









Agenda

- 1. Introductions
- 2. Fortis Deep Energy Retrofit Pilot Program
- 3. Forte Deep Energy Retrofit Project
- 4. Field Guide to Retrofits in Occupied Buildings
- 5. Discussion + Q&A





Candace Le Roux

- Regional Property Manager for BentallGreenOak
- 30+ years of experience in the real estate management field



Ya'el Santopinto

- Architect, Principal, and practice lead at ERA Architects
- ERA's lead Tower Renewal Architect, with specialized expertise in retrofit with residents in place

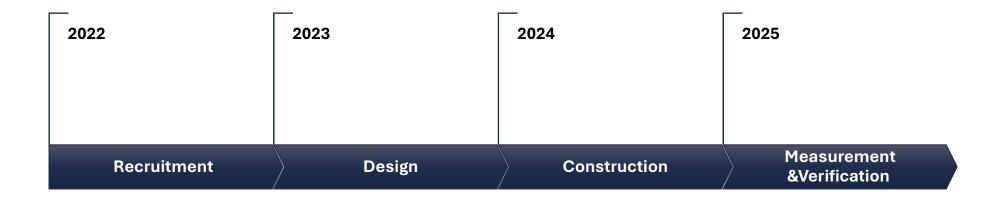


Fortis BC Deep Energy Retrofit Pilot Program

- Scope: Implement deep energy retrofits that improve building energy performance through a holistic approach that targets the envelope and mechanical systems
- · Scale: 20 single-family homes and 4 multi-unit residential buildings
- Objective: Reduce energy use and emissions by >50% while retaining natural gas the primary heating fuel
- Goal: Inform future education and incentive programs
- Funding: Costs of all ERMs were rebated by Fortis; participants agreed not to use the upgrades as a basis for rent increases or evictions



Fortis BC Deep Energy Retrofit Pilot Program: Part 3





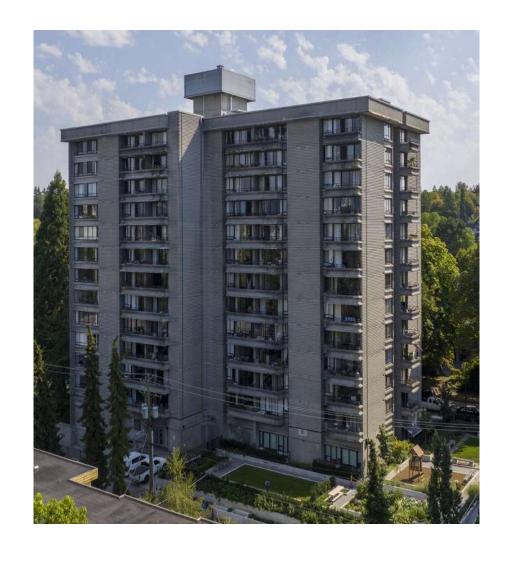
Forte Deep Energy Retrofit

· Location: Vancouver

 Building type: 13-story concrete high-rise; rental apartments, 135 suites

• Date of Construction: 1971

Building owner: Bentall
 Green Oak





Forte DER Project

May 30, 2025

Forte DER Project

Introduction

BentallGreenOak

Real estate investment firm headquartered in Miami, Florida that provides investment, lending, and property management services

- \$86B in assets under management
- 750+ clients and partners
- Holdings in 13 countries

Introduction

Candace Le Roux

Regional Property Manager, British Columbia

- Over 26 years of experience in the multi-residential industry including leasing, resident relations, property operations, capital projects, and budget management
- · Real Estate License with the BC Real Estate Association
- Certified Property Manager and Accredited Residential Manager designations with the Real Estate Institute of Canada
- · Past president of the Real Estate Institute of Canada (2015-16)
- · Instruction for the Real Estate Institute of Canada
- · Human Resources Diploma, South Africa

Forte (Burrard and West 14th)

Before



Forte (Burrard and West 14th)

After



Deep Energy Retrofit

Emission Reduction Measures

- Roof insulation
- Window replacement
- Airtightness improvement
- Gas heat pumps
- Heat recovery ventilation
- MUA with integrated cooling
- Cooling-ready upgrades
- Solar thermal pre heat

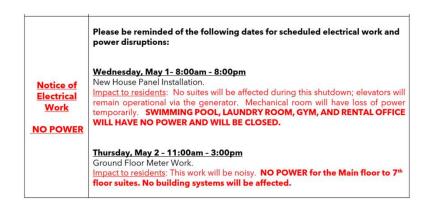


cnallenges

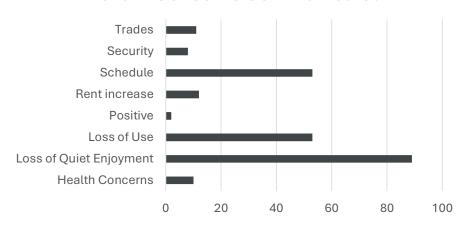
- Magnitude of the project
- Numerous moving parts
- Employees, trades, consultants etc.
- Demanding on the site staff
- Numerous entries into tenant homes, very intrusive
- Additional staffing needed for access to suites i.e., security
- Building enclosed in blue tarp over the fall and winter months
- Construction Schedules No shows, sickness, sub trades, product availability

