

## PROJECT DOCUMENT FOR THE ENERGY SMART FUND

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### ENERGY EFFICIENT AND RENEWABLE ENERGY LOAN FACILITY [INSERT COMPANY NAME]

#### **Instructions:**

Eligible businesses, organizations, and companies seeking to apply for a loan from the Energy Smart Fund's Energy Efficiency (EE) Retrofit and Renewable Energy (RE) Finance Facility should prepare a Project Document utilizing this template. Add any additional columns and rows where necessary.

This document presents the Project Idea for the application under the Energy Smart Fund for a loan under the EE Retrofit and RE Finance Facility.

#### **1: CONTACT INFORMATION**

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Name of applicant			
Address			
Contact person(s)			
Contact details	Phone:	Fax:	Email:

#### **2: BUSINESS DESCRIPTION**

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Briefly describe your business. Include:

- i. the size of the business<sup>1</sup>
  - Small business (gross annual sales or revenue up to BBD\$2 million)
  - Medium-sized business (gross annual sales or revenue between BBD \$2 and 5 million)
  - Large company (gross annual sales or revenue above BBD\$5 million)
- ii. the category of the business, e.g. agro-processing, accommodation services, etc.
- iii. the number of years the business has operated,
- iv. whether the business is incorporated under the Companies Act and if so, the date of incorporation.
- v. the number of employees,
- vi. the business' annual revenue.

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<sup>1</sup> Company size is based on Gross Annual Sales or Revenue. Large companies are ineligible for grants under the TA Facility

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**3: FUNDING REQUESTED**

State total cost of projects, funding requested, and other sources of funding (BDS\$):			
Type of funding	Total project cost (a)	Total funding requested (b)	Balance (a-b)
Loan (Finance)		[Maximum allowed: BDS\$2 million]	
State whether funding is available to cover the remaining balance, and indicate source of such funding:			

**4: GENERAL SITE INFORMATION**

<i>Location 1: (If there are multiple sites please provide the following information for each, where possible.)</i>	
Occupancy:	
Number of floors:	
Total floor area:	
Building envelope:	

**NB. Please ensure that all EE/RE interventions and removals are conducted in accordance with the prescribed Environmental Social Health and Safety Guidelines.**

Type of roof: (flat, gable, etc.)	
Roof material: (perma-clad, concrete, shingles, etc.)	
Roof size: <i>(applicable for proposed PV projects)</i>	
Year built/renovated:	
Land Size: <i>(applicable for proposed wind projects)</i>	
Car port size: <i>(applicable for proposed PV projects)</i>	
Annual electricity use (kilowatt hours–kWh):	
Electricity tariff (BDS\$/kWh):	
Location 2: <i>(If there are multiple sites please provide the following information for each, where possible.)</i>	
Occupancy:	
Number of floors:	
Total floor area:	
Building envelope:	
Type of roof: (flat, gable, etc.)	
Roof material: (perma-clad, concrete, shingles, etc.)	
Roof size: <i>(applicable for proposed PV projects)</i>	
Year built/renovated:	
Land Size: <i>(applicable for proposed wind projects)</i>	

**NB. Please ensure that all EE/RE interventions and removals are conducted in accordance with the prescribed Environmental Social Health and Safety Guidelines.**

Car port size: <i>(applicable for proposed PV projects)</i>	
Annual electricity use (kilowatt hours–kWh):	
Electricity tariff (BD\$\$/kWh):	

**NB. Please ensure that all EE/RE interventions and removals are conducted in accordance with the prescribed Environmental Social Health and Safety Guidelines.**

## 5: PROJECT DESCRIPTION

### Energy Efficiency (EE) and Renewable Energy (RE) Loan Facility

*If you are applying for a loan, please fill in the following tables to the best of your knowledge (use information from an EE audit, where applicable). Please provide information for each EE and/or RE project. Include any relevant data sheets and technical specifications where practicable.*

