

Recreation Energy Conservation Pre-Qualified Program Ally Requirements

The following requirements detail the information, process and criteria involved in becoming a Pre-Qualified Program Ally and delivering Scoping Audits and Engineering Studies for the Recreation Energy Conservation (REC) program.

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MCCAC
Municipal Climate Change Action Centre

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1.0 Program Overview

The Recreation Energy Conservation (REC) program helps municipally-owned recreation facilities reduce energy use and GHG emissions by providing financial rebates 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 on-boarding criteria used by the Municipal Climate Change Action Centre (MCCAC) to pre-qualify candidate Program Allies to deliver Scoping Audits and Engineering Studies as part of the REC program.

This pre-qualification process does not constitute as an agreement or contract between the Program Ally and MCCAC, nor does it guarantee work or funding. After review and approval of the pre-qualification submission, Program Allies may initiate and complete Scoping Audits and Engineering Studies through the REC program. Neither a Scoping Audit or Engineering Study should begin prior to a participating municipality signing off on a REC Offer Letter and agreeing to the Terms and Conditions of the REC program.

1.1 Scoping Audit Definition

Scoping Audits are energy audits with a level of analysis that falls between an ASHRAE (American Society for Heating Refrigerating, and Air-Conditioning Engineers) Level I or “walk-through audit” and an ASHRAE Level II, or an “investment grade audit”. Scoping Audits focus on identifying and estimating cost-saving and GHG reducing opportunities which will include several low or no cost opportunities and may include more capital-intensive opportunities. Scoping Audits provide direction and a base-level understanding of energy-saving opportunities within a facility and provide the necessary resources to prioritize and target these opportunities through an Implementation Project. Scoping Audits must be completed by an approved Program Ally. Program Allies should consult with the municipality to identify any specific energy-saving measures the municipality wants included in the Scoping Audit.

1.2 Engineering Study Definition

Engineering Studies are comprehensive, investment-grade reports which analyze the feasibility of large capital energy efficiency projects. Engineering Studies will include in-depth analysis on GHG reductions, and project economics, over the life of the equipment. Engineering Studies help give greater certainty on the performance of a proposed retrofit project. Engineering Studies must be completed by an approved Program Ally. Program Allies should consult with the municipality to identify any specific energy-saving measures the municipality wants included in the Engineering Study.

2.0 Steps to Become a Pre-Qualified Program Ally

2.1 Pre-Qualification Process

Program Allies are services and specialized equipment firms that provide scoping audits and engineering studies focused on greenhouse gas reductions. Organization types may include engineering firms, and vendors and installers of high-efficiency industrial and commercial equipment. These professionals assist business customers in learning about energy efficiency opportunities, types of upgrades, and rebates with the goal of helping customers

save energy and money.

The MCCAC hosts the REC Program Allies List with contact information for all Program Allies on the REC web page. Municipalities interested in completing a Scoping Audit and/or Engineering Study through REC must contact a Program Ally from the REC Program Allies List to begin this work. Any Scoping Audit or Engineering Study completed by non-Program Ally firms will not be eligible for REC funding. Municipalities must receive a quote and execute an Offer Letter with the MCCAC before a Scoping Audit or Engineering Study can begin and will not receive rebates until after the Scoping Audit or Engineering Study is complete.

The following steps outline the process required to become a Program Ally in the REC program:

1. **Review of Requirements** – Review the Pre-Qualified Program Ally Requirements, the REC Engineering Guidelines, and the REC Guidebook.
2. **Submit a Response** – Submit a written response that meets the requirements outlined in Section 3 below which includes, but is not limited to a capability profile, copies of previous technical audits, areas of expertise, and certificate of insurance. Please submit all responses and any supporting documentation via email to contact@mccac.ca. The submission acceptance window may close without notice. **Only one submission per consulting firm will be accepted.**
3. **MCCAC Review** – The MCCAC will review and follow up on responses on a first-come, first-served basis. The MCCAC may seek clarification on any component of the submission.
4. **Acceptance and Listing to Website** – The MCCAC will inform the accepted candidate program ally and list their name and contact information on the REC web page. At that time, municipalities may engage with the Program Ally to receive quotes and conduct Scoping Audits and/or Engineering Studies.

3.0 Submission Requirements and Criteria

The MCCAC invites candidates to prepare and send a written submission detailing their experience, expertise, approach, and ability to deliver high quality Scoping Audits and Engineering Studies as aligned under Sections 3.1 through 3.5.

Each submission must include the following contact information and clearly state the appropriate contact information to be provided on the REC Program Allies List after pre-qualification:

- Legal business name
- Office address, city, province, postal code
- Mailing address, city, province, postal code, if different than above
- Primary contact name, phone number, email address
- General business email address and phone number

Candidate Program Allies must demonstrate a high level of diligence in performing Scoping Audits and Engineering Studies and follow the reporting rules as established in the Engineering Guidelines. By applying through the pre-qualification process, Program Allies warrant that they hold all necessary licenses and proper certifications from all appropriate

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. Non-compliance to these rules or the level of rigour required by the Engineering Guidelines may result in Program Allies being removed from the REC Program Allies List.

