

## REC Application Documentation Guidelines – Scoping Audits and Engineering Studies

### MCCAC – Recreation Energy Conservation (REC) Program

All documents must be submitted through the REC Program Portal unless otherwise noted.

Stage	Doc. ID	Requirement	Document Required	Naming Convention <i>Note: This convention must be used when submitting documents. An EA # will be assigned be created once you start the application process.</i>	File Type accepted	Description
Stage 1: Application Submission	1-a	Mandatory	Quote	EA_quote_YYYYMMDD	Pdf, jpeg, png	A copy of the Scoping Audit or Engineering Study quote from an approved REC Program Ally which meets the REC Engineering Requirements available on the <a href="#">REC Program webpage</a> .
	1-b	Mandatory	Utility Data	EA_utility data_ YYYYMMDD	PDF, excel	<b>For Scoping Audits:</b> A minimum of 12 months of utility consumption data that reflects standard operations (ie. prior to March 2020) or the most recent 24 months. This must include all sources of fuel (e.g. Electricity, Natural Gas). This must contain consumption and billing data. <b>For Engineering Studies:</b> A minimum of 12 months of utility consumption data that reflects standard operations (ie. prior to March 2020) or the most recent 24 months. This must include all sources of fuel (e.g. Electricity, Natural Gas). This must contain consumption and billing data.
	1-c	Mandatory	Utility Bills	EA_utility bills_ description_ YYYYMMDD  Example: EA_utility bills_ electricity_ 20201124	PDF	A minimum of 6 months of actual utility bills from utility providers must be supplied to support the data provided in Document 1-b (Utility Data). A minimum of 6 months of bills must be supplied for each source of fuel (e.g. Electricity, Natural Gas). The service address on the bills must match the facility address for the application.
	1-d	If Applicable	Evidence of External Funding	EA_external funding_ YYYYMMDD	PDF	If you have received any other funding for this project, please include all relevant information including the source of funding and the total amount with your submission
Stage 2: Offer Acceptance	2-a	Mandatory	Offer Acceptance	EA-XXXX_offer acceptance_ YYYYMMDD	PDF	The offer letter must be signed by two individuals representing the municipality with appropriate signing authority or by a designated officer acting alone if so authorized by council. If the estimated completion date differs from what is stated on page 1 of the offer letter, an updated start and end date must be entered in the appropriate space on page 2 of the offer letter.  Per the REC Program Terms and Conditions, as well as the REC Program Guidebook (both available on the <a href="#">REC Program webpage</a> ) no work should begin prior to the signed Offer Acceptance being submitted to the REC Program Portal. If work does begin prior to submitting your Offer Acceptance, there is a risk of your project not being funded. Once the signed Offer Acceptance has been received by the REC Program team, you will receive a confirmation email. At that point, you may begin the work.  <b>Note: Pages 3 and 4 of this document are for the Payment Request and do not need to be submitted until the study or audit is complete and payment is being requested for the application (See Stage 4: Payment Request)</b>
	2-b	If Applicable	Updated Scope of Work	EA-XXXX_scope change_ YYYYMMDD	Pdf, jpeg, png, word, excel	Any changes to the scope of work must be supplied via email to <a href="mailto:REC@cleareresult.com">REC@cleareresult.com</a> as soon as possible and any such changes must be approved by the MCCAC in writing. Not informing the Program of changes to the scope of work may result in the project not receiving funding. Depending on the changes, additional details may be required upon request.

Stage 3: Report Approval	3-a	Mandatory	Scoping Audit Report OR Engineering Study Report	EA-XXXX_scoping audit report_YYYYMMDD OR EA-XXXX_engineering study report_YYYYMMDD	Pdf	Please see the REC Scoping Audit and Engineering Study Requirements on the <a href="#">REC Program webpage</a> for details on what must be included in the report.  Please submit this item via email to <a href="mailto:REC@clearesult.com">REC@clearesult.com</a>
	3-b	Mandatory	Supporting Calculations	EA-XXXX_calculations_YYYYMMDD	MS Excel, other editable formats	Please see the REC Scoping Audit and Engineering Study Requirements on the <a href="#">REC Program webpage</a> for details on what must be included in the calculations.  Please submit this item via email to <a href="mailto:REC@clearesult.com">REC@clearesult.com</a>
	3-c	If Applicable	Updated Scope of Work	EA-XXXX_scope change_YYYYMMDD	Pdf, jpeg, png, word, excel	A description of the changes must be supplied via email. Depending on the changes, additional details may be required upon request.  Please submit this item via email to <a href="mailto:REC@clearesult.com">REC@clearesult.com</a>
	3-d	Optional	Checklist	EA-XXXX_checklist_YYYYMMDD	Pdf, jpeg, png	A completed checklist can be submitted to ensure all REC Scoping Audit and Engineering Study Requirements are fulfilled in the report.  Please submit this item via email to <a href="mailto:REC@clearesult.com">REC@clearesult.com</a>
Stage 4: Payment Request	3-c	Mandatory	Proof of Payment	EA-XXXX_proof of payment_YYYYMMDD	Pdf, jpeg, png	The following document types are accepted as evidence of payment: <ul style="list-style-type: none"> <li>Account Payable (AP) records</li> <li>Copies of cheques</li> </ul> All documents must be signed by an individual representing the municipality with appropriate signing authority. The document should reference the application number.  <b>Note: If the above formats are not available, you must contact <a href="mailto:REC@clearesult.com">REC@clearesult.com</a> to obtain approval for any exceptions. Approval is not guaranteed.</b>
	3-d	Mandatory	Invoice(s)	EA-XXXX_invoice #_YYYYMMDD  Example: EA-9999_invoice 1_20201124	Pdf, jpeg, png	The invoice(s) must be signed by an individual representing the municipality with appropriate signing authority.  <b>Note 1: The document provided must clearly describe the item(s)/service(s) purchased, the dollar value and the date.</b> <b>Note 2: If the document includes multiple items, items relevant to the application must be highlighted</b> <b>Note 3: If the above formats are not available, you must contact <a href="mailto:REC@clearesult.com">REC@clearesult.com</a> to obtain approval for any exceptions. Approval is not guaranteed.</b>
	3-e	Mandatory	Online Survey	N/A	N/A	All questions on the REC Program Survey should be answered to the best of your ability. Completion of the online survey will be verified by the MCCAC.
	3-f	Mandatory	Payment Request Form	EA-XXXX_signed payment request form_YYYYMMDD	Pdf, jpeg, png	The signed payment request pages of the Offer Letter (pages 3 & 4) provides acknowledgement to the REC delivery team that the Scoping Audit or Engineering Study is complete. The Payment Request Form must be signed by an individual representing the municipality with signing authority. If the payee information is different from what was submitted in the application, please complete and submit page 5 of the Offer Letter as well.