivalent that supports the initiative and provides quantified GHG benefits from the eventual full-scale project implementation (for pilots)
- engineering or detailed cost estimate
- executive summary of the environmental assessment of your initiative, if required under federal and/or provincial laws
- audited financial statements for the past three years (non-municipal applicants)

*This study consists of an assessment of the technical and financial feasibility, as well as the environmental, social, and economic impacts of a potential municipal environmental project. Your feasibility study must compare the expected environmental performance of the project against a baseline, to demonstrate the anticipated environmental results. GMF considers that a strong feasibility study will contain the following:

- models that support the expected environmental performance
- analysis of the recommended option from a life cycle perspective (e.g., construction, operation, renewal and end of life)
- financial or business case for the recommended option
- methodology that will be used to measure the actual results/project performance

Project eligibility

On this page, we will ask you to provide key details about your project that will enable us to confirm its eligibility.

Project site

Applicable to capital project applications

In this section, please answer the following question indicating whether you are including brownfield remediation as part of your project scope of work.

Question: Does your project budget include brownfield remediation costs? [select value]
- Yes

- No

Capital projects that involve the remediation of a <u>brownfield</u> site are eligible to receive a grant of up to 20 percent of the loan amount (instead of 15 percent). This extra grant amount is only available to projects that include remediation in their project workplan and budget. It does not apply when:

- remediation or site closure has already occurred
- contamination is discovered during the project

To be eligible for the extra grant, applicants must be able to attest that:
- a Phase II environmental site assessment (or equivalent) has confirmed that contamination is present at the project site and that remediation is required

Innovation

Applicable to all applications

In this section, please answer the following question about the innovative aspects of your initiative.

Question: Please describe the innovative aspects of your initiative.

[open text]

A project is considered innovative when it delivers performance improvement over best practice through at least one of the following:

- development or application of new knowledge, policy, practice, business model or advanced technology (level 7 or above on the Government of Canada's technology readiness scale)
- new or emerging application of an existing technology or practice (e.g., in a new context) in a manner that represents a substantive change to current operating conditions or performance

For this question, please describe how your project demonstrates a high level of innovation by explaining how it:

- improves (or could improve) performance over other options or best practice
- applies new knowledge, policy, practice, business model or technology; or applies existing practices in new ways

Climate resilience

Applicable to pilot and capital project applications with new infrastructure assets (not applicable to retrofits or vehicles)

In this section, please answer the following questions indicating whether you meet the requirements related to climate resilience. You will need to confirm whether your new infrastructure project site is outside the current 100-year floodplain and whether your project involves new infrastructure assets valued at over $2 million.

> **Question:** According to the most recent floodplain map available, is your project site outside the current 100-year floodplain? [select value]
>
> - Yes
> - No
> - Not applicable (for projects without new infrastructure assets)

If your project does not involve new infrastructure assets (i.e., retrofits) or if it only includes mobile assets (i.e., vehicles and charging stations), please select "Not applicable".

> **Question:** Does your project involve new infrastructure assets valued over $2 million? [select value]
>
> - Yes
> - No

If your project involves new infrastructure assets valued *under* $2 million, you are required to provide one of the following:

- For projects located outside the 100-year floodplain map or located behind a permanent structural defense, please use the letter of attestation for flood exposure template (either from the lead applicant or supporting experts).
- For projects located within the 100-year floodplain map, a guarantee signed by a professional engineer that the asset is built to a flood-resilient design is required.

> **Note:** You are not required to attach a floodplain map as part of your pre-application and full application.

Projects involving new infrastructure assets valued *over* $2 million must submit a completed climate risk assessment[4] with documentation detailing design considerations to mitigate vulnerabilities where high levels of flood, wildfire or permafrost degradation risks exist.

---

[4] Infrastructure Canada Climate lens, ISO 14091, PIEVC High Level Screening Guide or equivalent

Please consult Appendix F: Climate resilience requirements for detailed guidance on how to meet this requirement.

Greenhouse gas (GHG) reduction benefits

In this section, please answer the following questions to explain the environmental benefit of your initiative with respect to reducing GHG emissions.

Applications for **feasibility studies and plans** will be asked the following question and assessed on their potential *to lead to* initiatives resulting in reductions in GHG emissions in alignment with net zero.

Question: Please describe how this project will contribute to a reduction in GHG emissions.

[open text]

Please describe how your project will lead to GHG reductions through one or more of the following measures:

- changes in energy consumption
- changes in energy sources
- changes in renewable energy production
- changes in resource consumption
- changes in waste generated or diverted from landfill
- carbon storage or sequestration
- methane capture
- changes in other sources of GHG emissions

Applications for **capital and pilot projects** will complete the table below and be assessed on their potential to result in GHG emission reductions in comparison to similar projects.

Project data on GHG emissions	Information available?	Name of supporting document(s)	Comments and reference pages
Baseline GHG emissions prior to project implementation	[select a value] • Yes • No	[open text]	[open text]
Anticipated GHG emissions after project completion	[select a value] • Yes • No	[open text]	[open text]

If you have received guidance from GMF staff on answering this question, please follow the instructions you have been provided. If not, please complete the table to enable GMF to assess how your project will lead to GHG reductions through one or more of the following measures:

- changes in energy or fuel consumption
- changes in energy sources
- changes in renewable energy production
- changes in resource consumption
- changes in waste generated
- carbon storage or sequestration
- methane capture
- changes in other sources of GHG emissions

Examples of indicators used to the calculate GHG emissions could include but are not limited to the following:

- amount of waste from operations diverted (reused or recycled)
- reduction in vehicle fuel consumed
- reduction in energy consumption
- on-site renewable energy generation

Supporting document(s)

Required attachments for project eligibility:

- For **all capital and pilot projects**, you will need to provide any documents you referenced in the table above
- For **capital and pilot projects** with new infrastructure valued *over* $2 million, you will need to provide a completed climate risk assessment
- For **capital and pilot projects** with new infrastructure valued *under* $2 million, you will need to provide one of the following:
  - a signed letter of attestation if your project is located outside the 100-year floodplain map or located behind a permanent structural defense
  - a guarantee signed by a professional engineer that the asset is built to a flood-resilient design if your project is within the 100-year floodplain map

Optional attachments for project eligibility: If available, please provide any documentation demonstrating the innovative aspects of your initiative.

Declaration and signature

In the declaration and signature section, simply type the information of the person with signing authority from the lead applicant organization.

Note: Only the Application Contact can submit the pre-application form. The Application Contact must ensure they have permission to submit the application on behalf of their organization. Consultants working with a lead applicant to prepare this application cannot sign this declaration or submit this form.

