

# PROGRAM ALLY ONBOARDING REQUIREMENTS

**April 2024**

The following requirements detail the information, process and criteria involved in becoming a Program Ally and delivering energy audits through MCCAC funded Programs.



**Municipal  
Climate Change  
Action Centre**

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## 1.0 Program Overview

The Community Energy Conservation (CEC) program and Municipal Energy Manager (MEM) program help municipally owned facilities reduce energy use and GHG emissions by providing financial rebates to help identify energy-saving opportunities and implement energy-saving projects. Through the respective MCCAC Programs, municipalities can receive rebates for energy audits that support investment decisions in addition to retrofit project rebates for implementing energy efficient retrofits in their facilities. This document provides detailed information on the process and the onboarding criteria used by the Action Centre to pre-qualify candidate Program Allies to deliver energy audits as part of the respective MCCAC Programs.

## 2.0 Steps to Become a Program Ally

### 2.1 Pre-Qualification Process

The Action Centre hosts a directory of Program Allies and their contact information on the CEC and MEM program web pages. Municipalities interested in completing an energy audit through either Program are encouraged to contact a contractor from the Program Allies Directory to begin this work. Energy audits can only be conducted by actively listed Program Allies. Municipalities must apply and sign a Funding Agreement prior to any work starting to maintain eligibility for energy audit funding.

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

1. **Review of Requirements** – Review the Energy Audit Requirements document, Program Ally Terms and Conditions, Program Ally Application, and Program Ally Escalation Framework.
2. **Submit an Application** – Candidate Program Allies will submit a written application form and additional appendices which demonstrates that they understand the objectives of the respective MCCAC program, that the candidate has extensive experience assessing building energy use, demonstrates a clear understanding of the performance of energy-saving technologies and the benefits of conserving energy, and are well-versed in the methods of energy auditing. In addition to the technical understanding of building systems, candidates must also demonstrate experience in financial analysis of implementing energy efficiency measures, greenhouse gas and energy savings measurement, quantification, reporting, and other forms of analysis covered in this document.

Please submit the application and supporting appendices via email to [contact@mccac.ca](mailto:contact@mccac.ca). The submission acceptance window may close without notice. **Only one submission per candidate Program Ally will be reviewed. Resubmissions will not be accepted.**

3. **MCCAC Review** – The Action Centre will review and follow up on responses on a first-come, first-served basis. The Action Centre may seek clarification on any component of the submission.
4. **Acceptance and Listing to Website** – The Action Centre will inform accepted Program Allies of approval and list their name and contact information on the Program Allies Directory. At that time, municipalities may engage the accepted Program Ally for energy audit work.

## 3.0 Submission Requirements and Criteria

The Action Centre invites candidate Program Allies to prepare and send a written Application detailing their contact information, experience, qualifications, approach, client satisfaction and ability to deliver high quality energy audits as outlined in Sections 3.1 through 3.5.

Candidate Program Allies should refer to the Energy Audit Requirements document to demonstrate that they understand the scope, program eligibility, audit structure, content requirements, and application process.

Program Allies must demonstrate a high level of diligence in performing energy audits and follow the reporting rules as established in the Energy Audit Requirements document.

All reports and energy audit work must be completed or supervised by a Professional Engineer (P.Eng) registered in the province of Alberta, a Certified Energy Manager (CEM) or Certified Energy Auditor (CEA) in good standing with the Association of Energy Engineers. Each submission must include the following information that will be listed on the Program Allies Directory 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, job title
- General business email address and phone number

### **3.1 Qualifications and Experience**

- Provide a brief corporate profile description, including the corporation's name, address, office locations, and an organization chart, including sister companies or affiliated organizations that may be involved in completing energy audit work through the respective MCCAC Program.
- Provide details of corporate experience providing energy analysis, business case analysis, financial assessments, and recommendations in the context of energy retrofits, including a narrative to explain how this experience will be leveraged for energy audits within the respective MCCAC Program.
- List the team members, their professional qualifications, and their role in delivering energy audits. A combination of equivalent experience and demonstrated knowledge may be considered in the absence of these designations described in Section 3 and will be evaluated and approved on a case-by-case basis.
- Describe other key resources you intend to leverage to complete energy audits.

