

# RECREATION ENERGY CONSERVATION PROGRAM

## Program Ally Onboarding Requirements

November 2020

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



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 onboarding criteria used by the Action Centre to pre-qualify candidate Program Allies to deliver Scoping Audits and Engineering Studies as part of the REC program.

## 2.0 Steps to Become a Program Ally

### 2.1 Pre-Qualification Process

The Action Centre hosts a list of Program Allies and their contact information on the REC program web page. Municipalities interested in completing a Scoping Audit or Engineering Study through REC are encouraged to contact a contractor from the Program Allies List to begin this work. Scoping Audits and Engineering Studies can only be conducted by actively listed Program Allies. Municipalities must submit an application and execute an Offer Letter prior to any work starting to receive funding for the Scoping Audit or Engineering Study.

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

1. **Review of Requirements** – Review the [Scoping Audit & Engineering Study Requirements](#) document.
2. **Submit a Proposal** – Candidate Program Allies will submit a written proposal which demonstrates that they understand the objectives of the REC program, that the candidate has extensive experience assessing facility 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 recreation facility 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. In addition to the proposal, candidate Program Allies must include all relevant attachments as outlined in Sections 3 and 4 below.

Please submit the proposal and any supporting documentation 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 [REC Program Allies List](#). At that time, Municipalities may engage the accepted Program Ally for Scoping Audit or Engineering Study work.

## 3.0 Submission Requirements and Criteria

The Action Centre invites candidate Program Allies to prepare and send a written submission detailing their experience, expertise, approach, and ability to deliver high quality Scoping Audits and/or Engineering Studies as aligned under Sections 3.1 through 3.5.

Candidate Program Allies should refer to the [Scoping Audit and Engineering Study Requirements](#) to demonstrate that they understand the scope, program eligibility, audit and study structure, content requirements, and application process. 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 [Scoping Audit and Engineering Study Requirements](#).

All reports and work at the Scoping Audit level must be completed or supervised by a Professional Engineer (P.Eng) registered in the province of Alberta, or a Certified Energy Manager (CEM)/Certified Energy Auditor (CEA) in good standing with the Association of Energy Engineers. Companies licensed to complete engineering work in Alberta, including Engineering Studies through the REC program, must hold a Permit to Practice issued by the Association of Professional Engineers and Geoscientists of Alberta (APEGA), which can be verified by cross-referencing [APEGA's Permit Holder Directory](#). All Engineering Studies must be completed or reviewed and approved by a Professional Engineer (P.Eng) registered in the province of Alberta.

Each submission must include the following information that will be listed 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
- Ability to complete Scoping Audits and/or Engineering Studies (specifying if capabilities include one of two, such as Scoping Audits only)

### 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 Scoping Audit and/or Engineering Study work.
- 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 Scoping Audits and/or Engineering Studies in the REC program.
- List the team members, their professional qualifications, and their role in delivering Scoping Audits and/or Engineering Studies. 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.
- Provide an example of previously completed ASHRAE Level 2 or 3 equivalent reports. Client data may be removed as necessary.
- Describe other key resources you intend to leverage to complete Scoping Audit or Engineering Study projects.

### 3.2 Delivery Approach

- Provide an estimated project turnaround time and timeline with all required tasks.
- Describe your intended approach to initiating, planning, and completing Scoping Audits and/or Engineering Studies. 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 [Scoping Audit & Engineering Study 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 Scoping Audit or Engineering Study.

### 3.4 Pricing

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

### 3.5 References

Submissions should include a list of corporate references and contact information that accompany project examples and provide insight into the general reputation, skills, and qualifications of the candidate Program Ally. References are to be from clients for whom the candidate has previously delivered Scoping Audits and/or Engineering Studies.

## 4.0 General Information

### 4.1 Participation in REC

Successful Program Allies will have their contact information listed on the Action Centre's REC Program Allies 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 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 execute an Offer Letter with the Municipality, which upon execution will act as a pre-approval for Scoping Audit or Engineering Study work. **Program Allies may only undertake a Scoping Audit or Engineering Study after the Municipality receives, signs, and returns an Offer Letter.**

### 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 Scoping Audits or Engineering Studies. 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 \$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.

#### 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 List without notice. Non-compliance to the Scoping Audit & Engineering Study Requirements may result in a Program Ally being removed from the Program Allies List.

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 Scoping Audits and/or Engineering Studies for review without supporting documents;
- Poor performance or failure to abide by the Scoping Audit and Engineering Study Requirements;
- Breach of any confidentiality agreement(s) with REC program participants;
- Poor customer service and management of projects;
- 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 the Action Centre without prior written consent or approval.

## Contact Us

Questions about the REC program may be directed to:

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