Tenant Engagement

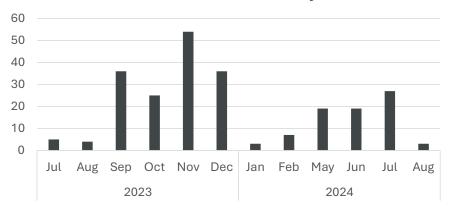
- Pre-project open house
- Separate email address set up for tenant complaints and concerns
- Concern tracker
- Weekly communication to all tenants with upcoming schedule (example below)



Tenant Concerns Communicated



Tenant Communications by Month

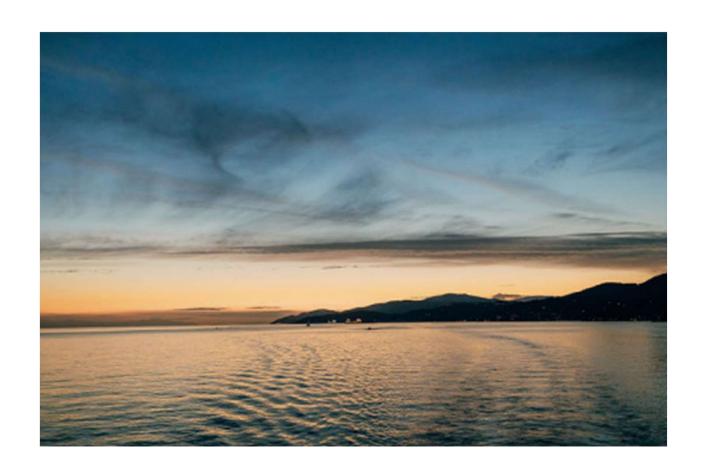


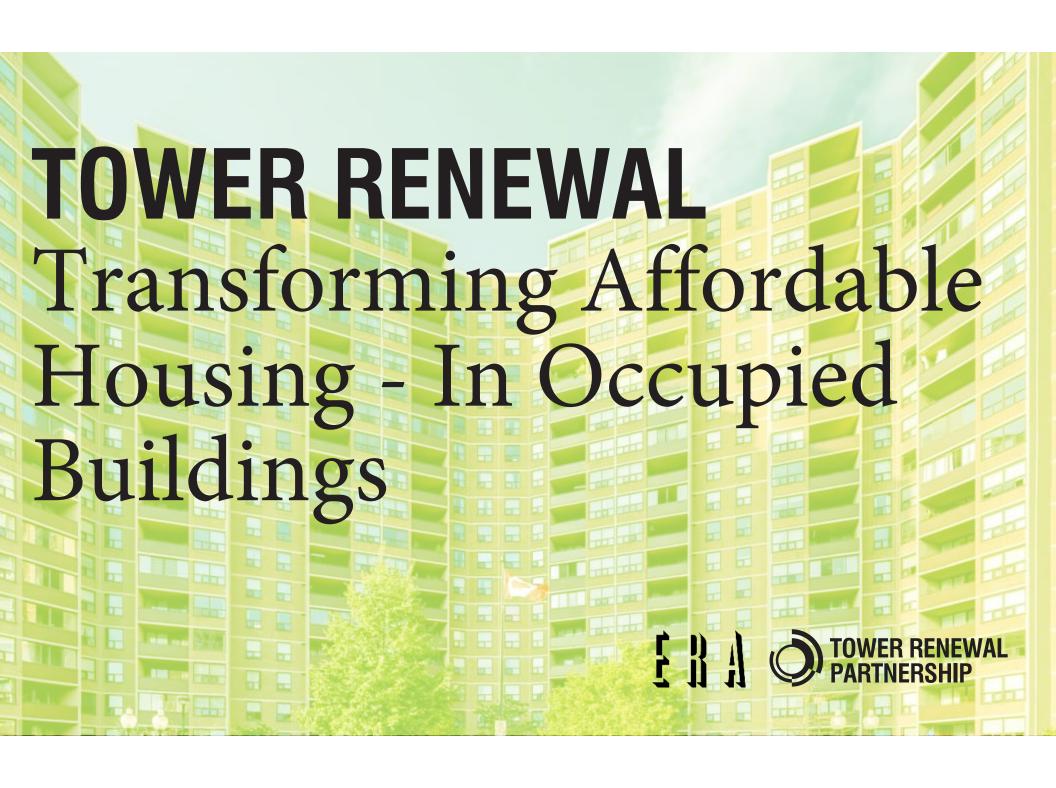
Lessons Learned

- Project Roll Out Open house with detailed information of project including samples of products and subject matter experts to explain the products. Orient residents across a oneweek period, allowing tenants to ask questions
- Adequate Staffing Additional staffing for project, separate to running the existing building due to increased workload
- GC Collaboration Weekly meetings with GC and operations invaluable
- · Resident Communication Weekly communication to keep tenants informed
- Complaint Monitoring Tenant complaints monitored and dealt with timeously