STEP 3: SUBMIT A FULL APPLICATION

If your project is deemed to be eligible based on the information you provided in the pre-application form, your GMF outreach officer or advisor will inform you that the full application form is available through [FCM's funding portal](). They will also provide you with an Excel project workbook template to complete and submit.

As you complete the application form, contact your outreach officer or advisor if you have any questions. Once you've verified the information in your application form, project workbook and required supporting documents, submit them to GMF through the funding portal.

Note: Answers you provided during the pre-application stage will be pre-populated in the full application form. However, you will need to re-attach any supporting documents to the full application form. You will be able to edit and update some of the information pre-populated from your pre-application form.

Reminder: You can save your progress at any time; click "save" at the bottom of page and return to the form later to complete it.

Applicant information

Applicable to all applications

Please review the pre-populated information and add any additional details that would help us to better understand your initiative. Guidance on how to answer these questions is provided in the pre-application guidance Applicant information section on page 5.

Supporting document(s)

Re-attach all support documents submitted at pre-application (please see page 11 of the guide). In addition, for capital and pilot projects, municipal applicants will need to provide the following information:

- audited financial statements for the past three years (non-municipal applicants)

Project information

Applicable to all applications

Please review the pre-populated information and add any additional details that would help us better understand your initiative. Guidance on how to answer these questions are provided in the pre-application guidance under the Project information section on page 7, as well as under the Project site section for capital projects on page 11.

Innovation

Applicable to all applications

Please review the pre-populated information and add any additional details that would help us to better understand your initiative. Guidance on how to answer these questions is provided in the pre-application guidance under the Innovation section on page 12.

Supporting document(s)

Optional attachments for innovation: If available, please provide any documentation demonstrating the innovative aspects of your initiative.

Project management and delivery

On this page, we want to better understand your project management approach, including appropriate planning, risk management, stakeholder engagement and resourcing.

Project team

Applicable to all applications

In this section, please answer the following question describing your project team. In the table, please identify members of your project team (including your project partners, if applicable) and their roles in the project.

Question: Please describe in the table below the roles and responsibilities of your project team.

[fillable table]

Name	Title	Organization	Scope of responsibilities
[open text]	[open text]	[open text]	[open text]

The table should include at least one member of the lead applicant's project management team, as well as anyone responsible for training and capacity building to ensure the successful completion of your initiative. If your project is sponsored or championed by a municipal elected official, include them as well.

If you have not yet hired a key team member, please identify them in the table anyway (e.g., "consultant TBD") and detail their *anticipated* roles and responsibilities along with their *required* level of experience and expertise (e.g., as defined in your request for proposal).

Applications will be assessed based on the project team and its ability to lead the project to completion and deliver the expected benefits. The assessment will also consider whether there is strong municipal staff participation and capacity building throughout the project that will enable municipal staff and, where applicable, rights holders and stakeholders, to build and retain the skills and knowledge needed to undertake and replicate the project.

Project implementation risk

Applicable to capital project applications

In this section, please answer the following question describing the biggest risks and challenges you face in implementing your project and how you will manage and mitigate them. In the table, please identify relevant implementation risks and challenges along with risk mitigation measures or strategies to address them.

> **Question:** Please list in the table below the biggest risks and challenges you face in implementing this project, and how you will manage/mitigate them.
>
> [fillable table]

Risk description	Mitigation measures
[open text]	[open text]

Applications will be evaluated on their risk management plan and mitigation strategies. Reviewers will assess the project's understanding and adoption of risk management strategies with appropriate mitigation of potential risks to the project's execution, including:

- environmental risks
- stakeholder/resident engagement risks
- social risks
- financial risks
- technical risks
- operational risks
- planning risks
- time and cost-related risks

Examples of risk mitigation activities may include managing regulatory requirements (e.g., environmental assessments, certificates of authorization and regulatory approvals), assessment of expected new technology performance and back-up plans in case of problems, construction or installation of engineering controls and monitoring systems, preparation of a performance measurement plan and a cost-overrun and capping plan, and liability insurance and performance guarantees.

Supporting document(s)

Required attachments for project management and delivery: You will need to provide the following additional information in the full application:

- organizational chart (i.e., an organigramme) that shows the reporting structure of the project team, including the reporting relationship between municipal staff and any consultants
- project team members' resumés or documents listing their professional qualifications and experience as they relate to this project (note: please provide detailed resumés or descriptions of experience for lead members of the project team; short descriptions of experience are sufficient for other team members)

Optional attachments for project management and delivery: If available, please provide a project risk management plan in the full application.

Budget and workplan

The information you provided at the pre-application stage has been carried over to this part of the full application form. Please review and update it if necessary.

Budget

Applicable to all applications

Before completing this section, please complete the project workbook provided to you by your outreach officer or advisor.

Please see the Supporting document(s) section on page 21 for guidance on completing your project workbook. We also encourage you to consult Appendix E: Reporting requirements to ensure that your project's budget includes sufficient resources to meet these reporting requirements.

Please review the information in the application form that was carried over from the pre-application form. Ensure that the values for the funding request and the anticipated total project costs are the same as those in your project workbook. Then use the guidance in the following table to complete this section.

Application category	Required supporting information
Project start and end date (YYYY-MM-DD) [date field]	Please review and update your project dates if necessary. These dates can be approximate. Please note that, for most projects, dates are flexible and can be adjusted.
Funding request ($) [open text]	Please review this amount and update it if necessary. You will obtain this information from your completed project workbook. Once you have completed the budget and sources of funding

	tabs in the project workbook, you will be provided with the maximum loan and grant amounts you can request based on your total eligible project costs. Once you have reviewed and confirmed the amounts in Tab 5 – Sources of funding, please enter it here.
Anticipated total project costs ($) [open text]	Please review and update these if necessary. This value should align with the total project costs identified in your project workbook.

Applications will be assessed on the merits of the project budget and workplan. Budgets should be realistic and reflect the proposed workplan. Workplans should have concrete deliverables in accordance with established project milestones. They should have realistic timelines and consider elements such as permitting processes, regulatory approvals, data collection, project monitoring and performance verification approaches.

Budgets and workplans will be evaluated relative to industry standards for size, scope and location of projects.

Note: Project costs incurred prior to the date GMF receives your full application form are ineligible unless they are relating to writing your GMF application up to 90 days before submitting it (up to $5,000). For capital projects, additional costs can be incurred for completing required assessments relevant to a GMF application, provided the assessment is completed within 90 days of submitting the application (up to $25,000).

Supporting document(s)

Required attachments for budget and workplan: As part of your GMF application, your GMF outreach officer or advisor will provide you with a customized project workbook to fill out. Your project workbook is a critical supporting document for all GMF funding applications. It will be used for approved projects to create the funding agreement and for project monitoring. Please be sure to carefully read and follow the instructions provided in the project workbook.

