

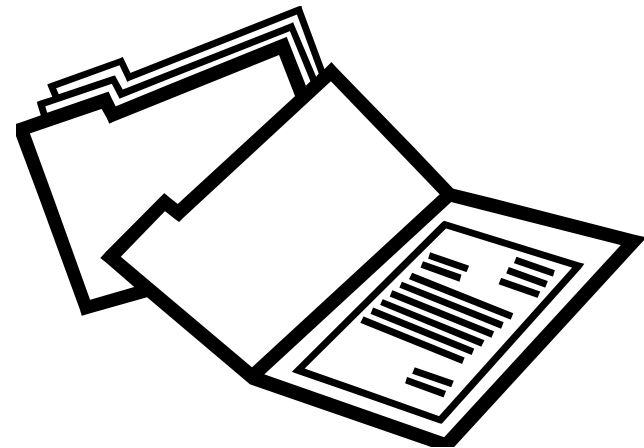
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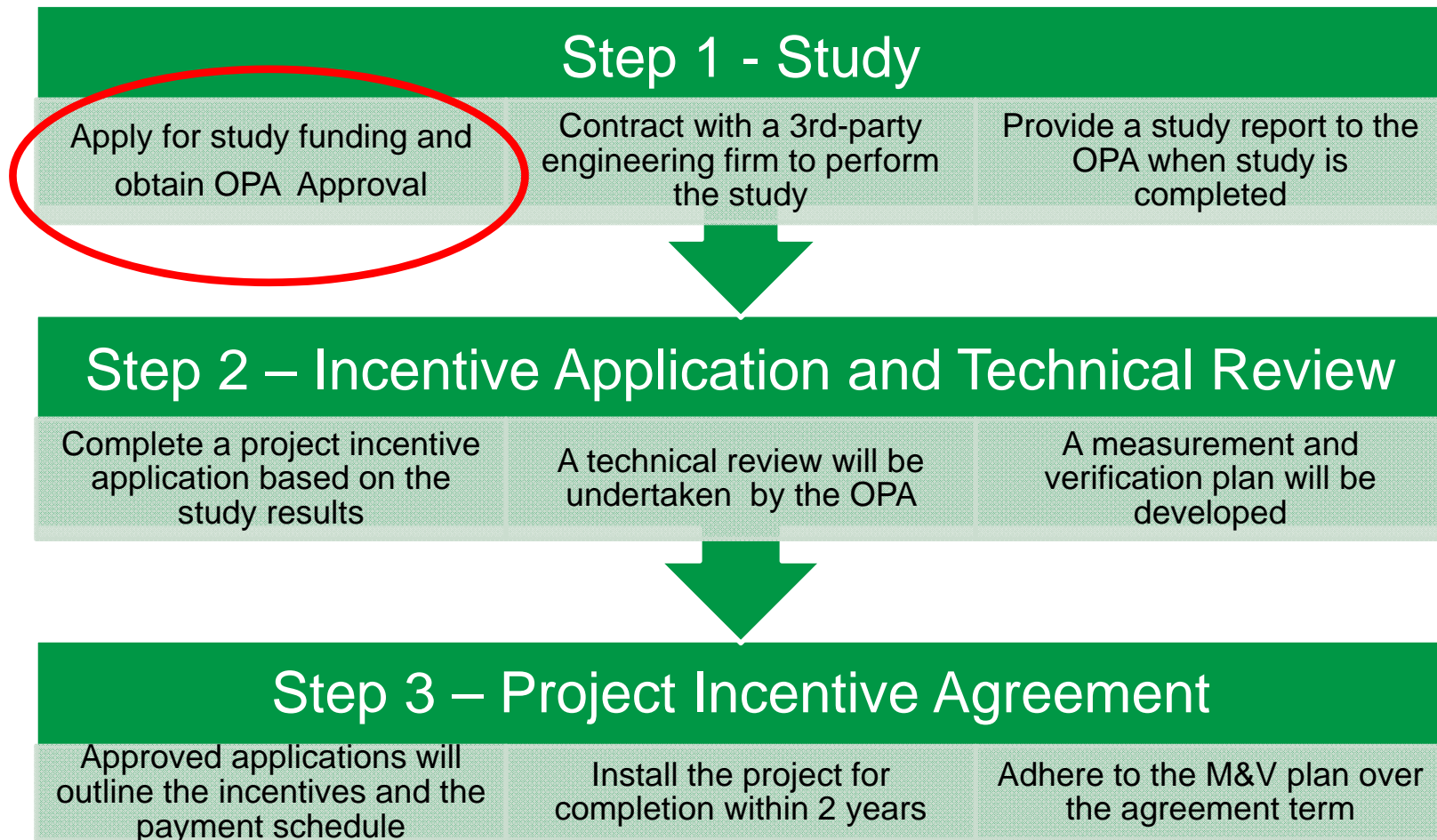
Proposal and Application Development