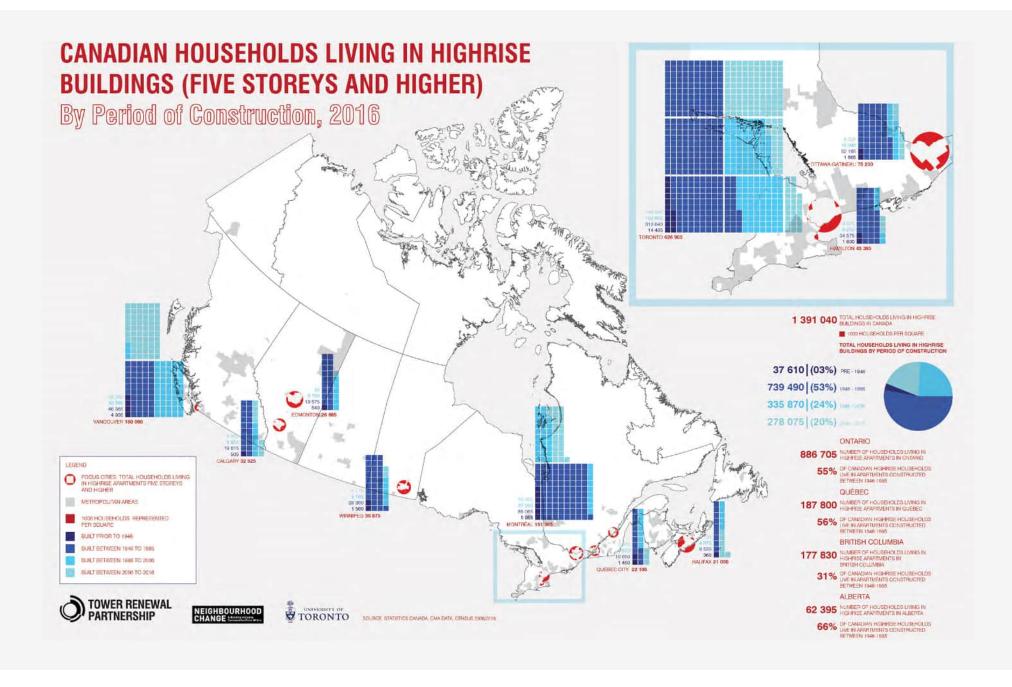
Post Project and Celebration











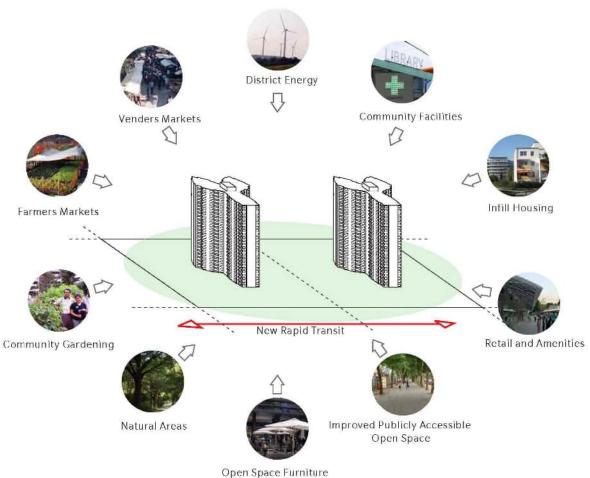




TOWER RENEWAL

Targeted green renewal and community reinvestment that will enable existing high-density tower neighbourhoods to emerge as self-sufficient, economically vibrant, socially diverse, culturally integrated and 'low carbon' communities throughout the city and region.