The project workbook contains the following tabs:

Tab 1 – Instructions: This tab explains how to complete the project workbook. Read the tab carefully and make note of the important tips to consider when filling out the remaining tabs.

Tab 2 – Environmental benefits (capital and pilot projects only): This tab is pre-populated by GMF based on the information provided in your pre-application form. Review the table and reach out to your GMF outreach officer or advisor if you have any questions.

Tab 3 – Eligible and ineligible costs: This tab provides a breakdown of cost categories, describing elements that are considered ineligible and eligible costs. Review it carefully as it will inform the tasks you enter into Tab 4.

You can also review the full list of eligible costs for plans, studies pilots and capital projects.

Tab 4 – Project budget and milestones: This tab is where you will enter your project costs based on milestones and tasks. Please, follow the detailed instructions provided in the project workbook.

Note that milestones are set at the full application stage, confirmed at the agreement stage for approved projects, and monitored throughout the implementation stage to inform the timing of reporting and disbursement.

For guidance on GMF reporting requirements to better inform your budget, please review Appendix E: Reporting requirements.

Tab 5 – Sources of funding: This tab is where you will enter all funding sources for this initiative. Follow the detailed instructions provided in the project workbook. If possible, please include confirmation letters for all confirmed funding sources. It is not a requirement to have all funding sources confirmed prior to submitting your application, but all sources of funding must be confirmed before the first disbursement if your application is approved for funding.

Measurement and monitoring

Applicable to pilot project applications

On this page, please answer the following questions describing your plan(s) to measure and monitor the impact and benefits arising from your pilot project. Be sure to clearly explain how you will assess the GHG benefits achieved. We're also asking you to articulate the decision-making process you will use to determine whether to move forward with full-scale implementation.

Question: Please describe your plan(s) to measure and monitor the impact and benefits arising from this initiative.

[open text]

Question: Please describe the decision-making process you will use to determine whether to move forward with full-scale implementation.

[open text]

Applications will be evaluated on whether you have done the following:

- defined clear objectives, success criteria and key performance indicators (KPIs) for the pilot project
- established the necessary mechanisms for data collection and analysis
- determined the post-pilot evaluation process that will inform the decision to proceed with full-scale implementation or not
- laid out steps for internal and external knowledge sharing

Supporting document(s)

Optional attachments for measurement and monitoring: If available, please provide a measurement and monitoring plan for your initiative.

Engagement strategy

Applicable to all applications

In this section, we are asking you to describe the engagement plan for your project. If an engagement strategy has already been created for the project, please include it as an attachment.

Please describe the extent to which you have identified and engaged (for pilot and capital projects) and/or plan to engage (for all projects) relevant stakeholders and rights holders for successful project planning, design, execution and operations. For example, these might include operations staff, staff from other relevant departments, council, regulators, agencies, Indigenous groups, citizens' groups and not-for-profit organizations.

Where appropriate, GMF strongly emphasizes actively building broad public support with the community, as well as inclusive, accessible, and authentic engagement and representation of equity-deserving groups.

Question: Please describe in the table below the engagement plan for your project.

[fillable table]

Stakeholder or rights holder, including equity-deserving groups	Level of engagement	Description
Group A	[select a value]*	[open text]

	• inform • consult • involve • collaborate • empower	
Group B	[select a value]* • inform • consult • involve • collaborate • empower	[open text]
Group C	[select a value]* • inform • consult • involve • collaborate • empower	[open text]

*In cases where one activity serves several purposes, select the *highest* degree of engagement the activity serves (e.g., consult rather than inform).

For each group identified, select the level of engagement among these five categories from IAP2's Spectrum of Public Participation:

- **Inform:** The group will be/has been provided with balanced and objective information to assist them in understanding the problem, alternatives and/or solutions.
- **Consult:** The group will provide/has provided feedback on analysis, alternatives and/or decisions.
- **Involve:** You will work/have worked directly with the group throughout the process to ensure that their concerns and aspirations are consistently understood and considered.
- **Collaborate:** You will partner/have partnered with the group in each aspect of the decision, including the development of alternatives and the identification of the preferred solution.
- **Empower:** This group will have/has had final decision-making power.

Next, please describe any inclusive engagement practices that were or will be implemented for your project. Inclusive community engagement entails identifying and engaging with equity-deserving groups or vulnerable populations that have an interest in the project, reducing barriers to participation, empowering diverse groups with decision-making, and building relationships and connections through meaningful engagement.

> **Question:** Please describe inclusive engagement practices that were or will be implemented for your project.

Examples of inclusive community engagement practices include, but are not limited to the following:

- identifying and addressing potential barriers to participation by equity-deserving groups (personal resources, motivation and attitude, cultural factors, etc.)
- making changes to the project based on feedback received from community engagement activities
- using multiple methods of communication to help reach diverse groups in the community
- reviewing communication materials for improved accessibility (e.g., written clearly in a style like plain language, translated into the languages spoken in the community, formatted with high-contrast colours, accessible fonts, alt text for visuals, etc.)

Supporting document(s)

Optional attachments for engagement strategy:

- if available, please provide an engagement strategy/plan that describes your engagement approach in greater detail.

Climate resilience

Applicable to pilot and capital project applications

The information you provided in your pre-application form will be pre-populated on this page. You'll be able to revise this section or include additional information if required. Guidance on how to answer these questions was provided in the Climate resilience section on page 13. Additional information can also be found in Appendix F: Climate resilience requirements.

Supporting document(s)

We remind you that you'll need to provide the following additional information in the full application form:

- For **capital and pilot projects** with new infrastructure valued *over* $2 million you will need to provide a completed climate risk assessment
- For **capital and pilot projects** with new infrastructure valued *under* $2 million you will need to provide one of the following:

- a signed <u>letter of attestation for flood exposure</u> if your project is located outside the 100-year floodplain map or located behind a permanent structural defense
- a guarantee signed by a professional engineer that the asset is built to a flood resilient design if your project is within the 100-year floodplain map

Environmental benefits

GMF seeks to fund the very best examples of municipal innovation that achieves a multitude of benefits for the environment, communities and local economies. Higher application evaluation scores are given to projects that demonstrate excellence in the multi-solving areas described below.

GHG reduction benefits

Applicable to all applications

This section will be pre-populated with the information you provided in your pre-application form. Revising this section or including additional information if required will still be possible. Guidance on how to answer these questions was provided in the <u>GHG reduction benefits</u> section on page 14.

Water conservation

Applicable to all applications involving real property. If your project does not involve real property, you may enter "N/A".

In this section, please answer the following question describing your project's potential to minimize the use of potable water by using water-efficient components, landscaping, and water harvesting and recycling systems.

