

Program Ally Onboarding Process and Criteria for Scoping Audits and Engineering Studies - Guidance Document

Thank you for your interest in the Recreation Energy Conservation (REC) Program delivered by the Municipal Climate Change Action Centre (MCCAC). The REC Program helps municipally-owned recreation facilities reduce energy use and GHG emissions by providing financial incentives to help identify energy-saving opportunities and implement energy-saving projects. Through REC, municipalities can receive rebates for Scoping Audits and Engineering Studies that support investment decisions in addition to Implementation Project rebates for implementing energy efficient retrofits in their facilities. This document provides detailed information on the process and the onboarding criteria used by MCCAC to pre-qualify candidate Program Allies to deliver Scoping Audits and Engineering Studies as part of the REC program.

This onboarding process does not constitute an agreement for the Program Ally or Participant to receive funding. After review and approval of the completed Program Ally application form (along with the required supporting documents), Program Allies or their Participants can apply for Scoping Audit and/or Engineering Study funding. Program Allies may only undertake a Scoping Audit or Engineering Study after the Participant receives, signs, and returns an offer letter.

Once a candidate Program Ally has been pre-qualified and has indicated interest in participating in the REC program, they will receive a Confirmation of REC Terms and Conditions and Acknowledgements Letter. Once the executed Confirmation of REC Terms and Conditions and Acknowledgements Letter is received, contact information will be added to the REC Program Allies List on the REC program [website](#) and they can begin assisting municipalities with applications for Scoping Audits and/or Engineering Studies.

A Confirmation of REC Terms and Conditions and Acknowledgements Letter alone does not constitute an agreement between the Program Ally, and MCCAC or its affiliates, nor does it guarantee work or funding for the Program Ally or any municipality involved to receive funding. MCCAC is not obligated to pre-qualify any candidate. No obligations or legal relations shall exist between the MCCAC, its affiliates, or any successful or rejected Program Allies. No payment will be made by the MCCAC for the costs incurred throughout the Program Ally onboarding process.



1. Application Process

The first step to becoming an eligible REC Program Ally is to submit a completed [Onboarding Application Form](#). Once becoming a Program Ally, the product and service providers are pre-qualified to deliver projects eligible for energy efficiency incentives through the REC Program.

Application process:

- The Program Ally Onboarding Application Form can be found [here](#).
- Fill in your company information (e.g. address, areas of expertise) and submit the application form along with all required documentation to contact@mccac.ca.
- A representative from the MCCAC will notify you about your application status within one to two weeks of receiving your submission;
- Additional program specific information may also be requested and reviewed in order to determine your eligibility for the REC program. See below for complete details on the qualifications and insurance requirements.
- After compliance with all eligibility requirements has been demonstrated, the Confirmation of REC Terms and Conditions and Acknowledgements Letter will be sent for your signature.

2. Onboarding Instructions

Candidate Program Allies should refer to the [Scoping Audit and Engineering Study Requirements](#) to understand the scope, program eligibility, program incentives, and application process. The Requirements are included under "Resources for Program Allies" on the [REC Program webpage](#).

Candidate Program Allies must demonstrate a high level of diligence in performing Scoping Audits and/or Engineering Studies and follow the reporting rules as established in the Requirements. Non-Compliance to these rules may result in Program Allies being removed from the Program Allies list.

Examples of Non-Compliance (not limited):

- Use of faulty equipment for M&V to establish base line energy use;
- Attempts to over report savings without providing necessary details;
- Failure to respond to Queries and Request For Information (RFI) in allotted time;
- Undertaking work without prior experience in Specialty Areas (as defined in Appendix A);
- Failure to follow Safety Rules while performing work at Site;
- Submitting Scoping Audits / Engineering Study for Review without supporting documents;
- Failure to abide by the Scoping Audit and Engineering Study Requirements;
- Breach of Confidentiality Agreement(s);

- Any reports of complaints or repeated inconvenience caused to REC Program participants;
- Attempts to Co-Brand or act as Direct Sponsors for the REC Program on behalf of MCCAC without written Consent or Approval.

MCCAC reserves the right to remove or exclude Program Allies from participating in the Recreation Energy Conservation Program at their sole discretion.