Creating Sustainable and Vibrant Neighbourhoods



Eco-Retrofits (60%+ GHG Reductions)



Social & Economic Life



Neighbourhood Transformations











Financing

Funding building retrofit with loan levels, interest rates and grants tied to achieving specific performance standards

Standards

Housing quality standards for retrofit implemented through building codes. Guidebooks to lead stakeholders through process with clear evidence base for investments

HOUSING REHABILITATION

Long-term Stewardship

Retrofit Industry

Research and development, skills training, new products, means and methods for a made-in-Canada approach

























































































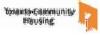


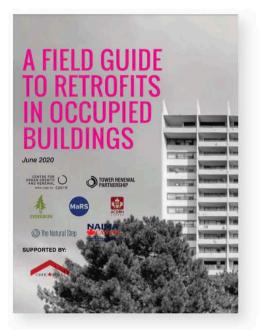


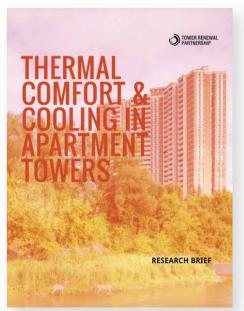


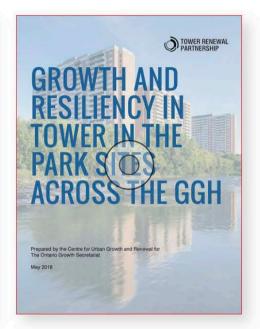


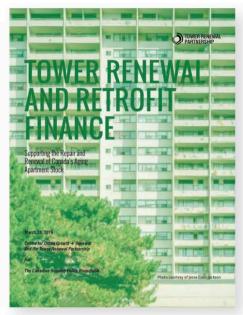


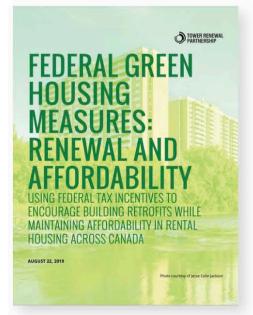


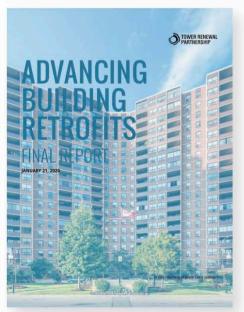




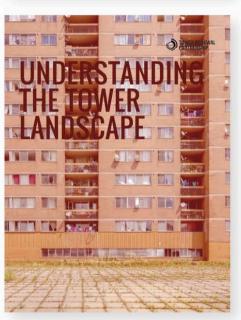












TOWER RENEWAL **SELECTED TIMELINE** \$42B \$15.9B National Co-Investment Fund Housing Lanch Strategy Lanch 2017 **Federal** \$82M SHARP Tower \$657M SHAIP Tower Retrofit Program Government Launch (2018 Program Cancelled) Retrofit Program Launch 2017 Interministry Tower Renewal Province of Group Launch 2016 **Ontario RAC** Zoning Implemented in 450+ Sites 2017 Throughout 2009 TransformTO City Tower Renewal Launches **City of Toronto** Program 2014 2016 2019 deep retrofit Launch Toronto Hi-RIS Toronto Hi-RIS Tower targets Retrofit Financing Program Extension Renewal 2017 Citywide STEP **Program Launches** Reflected in Intermunicipal Official Plan Program Launch **Tower Renewal** Group convened 2010 2015 2015 2010 2017 2019: **United Way** TAF TAF \$1.3B SELECTED ACTORS Strong Tower **TowerWise Tower Wise Neighbours Strategy** Program **TCHC Project** Secured in Launch federal support 2009 2011 2015 2017 for deep retrofits City Tower **United Way** TCHC SHARP TCHC **Toronto** Renewal First Generation 2018 undertakes Vertical Pilot Site of Deep Tower CityHousing dozens of deep Lanch **Poverty Action** Retrofits Hamilton energy retrofits Launch 2009 2013 Toronto 2014 Ken Soble 2016 TRCA **Public Health TCHC** Passive House Foodshare 2017 SNAP Board of Health 250 Davenport SHAPE Tower Retrofit Good Food Program **Endorsement Tower Renewal** Launch markets in **Funded Projects** Launch of Healthy Project Launch Across Province Towers **TOWER RENEWAL**

PARTNERSHIP

Towers Action







Relmagine. ReBuild. ReCover.

PEER - Prefabricated Exterior Energy Retrofit

Developing, testing and validating innovative prefabricated building envelope technologies for retrofitting existing Canadian homes from the exterior.































Key Challenges

Deteriorating envelopes

Lack of insulation

Inadequate ventilation

Mould and hazardous materials

Lack of thermal control

End of life systems

Occupied buildings











Financing

Funding building retrofit with loan levels, interest rates and grants tied to achieving specific performance standards