> **Question:** Please tell us about the measures that will be studied or implemented as part of this project that will help to reduce potable water consumption. If possible, provide the forecasted water conservation benefits that would result directly from your project, should it be successful.
>
> [open text]

A project will be assessed based on whether it is likely to achieve at least one of the following:

- It reduces the use of potable water at an existing building/facility/site through structural (non-behavioural) changes (e.g., zero-irrigation landscaping, rainwater or greywater systems that offset potable water demand).
- It results in a new building/facility that will have a lower demand for potable water than standard new buildings/facilities of that type.

Sustainable materials management

Applicable to all applications

In this section, please answer the following question describing your integration of best practices to improve the circularity of materials through planning and design, optimal use, and/or value recovery and regeneration.

> **Question:** Please tell us about the measures that will be studied or implemented as part of this project that will improve circularity of materials and reduce embodied carbon.
>
> [open text]

Your project will also be assessed on its potential to reduce the embodied emissions of materials (i.e., the carbon emissions released during materials' life cycles, including extraction, manufacturing, transport, construction and disposal).

Biodiversity and ecological functions

Applicable to all applications involving real property. If your project does not involve real property, you may enter N/A.

In this section, please answer the following question explaining how your project will impact (if at all) the following types of environmentally-sensitive land:

- farmland
- floodplains
- habitat for threatened or endangered species
- forests
- wetlands
- grasslands
- peatlands

> **Question:** Please tell us about the measures that will be studied or implemented as part of this project that will maintain or enhance site biodiversity and ecological functions.

Please also describe how your project will maintain and enhance, or at least reduce adverse effects on, the site's and the surrounding area's biodiversity and ecological functions.

Examples of measures to minimize harm to biodiversity and ecological functions include but are not limited to the following:

- protecting existing ecological features from damage during site preparation, construction and operations (e.g., establishing significant buffer zones, maintaining existing tree canopy)
- eliminating the use of wood from threatened tree species
- maintaining wildlife corridors
- controlling for invasive species
- eliminating the use of pesticides and fertilizers

Examples of enhancement measures include but are not limited to the following:

- restoring or enhancing the ecological value of the site (e.g., habitat creation, stream daylighting)
- integrating ecosystem services into project design (e.g., using green infrastructure for stormwater management, shading)
- taking measures to foster biodiversity (e.g., creating wildlife corridors, planting diverse native vegetation, creating pollinator gardens)

Other environmental benefits

Applicable to all applications

In this section, describe how your project will generate any additional environmental benefits beyond those described in the previous sections. Examples could include the following:

- improving air, soil and water quality
- exceeding regulatory requirements
- reducing environmental nuisances such as artificial light and noise

Projects will be assessed based on the significance of the other environmental benefits they will generate.

Question: Please tell us about other environmental benefits that would result directly from your project, should it be successful.

Supporting document(s)

Required attachments for environmental benefits:

- For capital projects and pilot projects, you will need to provide or update any documents you referenced in your pre-application form to demonstrate the GHG benefits of your initiative. Refer to page 14 for details.

Optional attachments for environmental benefits:

If available, please provide the following documents as part of your full application form:

- any documentation demonstrating other environmental benefits
- an embodied carbon analysis

Socio-economic benefits

On this page, your project will be assessed on its socio-economic outcomes. These will be assessed through two main indicators:

- implementation of social procurement
- integration of principles of anti-racism, equity, inclusion and/or reconciliation.

Your project will also be assessed on its potential to generate and fairly distribute the following:

- social benefits (e.g., improved accessibility, public health, safety and/or security; more equitable access to services, opportunities and public spaces; reduced noise or smell)
- economic benefits (e.g., creation of quality jobs; application of social procurement criteria; fair community wealth-building where economic opportunities are prioritized for members of equity-deserving communities)

You can find more detailed definitions and examples of socio-economic benefits in Appendix A: Glossary of key terms.

Social procurement

Applicable to all applications

In this section, please answer the following questions about social procurement, which is a framework or set of guidelines established by an organization to direct its

procurement practices in a way that goes beyond traditional cost and quality considerations.

Question: Does your organization have a social procurement policy? [select a value]

- Yes
- We have a social procurement framework or guidelines
- We are currently developing a social procurement policy
- We are interested in developing a social procurement policy
- Unsure what social procurement is
- No

Question: Please describe how your project will include social value and/or sustainability considerations in its procurement practices (e.g., specific criteria in competitive procurement bids, reporting on social or sustainable value outcomes).

[open text]

Socio-economic benefits

Applicable to pilots and capital project applications

In this section, please answer the following question(s) describing your project's potential to result in improved socio-economic outcomes and a more equitable distribution of benefits and burdens in the community, for present and future generations.

Question: In the table below, please select and describe other socio-economic benefits your project will generate. Only select outcomes that you will implement or measure. [fillable table]

Suggested benefits include: [select value]

- accessibility (physical elements or accessibility measures)
- improved outdoor spaces
- inclusive employment and apprenticeship
- other socio-economic benefits

Suggested socio-economic benefits	Description
	[open text]

Anti-racism, equity, inclusion, and Reconciliation

Applicable to all applications

In this section, please answer the following question describing the inclusive, fair and equitable principles that have guided the development of your project.

For plans and feasibility studies, please mention the socio-economic benefits your project will generate and fairly distribute. You can refer to the list of benefits above.

Question: Please describe how this project integrates principles of anti-racism, equity, inclusion and/or Reconciliation.

[open text]

GMF is particularly interested in the application of an equity lens to projects. Applying an equity lens on an infrastructure project involves systematically analyzing and addressing potential disparities and inequities that may arise throughout the project's life cycle. It requires considering the diverse needs, experiences and voices of all stakeholders and rights holders, particularly those who have historically been marginalized or underserved. An equity lens approach would also aim to identify and rectify any existing or potential biases, discrimination or exclusionary practices in project planning, design, funding, construction and operation.

For feasibility studies: Please note that, you will need to answer a few questions as part of your project study to better understand how equity-deserving groups may be impacted by your project. These include:

- Which equity-deserving groups might benefit the most from the project, and/or be burdened, directly or indirectly, by the project or decision? How are these groups positively or negatively impacted by the project or decision?
- What strategies can be used to address barriers or mitigate negative impacts?
- What data sources, reports or mapping resources can help illuminate equity issues in your local context?

Supporting document(s)

Optional attachments for socio-economic benefits:

- If available, please provide your organization's social procurement policy, framework or guidelines
- If available, please provide your organization＇s equity lens policy, framework or guidelines

Financial analysis

Applicable to capital project applications

On this page, we are asking you to describe the financial analysis conducted for your capital project, including:

- capital and operational costs
- revenues and/or cost savings
- comparative analysis (versus baseline or alternative solutions)
- economic indicators (e.g., return on investment, net present value, payback period)

> **Question:** Please describe the financial analysis your municipality has conducted for your project.
>
> [open text]

Capital projects will be assessed on their potential to improve municipal finances and sustainability either directly (e.g., through capital and operating-cost savings) or indirectly (e.g., through the extension of asset life).