### **3.2 Delivery Approach**

- Provide an estimated average project turnaround time and timeline with all required tasks.
- Describe your intended approach to initiating, planning, and completing energy audits. The approach should include the following components at a minimum:
  - Review of existing energy systems, utility bill analysis, and an energy end-use breakdown.
  - Recommending energy measure replacement options based on the municipality's needs and other information from the baseline energy measure inventory.
  - Economic analysis, including cost savings, comparing baseline measures to recommended energy conservation measure replacements.
  - Greenhouse gas emission analysis (including energy savings) comparing baseline measures to recommended energy conservation measure replacements.
- List all additional assumptions and sources of data to be used beyond what is listed in the energy audit Requirements, as applicable.

### **3.3 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 energy audit.

### **3.4 Pricing**

- Describe the approach, factors, values, and rationale used to quote an energy audit.
- Provide a pricing narrative that demonstrates knowledge of the costs required to deliver energy audits.

### 3.5 References and Appendices

Submissions should include at least three examples of projects completed in the past five years and include project details such as client details, location details, scope of work, project team, and project references. Submissions should also include at least one previously completed ASHRAE level 2 or 3 equivalent report that was completed within the last 3 years. Client data may be removed as necessary.

## 4.0 General Information

### 4.1 Participation in MCCAC Programs

Successful Program Allies will have their contact information listed on the Action Centre's Program Allies Directory for interested municipalities to contact when they wish to gather quotes for an energy audit application. The pre-qualification process does not constitute an agreement between the Program Ally and the Action Centre. The Program Ally is not guaranteed work or any payment if they are approved to be listed.

In all cases, the Action Centre will enter into a Funding Agreement with the municipality, which upon execution will act as a pre-approval for energy audit work. **Program Allies may only undertake energy audits after their municipal client receives a dually signed Funding Agreement.**

### 4.2 Payments

All funding will be issued to the participating municipality after project completion. The Action Centre will not, in any scenario, directly pay Program Allies for the completion of energy audits. All payments to Program Allies must be completed by the participating municipality. No payment will be made by the Action Centre for the costs incurred in the preparation or submission of this pre-qualification submission.

### 4.3 Required Insurance

Submissions are required to include proof of the following:

- Workers Compensation coverage in accordance with the Province of Alberta and local requirements. The Candidate shall deliver a certificate from the Workers' Compensation Board showing that the Candidate is registered and in good standing with the Board.
- 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 \$1 million inclusive per occurrence.
- The Program Ally must hold and maintain errors and omissions insurance, in accordance with the Alberta Insurance Act, in an amount not less than \$500,000 per claim insuring its liability resulting from errors and omissions in the performance of its services related to any MCCAC program initiatives. This insurance is required to remain in place for a period of 12 months following the completion of services related to the respective MCCAC program initiatives.

### 4.4 Selection

The Action Centre 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.

The Action Centre is not obligated to pre-qualify any candidate Program Allies. No selection resulting from this onboarding will be considered a commitment and no obligations or legal relations shall exist between the Action Centre and successful or rejected Program Allies.