Standards

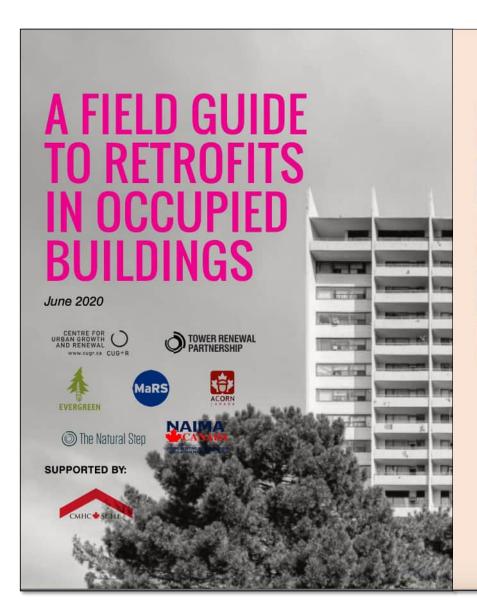
Housing quality standards for retrofit implemented through building codes. Guidebooks to lead stakeholders through process with clear evidence base for investments

HOUSING REHABILITATION

Long-term Stewardship

Retrofit Industry

Research and development, skills training, new products, means and methods for a made-in-Canada approach





The Landlord Considers doing a Retrofit



A Team is Hired to Plan and Design the Retrofit

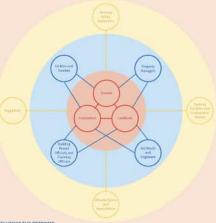


A Contractor is Selected to do the Work



Construction Takes Place in Your Apartment Unit

Residents Adjust to Post-Construction Apartment and Provide the Landlord with Feedback



INFLUENCE THE RETROFIT DIRECTLY

INFOUNCE THE RETROPT

ACTIVE DAY-TO-DAY IN THE RETROFIT

3

The following sections introduce the general phases of a tower retrofit. In each section, we break down the things that need to be taken into consideration with respect to landiords, tenants and industry experts. We know there are additional people and roles to take into consideration, but our focus is on these three groups of people given how critically important they each are for a successful tower retrofit.

FIELD GUIDE

INTRODUCTION



The Landlord Considers doing a Retrofit



A Team is Hired to Plan and Design the Retrofit



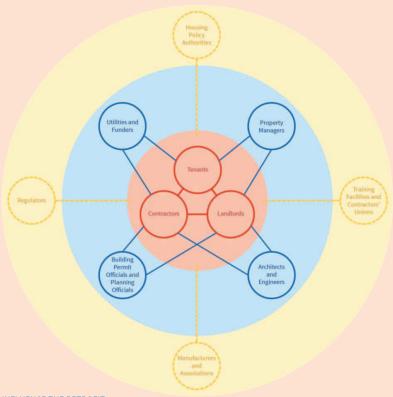
A Contractor is Selected to do the Work



Construction Takes Place in Your Apartment Unit



Residents Adjust to Post-Construction Apartment and Provide the Landlord with Feedback