Proposal Development

1. The Application Process
2. Proposal Requirements



INDUSTRIAL ACCELERATOR PROCESS OVERVIEW



The Application Process

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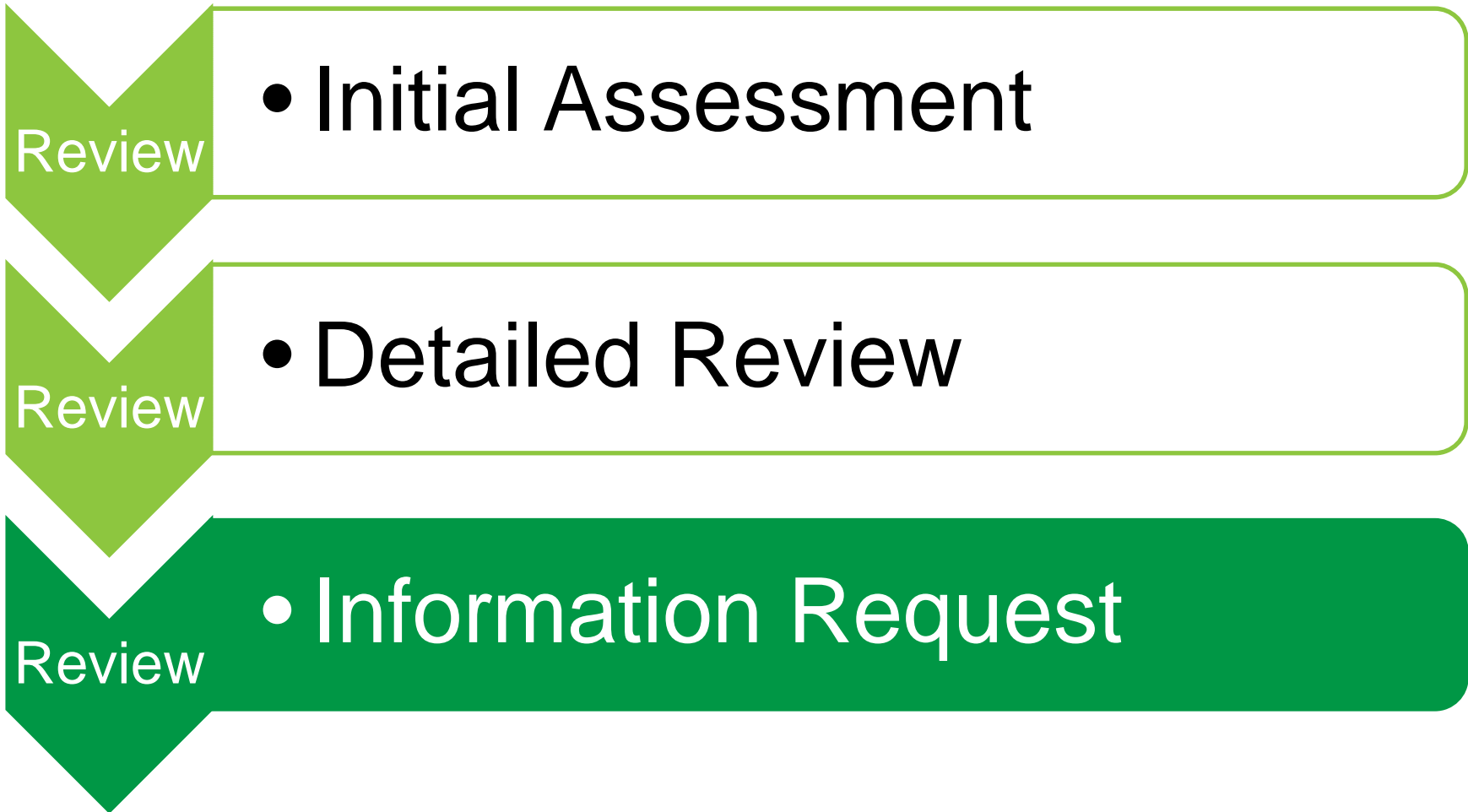
• Please read Program Rules before completing this application.