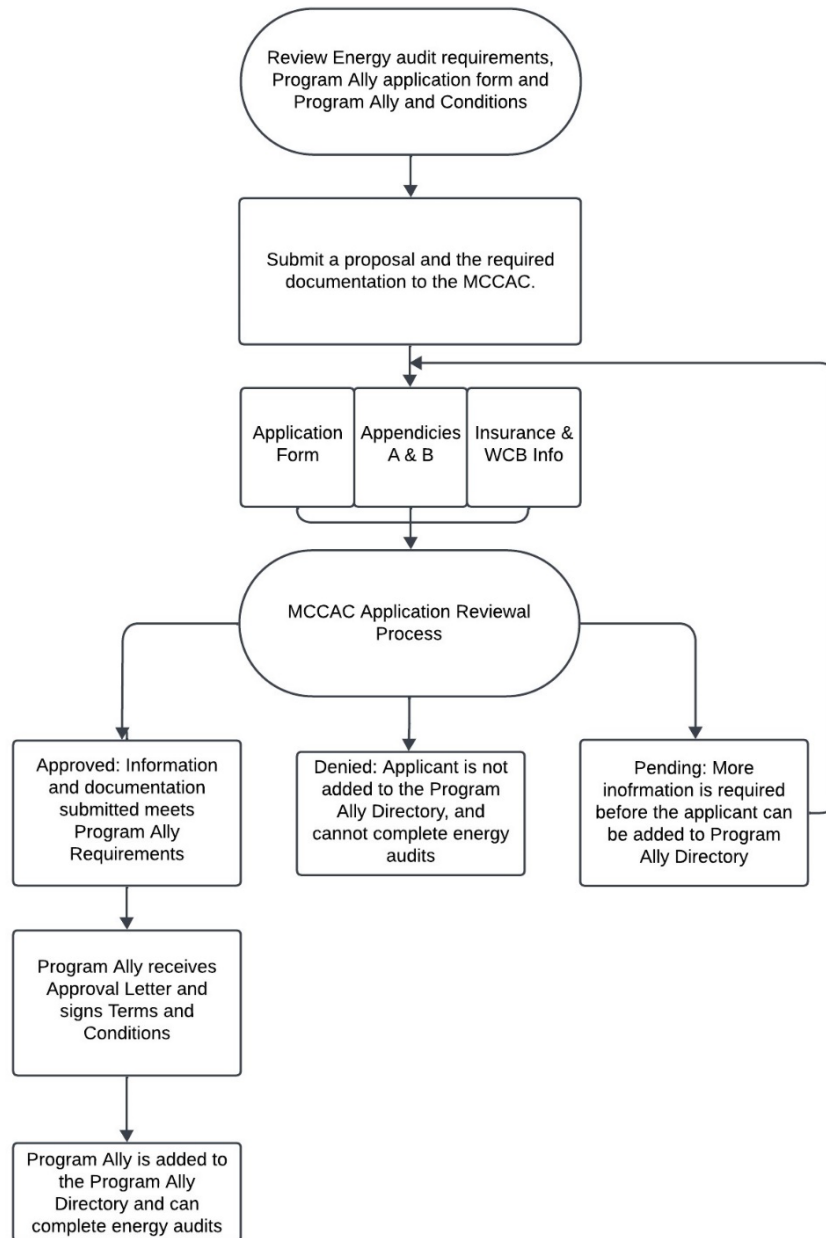
### 4.5 Removal

The Action Centre at its sole discretion reserves the right to remove any Program Ally from the Program Allies Directory without notice. Non-compliance to the Energy Audit Requirements document may result in a Program Ally being removed from the Program Allies List. In most cases, the Action Centre will work collaboratively with the Program Ally and follow the documented Program Ally Escalation Framework to resolve issues. More detail can be found in the Program Ally Terms and Conditions.

Examples of Non-Compliance (not limited):

- Use of faulty metering equipment to establish baseline energy use;
- Attempts to over report savings without providing necessary details;
- Failure to respond to queries and requests for information in a reasonable manner;
- Undertaking work without prior experience;
- Failure to follow safety rules while performing work onsite;
- Submitting energy audits for review without supporting documents;
- Poor performance or failure to abide by the Energy Audit Requirements;
- Breach of any confidentiality agreement(s) with respective MCCAC program participants;
- Poor customer service and management of projects;
- Any reports of complaints or repeated inconvenience caused to respective MCCAC program participants;
- Attempts to co-brand or act as direct sponsors for the respective MCCAC program on behalf of the Action Centre without prior written consent or approval.

## 5.0 Onboarding Process Flow



### Contact Us

Questions about MCCAC programs may be directed to:

Municipal Climate Change Action Centre  
300-8616 51 Avenue  
Edmonton, AB T6E 6E6  
780.433.4431  
contact@mccac.ca