INFLUENCE THE RETROFIT DIRECTLY

INFLUENCE THE RETROFIT INDIRECTLY

ACTIVE DAY-TO-DAY IN THE RETROFIT

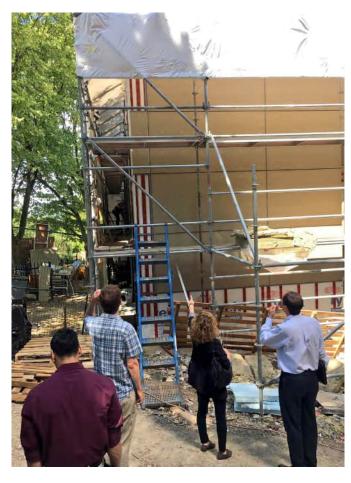
CASE STUDY PROJECTS



Windrush Towers, Oxford UK



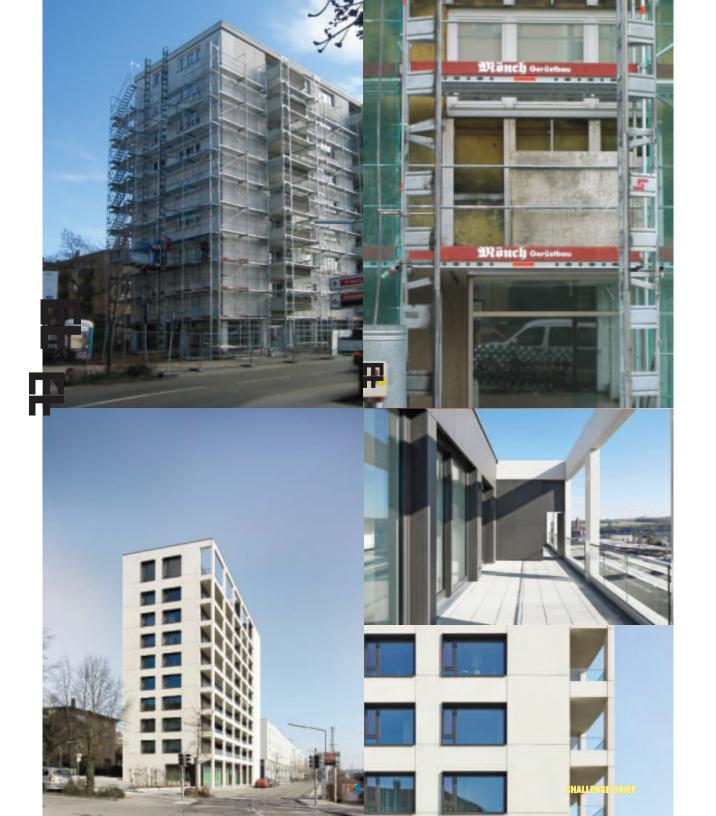
Gueterstrasse 30, Pforzheim, DE



Grandview Terrace, Vancouver BC







SOLUTIONS: INCORPORATE TENANT LIAISON ROLE INTO CONTRACTOR REQUIREMENTS

Incorporate Tenant Liaison Role into Contractor Requirements

Carrying out a construction project in an occupied building is complex: shared vertical access, maintaining exit routes, scheduling notifications for suite access, and maintaining safe and clear work areas inside people's homes can all pose challenges above and beyond a typical construction project. This unique set of challenges can be offset by incorporating a new role into the construction team: a "Tenant Liaison" can be responsible for foreseeing these scheduling and logistical challenges, and building solutions into the construction project.

The integration of a Tenant Liaison into retrofit projects can reduce construction delays, eliminate unforeseen remobilization and lost productivity costs, and provide tenants with a single, trusted point of contact who is on site at all times.

In many cases, the Tenant Liaison will know most tenants' names and unique needs, having completed surveys to identify things like respiratory or mental health conditions, overcrowding or hoarding, mobility assistance required, etc.

While some owners may prefer to fill this role themselves, there are significant benefits to integrating this role into the construction team: construction schedules, access and sequencing plans should be directly and dynamically informed by the Tenant Liaison.

SOLUTIONS FIELD GUIDE

SOLUTIONS: SPECIALIZED TRADES TRAINING PROGRAMS

Specialized Trades Training Programs

Training programs and certifications can play a role in familiarizing trades with the special skills required to work in occupied buildings. Communication procedures, sequence planning, scheduling for anticipated refused entry, safety and workplace protocols will all be part of this training.

Building this comfort and expertise into retrofits will expedite the process, while decreasing the "risk premium" making retrofits cheaper. Construction and design industries typically price work according to their comfort, experience and potential liability with the work which can result in higher costs for projects with new or different processes.

How is the training implemented?

A trades training program can be offered by construction associations, colleges and training facilities, or even in-house by specialized contractors.

Owners requiring or preferring contractors with this specialized retrofit certification will make it increasingly desirable, as more retrofit projects come online.

What are the Next Steps?

NAIMA Canada in partnership with TRP has developed a draft curriculum for a "Tenant Liaison Training Program", alongside a sample "Healthy Housing Advocacy" training module. These can be used as the basis for development of programs across a number of institutions.

SOLUTIONS FIELD GUIDE





SOLUTIONS: PREVENTING RENOVICTIONS

Preventing Renovictions

In some Canadian markets with low vacancies, renovictions are increasingly common. This is a practice where landlords force eviction, typically by raising rents above rent control guidelines, under the premise of a renovation. Often those renovations are cosmetic in nature, with little to no benefit to the tenant. Due to this trend, tenants are often concerned by news of retrofits in their buildings, which have come to signal pending housing insecurity rather than improved housing quality.

What can be done to prevent renovictions?

Municipal Actions & Solutions

- Protect Rental Housing
 - Introduce Rental Replacement policies which make 'condo-ization' illegal.

Data & Tracking

- Create inventory of buildings, work orders, code violations, etc.
- Keep track of all apartment buildings sold, and immediately inform tenants of their rights;
- · Regulate and publicly register all tenant "buyouts."

Enforcement:

 Increase authority of Municipal Licensing and Standards divisions within cities to enforce housing standards.

· Tenant Protection:

- Create an anti-displacement strategy and introduce tenant protection policies
 - Ensure owners/developers give all displaced tenants suitable housing options:
 - Consider enforcing new/existing regulations on tenant buyouts and tenant relocation through building permit approval processes and all tools/ mechanisms available to the Municipality;
- Provide tenants and/or owners with resources for connecting someone in crisis with the right suppor system;