DETAILED ENGINEERING STUDY FUNDING APPLICATION	
For OPA Use only	
Identification #:	
KAM:	
CORPORATE INFORMATION	
Name of Company:	
Participant's name (if different):	
Corporate relationship between the two:	
Please indicate whether the Company owns or leases the Property:	<input type="checkbox"/> Owns <input type="checkbox"/> Leases
If there has been any change to corporate status since the first application to the Program please identify it here:	
PARTICIPANT INFORMATION	
Participant Information:	Contact Information:
Legal Name of Participant:	Primary Contact Name:
Additional Party for Credit Purposes, if applicable:	Title:
Canadian Corporate Head Office Address (Street):	Phone:
City:	Email:
Postal Code:	Fax:
GST/HST #:	Secondary Contact Name:
	Title:
	Phone:
	Email:
	Fax:

The Application Process

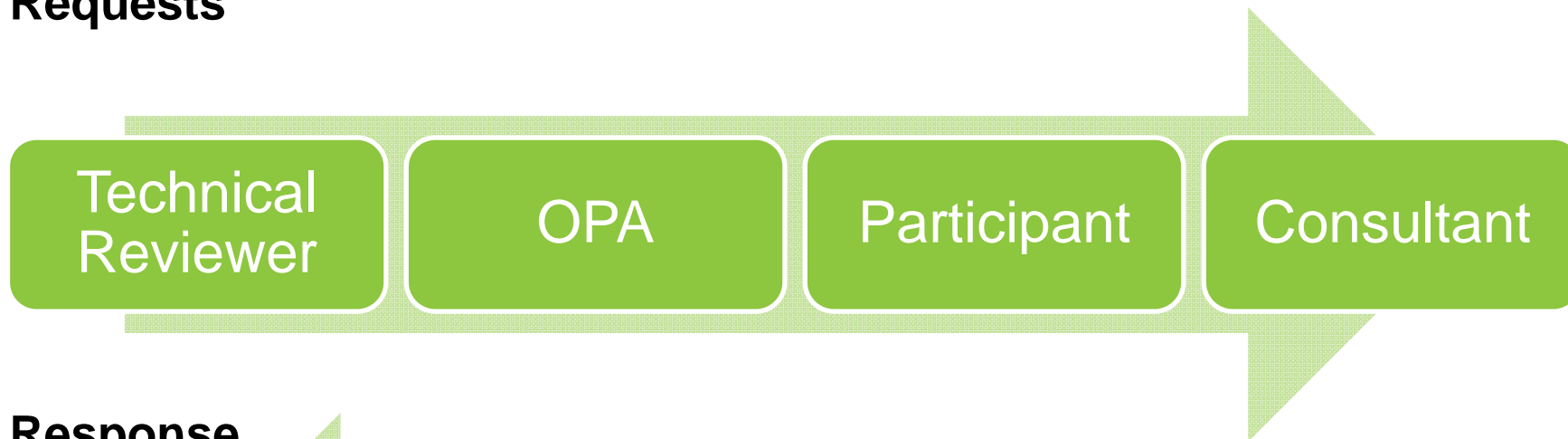
PROPOSED DETAILED ENGINEERING STUDY REQUEST									
Estimated Detailed Engineering Study cost:									
Proposed Study start date:				Proposed Study completion date:					
Is there a completed Preliminary Engineering Study?		<input type="checkbox"/>	Yes, with funding from OPA						
		<input type="checkbox"/>	Yes, without funding from OPA						
		<input type="checkbox"/>	No						
(If a Preliminary Engineering Study has been completed without funding, the report must be included with this application)									
A copy of the Consultant's Detailed Engineering Study proposal MUST be attached									
List of Industrial Systems for study funding: <i>(Attach and submit additional pages if necessary)</i>									
System #	Description of each Industrial System to be studied	Hours of Operation of the System [hours/year]	Annual Consumption of the System [MWh/year]	Estimated Annual Electricity Savings Potential [MWh/year]	Estimated Electricity Bill Savings (BS) [\$ /year]	Estimated Other Benefits (OB) [\$ /year]	Estimated Project Benefits (BS+OB) [\$ /year]	Estimated Eligible Costs [\$ /year]	Proposed Study Costs [\$ /year]
1									
2									
3									
4									
TOTAL									
Assumed Electricity Rate (\$/MWh):									
THIRD PARTY CONTRIBUTIONS									
Have you applied, or will you be applying for any other third party funding for the Project referred to in this application?							<input type="checkbox"/>	Yes	
							<input type="checkbox"/>	No	
Have you received any third party contributions or commitments for contributions? (Including contributions in kind)			<input type="checkbox"/>	Yes					
			<input type="checkbox"/>	No					
Amount of third party contributions or commitments:									
Source of third party contributions or commitments:									