However, not all projects have the potential to result in net cost savings or new revenue sources for a municipality. Where appropriate, projects will be assessed on whether they have a strong financial business case compared to alternatives (e.g., better value for money in terms of economic, environmental and social benefits compared to the most likely scenario in the absence of the project).

Our assessment of the financial analysis will also consider whether the applicant has used appropriate baselines/alternatives, based them on valid and conservative assumptions, and considered the full cost (e.g., the total cost of ownership).

Supporting document(s)

Optional attachments for financial analysis

If available, please provide the following optional supporting attachments:

- financial analysis
- financial model

- cost–benefit analysis

Declaration and signature

In the declaration and signature section, simply type out the information for the person with signing authority from the lead applicant organization (i.e., the person who will sign the application if it is successful).

Reminder: Only the application contact can submit the full-application form. The application contact must ensure they have permission to submit the application on behalf of their organization. Consultants working with a lead applicant to prepare this application cannot sign this declaration or submit this form.

Once the application is complete, please verify that you have gathered and attached all supporting documents to your form, which are listed in Appendix D: Required supporting documents. Follow the instructions in the next part of this guide to submit your application and required documents.

HOW TO SUBMIT YOUR APPLICATION

Organize your supporting documents

Before submitting your application, please check the list of required supporting documents for your project type in Appendix D: Required supporting documents.

Ready to submit?

Once you have verified the information on your application form and in your project workbook and required supporting documents, you can submit everything to GMF through the FCM funding portal.

Ensuring that your submission is complete with all supporting documents will shorten processing time. Here are some tips for completing the submission process:

- The portal will let you know if all sections of the form have been properly completed and you have uploaded the required supporting documents. You will not be able to submit your application until all the required information has been provided.
- If you are not able to submit, make sure you have answered all the questions in the application form. If the form is properly filled in, check that the project

workbook is complete and has been uploaded as a supporting document in the budget section.

- When everything is ready, you will see that the submit button is available, which means you can now submit your application.

Remember, don't hesitate to contact your GMF outreach officer or advisor if you have any questions before submitting.

After submission, a GMF Project Officer will review your application for accuracy and completeness. They will work with you to resolve any remaining questions.

Need help, or have suggestions to improve this guide?

If you are having trouble completing the application or uploading files, or if have any questions or suggestions for us, we want to hear from you. Please give us a call at 1-877-417-0550 or email us at gmfinfo@fcm.ca.

APPENDIX A: GLOSSARY OF KEY TERMS

Absolute energy targets: This is a target set to reduce energy consumption by a certain amount. The target applies to buildings and is contextual to their location in Canada. The further north the building is, the more lenient the target is, due to increased heating degree days.

Accessibility: In the context of GMF-funded projects accessibility is centred on both tangible and intangible improvements. Tangible improvements to accessibility could look like retrofitting existing infrastructure or implementing physical elements in new infrastructure to aid people living with disabilities or mobility issues. Intangible improvements could look like implementing measures for greater access to services for people living with disabilities, such as sensory-friendly quiet hours or flexible scheduling and service delivery.

> Example: The City of Victoriaville's new pool has an "obstacle-free path." This is an accessible pathway free of obstructions and barriers, making it easily navigable for individuals with disabilities or limited mobility. The pool's main entrance is at ground level and there are automatic sliding doors. The reception desk has a lowered section, the sink counters are at an inclusive height for everyone, and there are three fully accessible changing rooms— men's, women's and family—each with a bathroom with an adapted shower. Finally, visually and audibly tactile location (VATL) stickers are accepted, ensuring free entry for an accompanying person.

Baseline year: This is a year with the most recent 12 months of consecutive and reliable data that represents a typical year of facility operations without any significant changes. The first month of the baseline year must be no more than five years prior to your full application submission date.

Biodiversity: Short for biological diversity, biodiversity refers to the variability among living organisms, including diversity within species, between species and of ecosystems. Biodiversity is crucial for maintaining ecological balance, sustaining ecosystems and providing numerous benefits to humans through ecosystem services (e.g., pollination, purification of water and air).

Brownfield: A brownfield is an abandoned, vacant, derelict or underutilized commercial, institutional or industrial property where past actions have resulted in actual or perceived contamination or a threat to public health and safety, and where there is active potential for redevelopment.

Circularity: A circular system is one in which materials never become waste and nature is regenerated. In a circular system, waste is designed out of products and services, and materials are kept in circulation through processes like maintenance, reuse, refurbishment, remanufacture, recycling and composting.

Commissioning: This is the process of ensuring that systems are designed, installed, functionally tested, and capable of being operated and maintained according to the owner's operational performance goals.

Ecological functions: Ecological functions are contributions made by various organisms and components of an ecosystem to the overall health, structure and functioning of that ecosystem. They can include a range of processes, such as erosion control, water purification, climate regulation or habitat provision.

Electric vehicle supply equipment (EVSE): An EVSE is an electric vehicle charging or hydrogen refuelling station.

Embodied carbon: Embodied carbon refers to the greenhouse gas emissions released during the extraction, manufacturing and transportation of materials, as well as the construction and end-of-life phases of buildings and other infrastructure. It does not include operational emissions. Embodied carbon is frequently measured in kilograms or tonnes of equivalent carbon dioxide ($kgCO_2e$ or tCO_2e).

Energy conservation measure (ECM): An ECM is an upgrade to a building component or the installation of energy-saving equipment, with the primary goal of saving energy.

Energy model: A computer-generated calculation which estimates energy savings for one or more ECMs. An energy model is completed by an energy efficiency expert, typically after an energy audit.

Energy use intensity (EUI) targets: These are performance requirements for building energy consumed per year per unit area (square metre) for each retrofit or new construction typology (with adjustments for buildings that do not fit office/multi-unit residential typologies).

Equity-deserving groups: This phrase refers to Indigenous persons, newcomers to Canada, non-binary persons, persons living with disabilities, racialized persons, and women.

- **Indigenous persons** – First Nations, Métis, Inuit people and communities, including urban Indigenous communities
- **Newcomers to Canada** – Self-identified; including but not limited to people who have obtained a landed immigrant status, refugee status or permanent resident status up to five years prior to a given census year.
- **Non-binary persons** – Persons whose gender identity does not align with a binary understanding of gender such as "man" or "woman."
- **Persons living with disabilities** – A person with a long-term or recurring physical, mental, psychiatric, intellectual or sensory impairment that, in interaction with various attitudinal and environmental barriers, hinders their full and effective participation in society on an equal basis with others. This is a self-identified characteristic and does not require an external or formal recognition of disability.