SOLUTIONS FIELD GUIDE















444 LOGAN **RENEWAL**







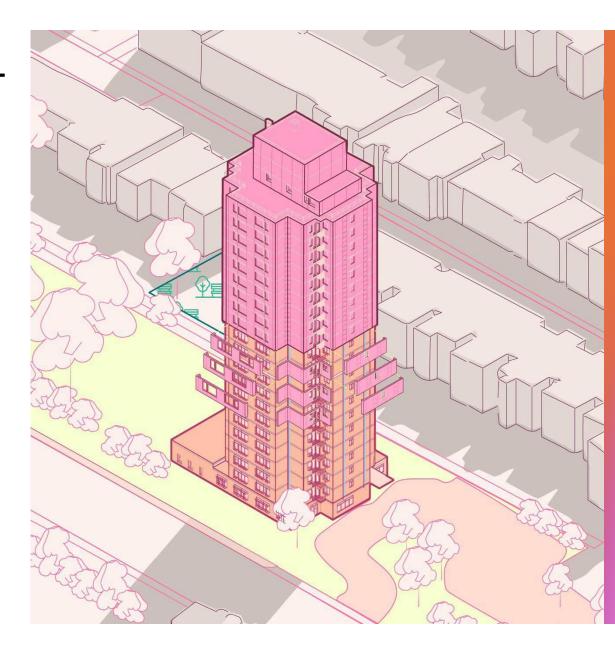


PANELIZED RETROFIT

- Reduce durations
- Minimize work in-suites
- QA/QC in the shop

However:

- Few retrofit-ready systems on the market
- Almost none with installed track records



OUTSIDE-IN APPROACH

- New HVAC distribution integrated into overcladding
- Simple core into suites to install fan coils
- Distribution access panels integrated into façade



A TENANTS-FIRST APPROACH

TENANT COMMUNICATION STRATEGY OVERVIEW

ONGOING GENERAL COMMUNICATIONS

Unit Access Notices

Lobby Community Board Updates

Direct Tenant Communication Lines

Public Email Bulletins

Project Website

ENGAGEMENT EVENTS

Project Kick-Off Open House

Public Open House

Resident Committee Meetings - Monthly

Resident Tea Sessions - Monthly

Tenant Design Input Session

Mock-Up Unit Open House

Construction Completion Event

- Dedicated role on construction team: Tenant Liaison
- Tenant steering committee
- Ongoing engagement program
- Sequencing plans designed to limit suite entries
- Regular evaluation and monitoring





INDUSTRY-INTEGRATED APPROACH

- Trade and manufacturing engagement through design from conception
- Early constructability workshops held with key trades **IDP-style approach**
- TAF Retrofit Accelerator partnership allowed for this early integration





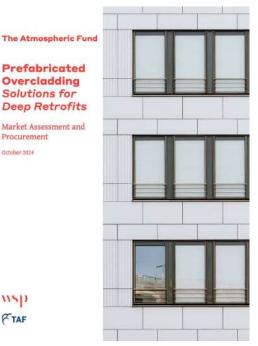
ADVANCES IN PANELIZATION

The Atmospheric Fund / WSP's

Market Assessment

Prefabricated Overcladding Solutions for Deep Retrofits Market Assessment and

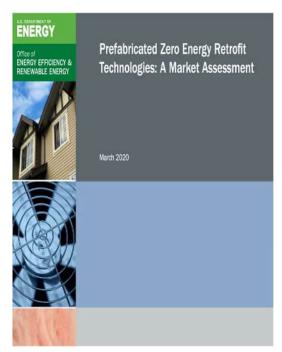
Procurement



NRCan PEER // Ottawa Community Housing's Presland Road



Rocky Mountain Institute's Market Assessment



Pembina's Reframed Initiative













Rocky Mountain Institute (RMI)

Test, Learn, Scale: Progress and Lessons from Building Retrofits

RMI is a nonprofit organization that advances clean energy transitions through a variety of economic sectors, with a large focus on buildings. Its Carbon Free Buildings practice facilitates deep energy retrofits for affordable housing in Massachusetts, California, and beyond, through research and analysis, programming and policy, and direct experience with emerging technologies and construction projects. Three recent projects showcase innovative envelope solutions and opportunities to scale market adoption of deep retrofits.

Two retrofit projects in Massachusetts are integrating high-performance, prefabricated overclad panels and new central mechanical systems—with distribution contained between the panels and the original building exterior. These upgrades will achieve significant energy and carbon savings, improved thermal comfort and indoor air quality, and bolstered passive resilience. With this approach, these projects will experience minimal disruption to tenants, as brief as one day of displacement. A third project in Corona Del Ray, CA, also achieved substantial performance upgrades with minimal disruption. This design utilized an insulated Dryvit (Tramco) Fedderlite and Revitalite panel system and was an effective approach to address both energy needs and seismic upgrades. While the panelized overclad was successful at this location, project data analysis from multiple whole-building retrofits in GA showed that in milder climates, lighter-touch methods, such as insulated roof panels and strategic air sealing. proved to be very effective and more financially justifiable.

Collaborative and pioneering projects like these enable research, development, deployment, and refinement that can build leading-edge market delivery capacity.