3. Additional List of Requirements for Scoping Audits

Candidate Program Allies must submit each of the following documents before the Onboarding Application will be reviewed:

- Appendix A – Areas of Specialty or Expertise;
- Appendix B - Capabilities Statement;
- Appendix C – Relevant Project History;
- Appendix D – Project Reference.

Note: All reports and work at the Scoping Audit level must be completed or supervised by a professional engineer registered in the province of Alberta or a Certified Energy Manager/Certified Energy Auditor in good standing with the Association of Energy Engineers. Companies which provide engineering services must also hold a valid Permit to Practice in the Province of Alberta.

MCCAC may request additional references, proof of capabilities or other relevant information before it will determine that the Program Ally Capabilities Statement is complete for review.

4. Additional List of Requirements for Engineering Studies

Candidate Program Allies must submit each of the following documents before the Onboarding Application will be reviewed:

- Appendix A – Areas of Specialty or Expertise;
- Appendix B – Capabilities Statement;
- Appendix C – Relevant Project History;
- Appendix D – Project References.

Note: All reports and work at the Engineering Study level must be completed or supervised by a Professional Engineer registered in the Province of Alberta and the organization must also hold a valid Permit to Practice in the Province of Alberta.

MCCAC may request additional references, proof of capabilities or other relevant information before it will determine that the Program Ally Capabilities Statement is complete for review.

5. Minimum Onboarding Audit and Engineering Analysis Capabilities

5.1 Successful Candidate Program Allies will have demonstrated that they understand the objective of the REC Program, as well as industrial, institutional and commercial facilities energy use, the performance of energy-saving technologies, and are well-versed in the methods of energy auditing. In addition to the technical understanding of industrial, institutional and commercial

systems, Candidates must also demonstrate experience in energy assessment, and other forms of analysis covered in this document. Candidates are encouraged to focus their efforts where they have the deepest expertise. To that end, Candidates will identify their priority interest areas by either type of market sector or energy system end use as part of their Capabilities Statement.

5.2 By submitting materials in this Onboarding Process, Candidates warrant that they hold all necessary licenses or proper certifications from all appropriate municipalities, authorities, and governmental agencies in the Province of Alberta in which services will be performed, and that such licenses are now and shall remain current and in good standing. Candidates shall provide MCCAC with a copy of the required licenses if and when they are requested.

5.3 Program Allies understand that they do not act as Sponsors of the REC Program and should not try to co-brand the REC Program on behalf of MCCAC.

6. Required Insurance

6.1 When the Workers' Compensation Act (Alberta), as amended from time to time, applies, and upon request from MCCAC, the Candidate shall deliver a certificate from the Workers' Compensation Board showing that the Candidate is registered and in good standing with the Board;

6.2 General liability insurance, written on an occurrence basis, including bodily injury, property damage, personal injury, advertising injury, products and completed operations, and contractual liability, in an amount not less than:

6.2.1 Each Occurrence Limit \$2,000,000

6.3 Automobile liability insurance with a minimum limit of \$2,000,000 liability for bodily injury and property damage for all owned, rented, leased or hired vehicles used in conjunction with this Agreement;

6.4 The Program Ally must obtain and maintain errors and omissions insurance, in accordance with the Alberta Insurance Act, in an amount not less than \$1,000,000 per claim insuring its liability resulting from errors and omissions in the performance of its Services related to any REC program initiatives. This insurance is required to remain in place for a period of 12 months following the completion of Services related to REC program initiatives and this condition may be satisfied with a 12-month extended reporting period.

6.5 The corresponding coverage held by the Candidate is for the sole use and protection of the Candidate. All coverage obtained and maintained by the Candidate shall be primary to and non-contributory.

7. Notice of Program Allies Selection

Following its review of Candidate's submitted materials, MCCAC will notify selected Candidates whether they have been successful in becoming a Program Ally. Each confirmed Candidate must

acknowledge and sign the confirmation letter and return a signed copy to MCCAC. Following the sign-off, the Program Ally can proceed to take on specified projects.