Energy Efficient Retrofits and Energy Conservation Measures	
EE Retrofits/measures to be implemented:	
<i>Give brief background of the issue to be addressed; project justification; identify stakeholders and beneficiaries (where appropriate). Briefly describe the type of measures to be introduced to resolve the problem.</i>	
EE Retrofit 1 - (insert name e.g. Energy Efficient Lighting)	
Number of units (number)	
Technology type (specify type)	
Technical Specifications (attach data sheet):	
Site Plan (attach google map or other relevant photo)	
Size (where applicable)	
Lifetime (years)	
Unit cost ( BBD\$, turnkey)	
Total Cost (BBD\$)	
EE Retrofit 2 - (insert name e.g. Air conditioners)	
Number of units: (number)	
Technology type: (specify type)	
Type of Refrigerant:	
Technical Specifications (attach data sheet):	
Site Plan (attach google map or other relevant photo)	

**NB. Please ensure that all EE/RE interventions and removals are conducted in accordance with the prescribed Environmental Social Health and Safety Guidelines.**

Size: (where applicable)	
Lifetime: (years)	
Unit cost: ( BBD\$, turnkey)	
Total Cost: (BBD\$)	

*Please provide information for each EE Retrofit in the boxes above. Add additional boxes where necessary.*

EE Retrofits/measures Summary Table:						
EE Retrofit or measure (e.g. LED Lighting retrofit)	Unit cost (BDS\$)	Units (#)	Total cost (BBD\$)	Annual energy savings (kWh)	Annual cost savings (BBD\$)	Payback period (years)
<b>Total</b>						

**NB. Please ensure that all EE/RE interventions and removals are conducted in accordance with the prescribed Environmental Social Health and Safety Guidelines.**

*If you are applying for a loan to implement a RE system, please fill in the following table to the best of your knowledge (use information from a RE feasibility study, if there is one).*

<b>RE Systems</b>	
RE technologies to be implemented (indicate solar, wind, or waste resource potential available):	
<i>Give brief background of the issue to be addressed; project justification; identify stakeholders and beneficiaries (where appropriate). Briefly describe the type of measures to be introduced to resolve the problem.</i>	
RE system #1: (insert name e.g. Wind system, PV System, or Solar Water Heater)	
Number of units: (number)	
Technology type: (indicate solar water heater, solar photovoltaic, wind, biomass or waste resource potential)	
Mounting structure: (roof, ground, car port, etc.)	
Type of connection: (on-grid, hybrid, off-grid)	
Size: (kW, kW <sub>thermal</sub> , or gallons)	
Technical specification: (attach data sheet):	
Site Plan (attach google map or other relevant photo)	
Lifetime: (years)	
Installed cost: (BBD\$, turnkey)	
Annual maintenance costs: (BBD\$ per year)	
Est. annual output: (kWh/kWh <sub>thermal</sub> per year)	
Est. capacity factor: (percent)	
Est. generation cost: (BBD\$),/kW <sub>thermal</sub> )	
Est. annual savings: (BBD\$)	
RE system #2: (insert name e.g. Wind system, PV System, or Solar Water Heater)	
Number of units: (number)	

**NB. Please ensure that all EE/RE interventions and removals are conducted in accordance with the prescribed Environmental Social Health and Safety Guidelines.**

Technology type: (indicate solar water heater, solar photovoltaic, wind, biomass or waste resource potential)	
Mounting structure: (roof, ground, car port, etc)	
Type of connection: (on-grid, hybrid, off-grid)	
Size:(kW, kW <sub>thermal</sub> , or gallons)	
Technical specification: (attach data sheet):	
Site Plan (attach google map or other relevant photo)	
Lifetime:(years)	
Installed cost: ( BBD\$, turnkey)	
Annual maintenance costs: (BBD\$ per year)	
Est. annual output: (kWh/kWh <sub>thermal</sub> per year)	
<b>Summary of all RE systems</b>	
Total size (kW, kW <sub>thermal</sub> , gallons)	
Total installed cost (BDS\$, turnkey)	
Total annual maintenance costs (BDS\$ per year)	
Total est. annual output (kWh/kWh <sub>thermal</sub> per year)	
Total est. annual savings (BDS\$)	
<b>Explain the financial viability of proposed systems:</b>	
<b>Describe permitting/planning status of proposed systems (including any environmental impacts expected and, if any, actions to mitigate/reduce/avoid them):</b>	

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If you are applying for a loan for EE and/or RE working capital, please fill in the table to the best of your knowledge.