Further resources:

rmi org/our-work/buildings advancedbuildingconstruction.org





A/RMI REALIZE-CA Design & Installation Guide

REALIZE-CA Design & Installation Guide Click Here for Full Report

Relevant reports:

REALIZE-CA Design & Installation Guide A Marketplace for Equitable Building Retrofits Accelerating Residential Building Decarbonization The Retrofit Playbook for Large Buildings Prefabricated Zero Energy Retrofit Technologies

What is needed for the field of deep retrofits to flourish in future?

- · building decarbonization is normalized, with costs, availability, and attainability no longer as barriers
- . the value-add of retrofits, including avoided externalities and risk reduction, is fully integrated into decision-making
- · a thriving market—supported by industry experience, consistent finance mechanisms, a robust ecosystem of stakeholders, policies, and innovation-eliminates the need for separate grants, rebates, and





Co-founder and Design Director, Recover Initiative

The ReCover Initiative

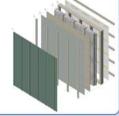
The ReCover Initiative is Atlantic Canada's Deep Retrofit Accelerator Founded in Halifax, Nova Scotia ReCover completed eight feasibility studies researching the potential of panelized deep retrofits for buildings between 2020 and 2023. A study of a six-unit building owned by Toronto Community Housing led in 2022 to an NRCan funded project in collaboration with six municipalities in Canada (Halifax, New Glasgow, Colchester, Saskatoon, Cakville, Burlington) studying panelized deep retrofits for buildings including community centres, transit buildings, and office spaces. Design scenarios targeted at least 50% energy use intensity reduction, net zero energy ready, installation of air source heat pump or ground source heat pump, and ultimately net zero energy. All six schemes employ low embodied carbon wall panel assemblies comprising wood stud framed wall layered with a variable permeability vapour control followed by cellulose, plywood sheathing, water resistant barrier membranet rainscreen, and finally metal cladding. The project found that the use of cellulose panels more than offsets the carbon cost of the retrofits due to the biogenic carbon stored in the panels. However, cellulose panel assemblies did not always have sufficient drying potential and more research is needed on hygrothermal analysis for this approach.

Further resources:





- 1. metal cladding
- 2 rainscreen
- 3. WRB membrane 4. plywood sheathing
- 5. dense packed cellulose
- 6. framing
- 7. vapour control
- B. interior strapping



ReCover Wall Panel Schematic

What is needed for the field of deep retrofits to flourish in future?

There are several barriers to address for Deep Retrofits to Ilourish in the future, including augmenting the capacity of the design and construction industries, derisking deep retrofits from both financial and technical perspectives and, perhaps most importantly, a mindset shift in evaluating building economics from a simple payback lens, to a holistic Total Cost of Ownership model."

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DANIEL CHUNG

Associate Professor of Building Science, University of Toronto

Reconstruct: Streamlining mass deep energy retrofits for Quebec & Canada

The Reconstruct research initiative aims to develop scalable turnkey solutions for deep energy retrofits (DER) in Quebec and elsewhere in Canada. Its approach focuses on improving the airtightness and insulation of the building envelope using prefabricated panels applied from the exterior of the building. The project is led by Professor Michael Jemtrud at McGill. Collaborators outside academia include organisations from research, industry, government, and the non-profit and community sectors. Reconstruct is funded by an NSERC Alliance Grant (2022-2027) in partnership with Hydro-Québec and the Ministère de l'Environnement, de la Lutte contre les changements climatiques, de la Faune et des Parcs.

Reconstruct's efforts are organised along live main axes: 1) Developing a deployment strategy and intermediary agency for DERs; 2) Engaging with the DER industry to expand capacity; 3)



The pilot to pipeline approach



SAUL BROWN

Empire Building Challenge Program Project Manager, New York State Energy Research & Development Authority

New York Envelope Treatments

New York State Energy Research & Development Authority's (NYSERDA) Empire Building Challenge Program manages deep retrofits in New York State and is engaged in developing retrofit technology with the aim of scaling it to mass market. Its demonstration projects have emproyed field-applied thermal overclad Exterior Insulation and Finish Systems (EIFS), EIFS thermal overclad with integrated mechanical, electrical, and plumbing delivery which minimizes resident disruption (demonstrated in the Retrofit NY-funded Casa Pasiva project in Bushwick, New York City), and prefabricated panels with thermal overclad with pre-fitted tenestration. and crefabricated panels overclad with integrated MEP delivery. NYSERDA also engages in research and development on integrated MEP systems, low embodied carbon prefabricated components (including wood, hemp, and mycelium), and automated construction scanning and installation systems.



ROUNDTABLE OUTCOMES

- Consensus that panelized solutions will unlock less disruptive and more cost-effective retrofits – but we are still in the early adopter phase
- Panelized assembly R&D has been focused on the new construction sector
- Retrofit solutions require extensive surveying and adaptation to variable conditions; still deemed risky
- Demand has been limited and therefore cost compression not yet realized
- Need for more pilots to demonstrate market potential
- Case studies need to be aggregated to help drive future demand