8. Pre-Screening Governing Provisions

By submitting a Capability Statement in this Onboarding, Candidates acknowledge and agree to the following provisions:

Right to Accept or Reject Pre-screen capabilities: MCCAC reserves the right, in its sole discretion, to reject any or all applications in whole or in part, or to waive any minor irregularities or informalities in an application. In addition to any other enumerated reserved rights and/or options as stated in this Onboarding, MCCAC may in its sole discretion do any one or more of the following:

- Determine which Candidates are eligible for consideration in response to this Onboarding process;
- Not select Candidates that do not meet Onboarding requirements;
- Select Candidates who are most responsive to the Onboarding and whose Capabilities Statement best satisfy the interests of MCCAC;
- Issue additional subsequent Onboarding criteria that would supersede and replace this one;
- Vary any timetable or schedule, add or change any provisions discussed herein;

Suspend or modify the Onboarding process at anytime;

No Commitment: MCCAC is not obligated to enter into any agreement with any Candidate. No selection resulting from this Onboarding will be considered a commitment, and no obligations or legal relations shall exist between MCCAC and any selected Candidate(s).

Ownership and Return of Application Materials: All materials submitted shall become the property of MCCAC and shall not be returned to the respondent.

Costs: Application materials prepared in response to this Pre-screening Process will be prepared at the sole cost and expense of the Candidate and with express understanding that there will be no claims whatsoever for reimbursement from MCCAC.

APPENDIX A: Candidate Areas of Specialty and Expertise

Please use the boxes to indicate your firm's top five areas of specialty or expertise in each section below. Feel free to describe rationale, but please limit yourself to no more than five selections in each section. Please return these two pages with your capabilities statement.

Market Sector Experience (Top Five)

- | | |
|--|--|
| <input type="checkbox"/> Mining, Quarrying and Oil & Gas Extraction | <input type="checkbox"/> Pipeline Transportation |
| <input type="checkbox"/> Utilities | <input type="checkbox"/> Engineering, design, and construction |
| <input type="checkbox"/> Manufacturing | <input type="checkbox"/> Waste Management and Remediation Services |
| <input type="checkbox"/> Petroleum and Petroleum Products | <input type="checkbox"/> Community Colleges & Universities |
| <input type="checkbox"/> High Performance/Net-Zero Building Retrofits | <input type="checkbox"/> Energy management and building science |
| <input type="checkbox"/> Industrial Facilities | <input type="checkbox"/> Municipal facilities |
| <input type="checkbox"/> Building Material and Supplies Merchant Wholesalers | <input type="checkbox"/> Hospitals |
| <input type="checkbox"/> Recreation Facilities | |

Energy System End Use (Top Five):

- | | | |
|---|--|---|
| <input type="checkbox"/> Chillers | <input type="checkbox"/> HVAC | <input type="checkbox"/> Cogeneration / Combined Heat and Power (CHP) systems |
| <input type="checkbox"/> Chilled Water Systems | <input type="checkbox"/> Fan & Blowers | <input type="checkbox"/> Others (please explain) |
| <input type="checkbox"/> Pool heating | <input type="checkbox"/> Compressed air | _____ |
| <input type="checkbox"/> Refrigeration and ice plants | <input type="checkbox"/> Pumps | |
| <input type="checkbox"/> Boilers | <input type="checkbox"/> Heat Recovery Systems | |
| <input type="checkbox"/> Steam Systems | <input type="checkbox"/> Motors and Drives | |
| <input type="checkbox"/> Hot Water Systems | <input type="checkbox"/> Lighting | |
| <input type="checkbox"/> Water Heating | <input type="checkbox"/> Energy Auditing | |

APPENDIX B: CAPABILITIES STATEMENT

The Capabilities Statement should include the following and not exceed five pages:

1. Itemize the technical services and any areas of specialty your company provides.
2. Describe the experience of each person who will be providing the service and preparing the reports. Include licenses, registrations, or other certifications. Describe any subconsultant relationships if applicable.
3. Provide details on your organization's capacity/availability to serve Alberta municipalities.

APPENDIX C: RELEVANT PROJECT HISTORY

Please provide three (3) examples of project history from the past five (5) years, including project details such as:

- Client details
- Location and site details
- Scope of work and services provided
- Outcome achieved
- Project staff, including experience and role in project

APPENDIX D: PROJECT REFERENCES

Please provide three (3) project references for the projects noted in Appendix C.

Reference Name	Company Name	Phone Number	Email Address
Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.