<b>Working Capital</b>				
<b>Technical and financial feasibility of the technologies to be manufactured or assembled:</b>				
<p>Give brief background of the issue to be addressed; project justification; identify stakeholders and beneficiaries (where appropriate). Indicate if the Working Capital is to justify a special order or projected sales.</p> <p>Describe Technical and financial feasibility of the technologies to be manufactured or assembled:</p>				
<b>Material/equipment to be purchased:</b>				
Material	Purpose	Unit cost (BDS\$)	Units	Total cost (BDS\$)
<b>Total</b>	<b>NA</b>	<b>NA</b>	<b>NA</b>	
<b>Outputs expected to be manufactured or assembled using working capital requested (indicate type, size, and quantity of outputs):</b>				
<b>Expected performance of outputs manufactured or assembled (indicate energy savings or generation of outputs):</b>				

**NB. Please ensure that all EE/RE interventions and removals are conducted in accordance with the prescribed Environmental Social Health and Safety Guidelines.**

<b>Electric Mobility Projects</b>	
Electric mobility project to be implemented: <i>(add rows where needed)</i>	
<i>Give brief background of the issue to be addressed; project justification; purpose and beneficiaries (where appropriate). Briefly describe the type of vehicles to be procured</i>	
Details on Vehicle(s) to be replaced if applicable:	
Year /Type/Brand	
Engine Size	
Odometer reading to date	
Annual Cost of fuel (BBD\$)	
Value	
Use (s)	
Electric Vehicle Type 1 - (insert name e.g. Electric Car, Nissan Leaf)	
Number of Electric Vehicles	
Brand/Type	
Model Year of Vehicle	
Technical Specifications (attach data sheet):	
Battery - Type and Size	
Battery - Expected Range	
Type of Charging	
Charger Specifications (attach data sheet)	
Warranty	
Battery Life (years)	
Unit cost ( BBD\$, turnkey)	
Total Cost (BBD\$,)	
Electric Vehicle Type 2 - (insert name e.g. Electric bus. Yukon)	
Number of Electric Vehicles	
Technology (Brand/Type) type)	

**NB. Please ensure that all EE/RE interventions and removals are conducted in accordance with the prescribed Environmental Social Health and Safety Guidelines.**

Technical Specifications (attach data sheet):	
Size (where applicable)	
Lifetime (years)	
Unit cost ( BBD\$, turnkey)	
Total Cost (BBD\$)	
Does building have solar PV system? If yes indicate the size.	
Is a solar PV carport being proposed? If yes complete section on RE Measures.	

*Please provide information for each EE Retrofit in the boxes above. Add additional boxes where necessary.*

Electric Vehicle Summary Table:						
EE Retrofit or measure	Unit cost (BBD\$)	Units (#)	Total cost (BBD \$)	Annual energy savings (kWh)	Annual cost savings (BBD \$)	Payback period (years)
(e.g. Nissan Leaf)						
<b>Total</b>						

**NB. Please ensure that all EE/RE interventions and removals are conducted in accordance with the prescribed Environmental Social Health and Safety Guidelines.**

## 6: ADDITIONAL INFORMATION

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Tick the information submitted along with the Project Document:

	A signed Letter of Intent
	Certificate of Incorporation, <b>Articles of Incorporation, Notice of Address/Change of Address, Notice of Directors/Change of Directors, By-Laws</b>
	Copies of electricity and gas bills for the last 12 months
	Energy Audit
	Relevant quotations, data sheets and/or technical specification documents
	Financial Statements, etc.
	Governmental approvals, permits and consents (e.g. Town Planning Approval)

*If you have **NOT** submitted an energy audit please ensure that the relevant technical information is provided not only on the proposed technologies but also the **existing equipment to be retrofitted** (this should include details on: equipment type, specifications, energy use, amounts etc).*

*Please be advised that the Smart Fund Technical Committee may require an Energy Audit to be conducted where necessary. Therefore, it is recommended that this be reserved for small and simple projects.*

Version dated:            September 2022

## 7: SIGNATURE

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\_\_\_\_\_  
**Name of Client**

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Name of Smart Fund Partner**

\_\_\_\_\_  
**Signature**

**NB. Please ensure that all EE/RE interventions and removals are conducted in accordance with the prescribed Environmental Social Health and Safety Guidelines.**

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