- **Racialized persons** – A person or group of people categorized according to ethnic or racial characteristics and subjected to discrimination on that basis.
- **Women** – All people who identify as women, whether they are cisgender or transgender.

Equity lens: Applying an equity lens on a project involves systematically analyzing and addressing potential disparities and inequities that may arise throughout the project's life cycle. It requires considering the diverse needs, experiences and voices of all stakeholders and rights holders, particularly those who have been historically marginalized or underserved. An equity lens approach would also aim to identify and rectify any existing or potential biases, discrimination or exclusionary practices in project planning, design, funding, construction and/or operation.

Fugitive emissions: These result from intentional or unintentional releases of emissions. They could include equipment leaks from joints, seals, packing and gaskets; methane emissions from venting or distribution of fossil fuels; or emissions from the use of refrigerants.

Greenhouse gas (GHG) emissions: The release of gases that trap heat into the atmosphere like carbon dioxide (CO_2), methane (CH_4) and nitrous oxide (N_2O). Because these gases trap heat in the atmosphere, they are called "greenhouse gases." Common sources of emissions include combustion, anaerobic digestion and fugitive emissions (e.g., leaks). GHG emissions are usually expressed in terms of equivalent tonnes of carbon dioxide (tCO2e). Using less energy can cut down on GHG emissions.

Improved outdoor spaces: Improvements to outdoor spaces can be a powerful way to improve community benefits and positively contribute to quality of life for residents. Better outdoor environments; improved public health; safer streets and safer mobility experiences; and enhanced access to water, hygiene and sanitation facilities all serve important social outcomes such as gender equality, good health and well-being, and sustainable communities. Improvements to outdoor spaces could include the following:

- physical elements, either new or renovated (e.g., parks, playgrounds, benches, fruit or nut trees, native plants, art installations, changing and feeding rooms, new public restrooms, renovations to historic buildings, etc.)
- intangible elements (e.g., programs, activities, or cultural, educational and/or recreational opportunities)
- improved safety and security (e.g., new or improved lighting fixtures, pedestrian safety barriers, bollards, smart technologies, safety-related data analytics, etc.)

Inclusive employment and apprenticeship: Employment as a community benefit helps to ensure that infrastructure projects improve the lives of people in the community through inclusive hiring and training. This typically consists of decent-paying job and apprenticeship opportunities for residents and equity-deserving

groups. Inclusive employment and training develop the local workforce while improving economic security and inclusion for diverse community groups. Note that this indicator requires monitoring of the number of employees hired who belong to one or more equity-deserving group(s), or monitoring the number of hours worked by employees who belong to one or more equity-deserving group(s) throughout the construction phase of the pilot or capital project.

> Example: "Comox Valley Regional District (population: 66,500) obtained funding from a federal grant that included Infrastructure Canada's Community Employment Benefits Program. The project was completed on time and on budget. The final community employment benefit hours far exceeded the original committed totals. Employment hours for Indigenous Peoples and apprenticeships more than doubled, and employment hours for under-represented populations ended up being more than four times the original commitment. There were no additional cost implications associated with the social procurement concepts that were included in the RFP." (Source: Buy Social Canada)

Internal combustion engine (ICE): An ICE is a heat engine that generates power from the combustion of a fuel, generally gasoline or diesel.

Meaningful engagement: This is an intentional process with the purpose of working in inclusive and respectful ways with all stakeholders and rights holders to shape decisions, actions, impacts or change.

Net-zero: This means eliminating operational and embodied GHG emissions, bringing them as close to zero as possible, and reabsorbing the equivalent of any remaining emissions.

Principles of anti-racism, equity, inclusion and/or Reconciliation: Inclusive, fair and equitable principles that guide the development of a project.

> Example: In June 2021 the Urban Sustainability Directors' Network published in June 2021 _Equity and Buildings: A Practical Framework for Local Government Decision Makers._ Here are a few of the 12 principles of practice presented in that framework:
>
> - make impacted communities, which are continuing to lead equity and building work nationwide, central to planning and projects
> - understand the people ("the who) of buildings, how communities interact with the built environment, and what their priorities are
> - collaborate across departments and disciplines to produce policies and programs that better address equity issues
> - shift funding and financing structures to directly support increased capacity in impacted communities
> - share data and information transparently

Real property: Real property refers to land and any permanent improvements attached to the land, such as buildings, structures and fixtures. It encompasses physical assets that are immovable and permanently affixed to the land.

Rights holders: In Canada, Indigenous peoples have constitutionally protected rights. This means there is a duty to consult Indigenous peoples or rights holders in Canada (e.g., in resource development projects).

Social procurement: Social and sustainable procurement is a strategic approach that organizations use to purchase goods and services while considering their broader social and community impact. The primary goal of social procurement is to leverage procurement practices to generate more positive social, economic and environmental outcomes in a community or region. Social procurement can be an important element of fair and equitable local economic development.

A social procurement policy is a framework or set of guidelines established by an organization to direct its procurement practices in a way that goes beyond traditional cost and quality considerations. For example, a policy might define the organization's commitment to specific socio-economic objectives, such as promoting purchasing from small or local businesses, social-purpose businesses and diverse businesses (i.e., businesses that are majority-owned by members of an equity-deserving group).

> Example: The Town of Gibsons, B.C. (population: 4,758) has a purchasing policy that clearly states that "the Town is committed to developing and maintaining a procurement culture that leverages procurement activities to deliver best value to the community and support social value objectives." Criteria are specific to the nature of the procurement and, where applicable, are clearly stated in the procurement documents to include environmental and socially responsible options or criteria to be considered along with price and performance.
>
> Some of the town's procurement principles are to value and support:
>
> - supply chain partners who provide a living wage
> - the diversification and social impact of the supply chain by including social enterprises, First Nations suppliers and local small enterprises
> - suppliers providing work experience and employment opportunities to local youth
> - enhanced relationships and engagement with Skwxwú7mesh (Squamish) and shíshálh (Sechelt) Nations

Stakeholders: A stakeholder can be an individual or group concerned about a particular issue and/or who holds legal or de facto rights to manage or make decisions.

Thermal energy use intensity (TEDI): TEDI is the annual heating energy demand for space conditioning and conditioning of ventilation air. This includes all types of heating equipment and is measured per unit of modelled floor area.

Zero-emissions vehicle (ZEV): A ZEV is a vehicle that has the potential to produce no tailpipe emissions. It can still have a conventional internal combustion engine but must also be able to operate without using it. We consider the following to be ZEVs: battery-electric, plug-in hybrid electric, and hydrogen fuel cell vehicles.