3.1 Qualifications and Experience

- Provide a brief corporate profile description including the corporation's name, address, office locations (must have an office in the Province of Alberta), and an organization chart including sister companies or affiliated organizations that may be involved in the Scoping Audit and Engineering Study work.
- List the team members, their professional qualifications, and their role in delivering Scoping Audits and/or Engineering Studies. Scoping Audits and Engineering Studies must be completed by qualified professionals with a legal right to work in Canada such as a Professional Engineer (P.Eng), a Certified Energy Manager (CEM), or a Certified Energy Auditor (CEA).
- Describe other key resources you intend to leverage to complete the Scoping Audit and Engineering Study projects.

3.2 List of Requirements for Scoping Audits

Candidate Program Allies must submit each of the following in addition to the application:

- An estimated turnaround time and timeline with all required tasks.
- Copies of Scoping Audits (or equivalent ASHRAE between Level 1 or Level 2 audits) performed by the candidate Program Ally within the past 12 months in Canada on a commercial building.
- Certificates of Insurance meeting the minimum requirements below (Section 4.2).
- Capabilities Profile. The Capabilities Profile should include the following and should not exceed five pages:
 - Itemized list of technical services and any areas of specialty your company provides.
 - Describe the experience of each person who will be providing the service and preparing the reports. Include licenses, registrations or other certifications.
 - Provide a list of staff billable rates you charge to perform the above described services.
 - Provide three references. Include name, title, company, address, telephone number and brief description of related work performed.

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

3.3 List of Requirements for Engineering Studies

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

- An estimated turnaround time and timeline with all required tasks.
- Copies of Engineering Studies detailing the work performed by candidate Program Ally within the past 24 months in Canada.
- Certificates of Insurance meeting the minimum requirements below (Section 4.2)

- Capabilities Profile. The Capabilities Profile should include the following and should not exceed five pages:
 - Itemize any areas of specialty that have been completed under detailed engineering assessment and study
 - Describe the experience of individuals performing the engineering studies and preparing subsequent reports. This includes licenses, registrations and any applicable certifications.
 - Provide a list of staff billable rates you charge to perform the above described services.
 - Provide three references. Include name, title, company, address, telephone number and brief description of related work performed.

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.

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

3.4 Client Satisfaction

- Describe your approach to achieving high customer satisfaction.
- Describe dispute resolution techniques used to solve customer complaints or issues.
- Describe how municipal-specific information will be protected and not used for any purposes other than completing the Scoping Audit or Engineering Study.

3.5 Pricing

- Describe the approach, factors, values, and rationale used to quote a Scoping Audit and Engineering Study.
- Provide a pricing narrative that demonstrates knowledge of the costs required to deliver a Scoping Audit and Engineering Study service.

4.0 General Information

4.1 Selection

Successful Program Allies will have their contact information on MCCAC's REC Program Ally List for interested municipalities to contact when they wish to proceed with a Scoping Audit and/or Engineering Study. The pre-qualification process does not constitute an agreement between the Program Ally and the MCCAC or any other affiliated party. Program Allies are not guaranteed work or any payment if they are approved to be listed.

MCCAC is not obligated to pre-qualify any candidate. No obligations or legal relations shall exist between the MCCAC and successful or rejected Program Allies.

MCCAC reserves the right, in its sole discretion, to accept or reject any or all applications in whole or in part, or to waive any minor irregularities or informalities in a submission.

4.2 Payments

In all cases, the MCCAC will enter into a Funding Agreement with the Municipality which upon execution will act as a pre-approval for the work to begin. All funding will be issued to the participating Municipality after project completion. The MCCAC will not, in any scenario,

directly pay Program Allies for the completion of any Scoping Audits or Engineering Studies. All payments to Program Allies must be completed by the participating Municipality.

No payment will be made by the MCCAC for the costs incurred in the preparation or submission of this pre-qualification document.

4.3 Required Insurance

Submissions are required to include proof of insurance as outlined below. Coverage held by the Candidate is for the sole use and protection of the Candidate.

- Workers Compensation coverage in accordance with the Province of Alberta and local requirements.
- Commercial General Liability Insurance, including bodily injury, property damage, personal injury in an amount not less than \$1 million per occurrence.
- Professional Liability, Errors and Omissions insurance in an amount not less than \$1,000,000 per claim.

4.4 Removal

The MCCAC at its sole discretion reserves the right to remove any Program Ally from the REC Program Allies List without notice. Non-compliance to the REC Engineering Guidelines may result in a Program Ally being removed from the REC Program Allies List.

Examples of non-compliance include, but are not limited to:

- 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 a reasonable timeframe.
- Failure to follow safety rules while performing work at the site.
- Submitting Scoping Audits / Engineering Studies for review without supporting documents.
- Breach of Confidentiality Agreement(s).
- Any reports of complaints or repeated inconvenience caused to customers.
- Attempts to co-brand or act as direct sponsors for the Recreation Energy Conservation Program on behalf of MCCAC without written consent or approval.

Contact Us

Questions about the REC program may be directed to:

Municipal Climate Change Action Centre
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