APPENDIX B: FUNDING OFFER

We support projects at various stages of development through grants and loans. These include **plans, feasibility studies**, **pilot projects** and **capital projects**. Wherever you are in your project, we can help you find the right starting point to help you reach your environmental, economic and social goals.

The table below presents our funding overview. Funding amounts are based on total eligible costs for each stage. Further details on eligible costs are provided on the webpage.

Offer type	Funding details
Plans	• grant for up to 50%* of eligible costs • up to a maximum of $200,000
Feasibility studies	• grant for up to 50%* of eligible costs • up to a maximum of $200,000
Pilot projects	• grants for up to 50%* of eligible costs • up to a maximum of $500,000
Capital projects	• combined grant and loan of up to 80% of eligible costs • loan of up to a maximum of $10 million • grant of 15% of GMF loan; grant proportion will increase to 20% if project involves remediation of a brownfield site

*Note: Plans, studies, and pilot projects can be funded at 80 percent of total eligible project costs for:

- communities with a population under 10,000
- northern communities
- eligible Indigenous communities

First-time northern or Indigenous communities may receive grants for up to 100 percent of total eligible costs for plans, studies or pilots.

Contact us to learn about conditions.

APPENDIX C: EVALUATION OF APPLICATIONS

An external expert peer review panel will evaluate capital project, pilot, study and plan applications. There will also be an internal analysis to provide a funding recommendation to GMF's managing director, the GMF Council and FCM's Board of Directors.

GMF will evaluate your project using the following criteria:

Transformative potential scoring (Part I)				
	Plans	*Studies*	*Pilots*	*Capital projects*
Innovation	20%	20%	20%	20%
Replication potential[5]	15%	15%	15%	15%
Transformative potential total	**35%**	**35%**	**35%**	**35%**
Impact scoring (Part II)				
GHG reduction total	**30%**	**30%**	**30%**	**30%**
Multi-solving: Environmental benefits[6]				
Water conservation[7]	5%	5%	5%	5%
Sustainable materials management	5%	5%	5%	5%
Biodiversity and ecological benefits[8]	5%	5%	5%	5%
Other environmental benefits	5%	5%	5%	5%

---

[5] A project is considered replicable when it demonstrates the following characteristics:
- It has clear performance benefits, which can be demonstrated through commonly understood metrics and measures.
- The solution addresses a key challenge for many municipalities (i.e., it is need-to-have, not nice-to-have).
- There are strong drivers for the adoption of the solution (e.g., cost savings over other options, financial returns, etc.)

[6] The weighting of the "Multi-solving: Environmental benefits" criteria will depend upon the number of criteria that are applicable to your project. Five percent is the minimum weighting that would be given to any of these criteria.

[7] This only applies to projects involving real property.

[8] This only applies to projects involving real property.

Environmental benefits total	20%	20%	20%	20%
Multi-solving: Other benefits				
Socio-economic benefits	5%	7.5%	7.5%	5%
Engagement strategy	10%	7.5%	7.5%	5%
Financial analysis	N/A	N/A	N/A	5%
Other benefits total	15%	15%	15%	15%
Implementation scoring (Part III)				
Teams and partners	pass/fail	pass/fail	pass/fail	pass/fail
Workplan	pass/fail	pass/fail	pass/fail	pass/fail
Budget	pass/fail	pass/fail	pass/fail	pass/fail
Risk management	N/A	N/A	N/A	pass/fail
Measuring and monitoring	N/A	N/A	pass/fail	N/A

APPENDIX D: REQUIRED SUPPORTING DOCUMENTS

Throughout the application process, we'll be asking you to include supporting documents with important information about your organization and the details of the proposed project. Required documents will differ depending on the type of project and whether your organization is a municipal government or a partner of a municipal government.

The table below lists the mandatory documents along with the requirements and conditions your organization must fulfil before you can apply to GMF.

Additional supporting documentation may be requested. You are also welcome to provide further evidence as it becomes available.

Note: When possible, in your application please refer to specific page numbers or sections in your supporting documents. This will ensure staff and peer reviewers evaluate your application accurately.

Application category	Required supporting documents
All applications	- completed application form - project workbook - letters from confirmed sources of funding **Note:** You are not required to have all sources of funding confirmed prior to the submission of your application. However, funding that is confirmed must be supported with a letter using the template attached - evidence of municipal support (e.g., council resolution describing your organizational commitment to, and financial support for, the project and funding application to GMF) - project team organizational chart and resumés
Pilot project and capital project applications	- completed feasibility study or equivalent* - executive summary of the environmental assessment of your initiative, if required under federal and/or provincial laws - a signed letter of attestation for flood exposure if your project involves new infrastructure valued under $2M and is located outside the 100-year floodplain map or located behind a permanent structural defense - a guarantee signed by a professional engineer that the asset is built to a flood resilient design if your project involves new infrastructure

	valued under $2M and is within the 100-year floodplain map • a completed climate risk assessment for projects involving new infrastructure valued at over $2 million Note: a letter of confirmation of consultation with your province or territory may be requested

Capital project applications	• audited financial statements for the past three years
	• engineering or detailed cost estimate
	• **New Brunswick municipalities** (other than the City of Saint John): evidence that you have obtained the New Brunswick Municipal Capital Borrowing Board᾽s authorization to borrow funds
	• **Nova Scotia municipalities:** evidence that you have obtained authorization from the Minister of Service Nova Scotia and Municipal Relations to borrow funds
	• **Quebec municipalities:** evidence that you have obtained the règlement d᾽emprunt issued by the Ministère des affaires municipales et de l᾽habitation
	• **Local boards of municipal governments:** c
	• **Non-municipal applicants:**
	  o business plan and project proforma (if applicable)
	  o letters, patent, bylaws, and any applicable operating and shareholders᾽ agreements.
	  o Detailed information about the entity᾽s ownership structure, including any related entities
	• **Eligible Indigenous community**
	  o letters of incorporation
	  o governance documentation (e.g., bylaws)
	  o First Nation agreements

Projects that include the remediation of a brownfield site	• phase II environmental site assessments (or equivalent) of the site • remedial action plan or risk management plan (or equivalent) for the site
Municipally-owned corporations	• evidence of your organization᾽s relationship to, and mandate from, the lead municipality in relation to the proposed project, including your organization᾽s articles of incorporation or your shareholder agreement with the lead municipality

Non-municipal applicants (municipal partners)	• municipal council resolution stating municipal partnership on the project confirmation of organizational support from CEO or CFO • articles of incorporation including all supporting documentation
Eligible Indigenous communities	If eligible through partnership with a municipality: • municipal council resolution stating municipal partnership If eligible through shared service agreement: • shared service agreement with a Canadian municipality related to municipal infrastructure, climate change or adaptation

APPENDIX E: REPORTING REQUIREMENTS

If you are approved for funding, you will be required to submit project reports to GMF. The purpose of these reports is to confirm that your project is progressing as planned or to inform GMF of any unforeseen changes. The reports are also meant to share your community's experience in undertaking the initiative with others seeking to address similar issues in their communities.

The project reports include a series of questions relating to the key stakeholders involved in the project, the methodology and approach used, your findings and recommendations, the next steps in the project, and lessons learned from the project. Project reports are typically in the range of five to ten pages but may be longer depending on the complexity of the project.

Before submitting your application, it is important to consider all required reporting documents for project completion and disbursement. Please ensure that your project workbook includes sufficient budgetary accommodations for all final reporting needs. This includes but is not limited to sufficient staff time and consulting services.

More so, GMF reserves the right to reduce, amend or eliminate funding amounts if projects deviate from the approved scope of work. Therefore, please review and confirm that your application meets all required outcomes as indicated on our webpage.

The table below lists the reporting documents your organization must fulfill after project approval and when requesting a disbursement.

Application category	Required reporting documents
All applications	- project progress report[9]* - project completion report[10]* - updated project workbook that includes: - an expense claim - all confirmed sources of funding - request for disbursement
Plans	complete plan
Feasibility studies	complete feasibility study
Pilot projects and capital projects	triple bottom line report[11] based on one year of operation after project completion that consist of:

---

[9] Only applicable for multiple disbursements or upon request from GMF staff.
[10] Only applicable at final loan disbursement or at final grant contribution.
[11] It could be part of your eligible costs if budgeted in the project workbook.

	- o a summary of the environmental benefits of the project and a description of the lessons learned from the operation of the project - o reporting actual results of environmental benefits listed in your project workbook. There will be no penalty if the project does not achieve the anticipated environmental performance, provided that the project was implemented as described in the application - o reporting of any socio-economic benefits described in the application
Capital project	- financial audit (external) of all eligible costs incurred for the purpose of the project - legal opinion (external or internal) attesting to a legal review of the loan and grant agreement and any other documents or records deemed necessary or appropriate for a legal opinion - document, prepared by a qualified professional (e.g., engineer, architect) confirming that the project was substantially performed[12] - proof of project signage recognizing FCM-GMF support (during and after implementation) - photos of completed project

Note: The list above only highlights GMF reporting requirements. There may be additional provincial requirements to borrow funds.

---

[12] The project is substantially performed when it is ready for use or is being used for the purposes intended.

APPENDIX F: CLIMATE RESILIENCE REQUIREMENTS

Climate resilience refers to how well something withstands, and how quickly it recovers from, natural hazards made worse by climate change. To ensure that projects supported by GMF stand the test of time, new infrastructure assets should be planned, designed, built and operated to account for the climate changes that may occur over their lifetimes. This means taking into consideration vulnerability factors such as the proposed location of an asset and, where appropriate, a more detailed assessment of potential risks to ensure that infrastructure placement and design do not jeopardize the asset's performance in a changing climate.

To ensure that GMF-funded capital projects are situated and designed to provide environmental and community benefits throughout their designed lifespan, resilience baseline requirements will be applied to infrastructure funding that results in the construction/installation of a new infrastructure asset. Note that this requirement does not apply to retrofit projects.

New infrastructure assets under $2 million

Projects must demonstrate that new infrastructure assets are not at high risk of damage by flooding, Canada's most common and expensive natural hazard. Infrastructure should be located outside the 100-year floodplain identified in the most recently available hazard map unless evidence is provided demonstrating the asset's resilience to flooding impacts. This can come in the form of internal or external structural protections or designs that lower exposure to flood hazards, or from project characteristics or designs that allow for the minimization of damage and a rapid return to service.

A signed letter of attestation for flood exposure from the applicant or its supporting experts is sufficient to satisfy the requirement that an asset will not be located within the 100-year floodplain.

If the asset will be located within the 100-year floodplain or a letter of attestation cannot be provided ensuring it is located outside the 100-year floodplain, an engineer's signature will be required attesting that the asset's design or external protecting features demonstrate resilience to flood damage.

New infrastructure assets over $2 million

All new infrastructure assets valued more than $2 million must assess design parameters against future climate conditions coinciding with the 30-year climate

period occurring during the end of the infrastructure's design life. This must be completed by performing a climate risk assessment of a quality consistent with the Infrastructure Canada Climate Lens, ISO 14091, ISO 31000, PIEVC High Level Screening Guide, or equivalent, and providing the resulting risk assessment to GMF.

The following steps are necessary to complete this requirement:

- gather climate data from reliable sources, including publicly available sources such as Climate Data for a Resilient Canada, Climate Atlas of Canada, the Design Value Explorer, and the forthcoming Government of Canada Flood Hazard Information Portal. Data includes historical climate records, such as temperature, precipitation, wind patterns and extreme weather events, as well as future climate projections for the project area.
- infrastructure design specialists should analyze the climate data to identify the specific climate risks and vulnerabilities that the infrastructure may face. This includes assessing the potential impacts of climate change, such as increased temperatures, changing precipitation patterns, rising sea level, or more frequent and intense extreme weather events.
- conduct a climate risk assessment to evaluate the vulnerability of the infrastructure to climate risks and identify areas where adaptation measures are needed. This assessment considers the specific design requirements, potential exposure to climate hazards and the criticality of the infrastructure's function.
- use the climate data and projections to determine the appropriate design parameters for the infrastructure. This may include factors such as design temperatures, rainfall intensities, wind speeds or storm surge levels.
- develop adaptation strategies and design features to address the identified climate risks, if required. This may involve incorporating protective measures, such as flood-resistant structures, increased drainage capacity or heat mitigation strategies.

Where the climate risk assessment has identified a high degree of risk resulting from flooding, risk mitigation measures should reflect the following criteria:

- the asset should be elevated above the 100-year floodplain during the 30-year climate period associated with the last decade of the asset's design life, where hydrological modelling has factored in downscaled climate change projection, unless evidence can be provided of structural floodproofing to this level; or
- the asset should be elevated above, be protected against or include structural design interventions (such as the placement of critical components) that would allow a rapid resumption of service following a 200-year rainfall event, as determined by a site-level flood and drainage assessment; and
- where relevant, the asset should be substantially compliant with the Federal Guide for design of flood-resistant buildings or the provincial/territorial equivalent.

Where the climate risk assessment has identified a high degree of risk resulting from wildfire, risk mitigation measures should ensure facilities and infrastructure constructed in at-risk wildland–urban interface regions are consistent with the National Guide for Wildland ([Urban Interface Fires)](#).

Where the climate risk assessment has identified a high degree of risk resulting from permafrost degradation, risk mitigation measures should be compliant with CSA S501:21, CSA PLUS 4011:19, or CAN/BNQ 2501-500.