The Application Process

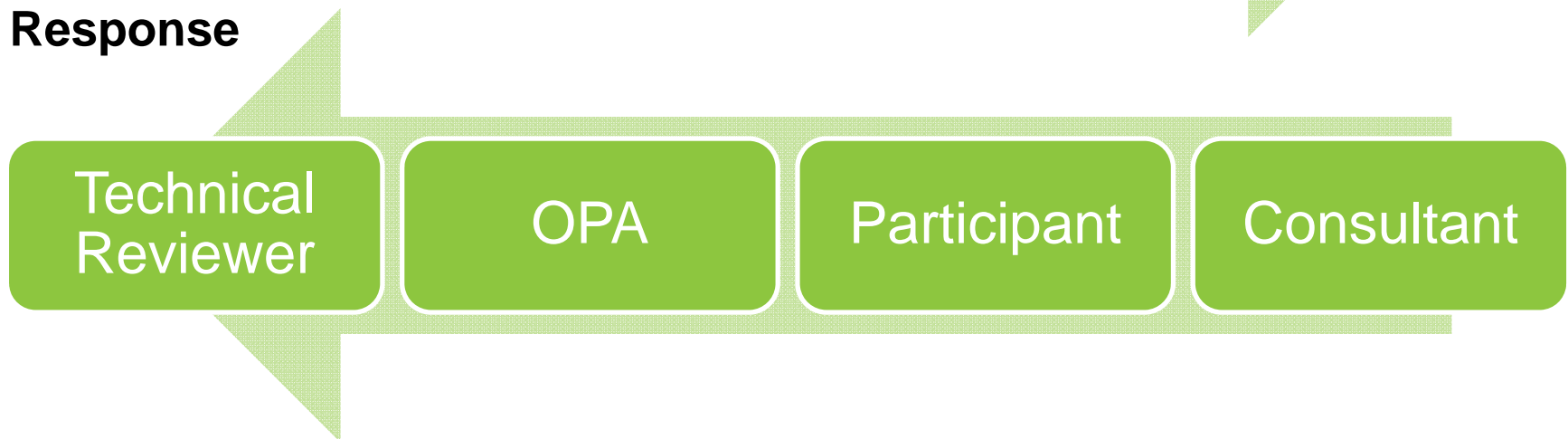


The Application Process – Information Requests

Requests



Response



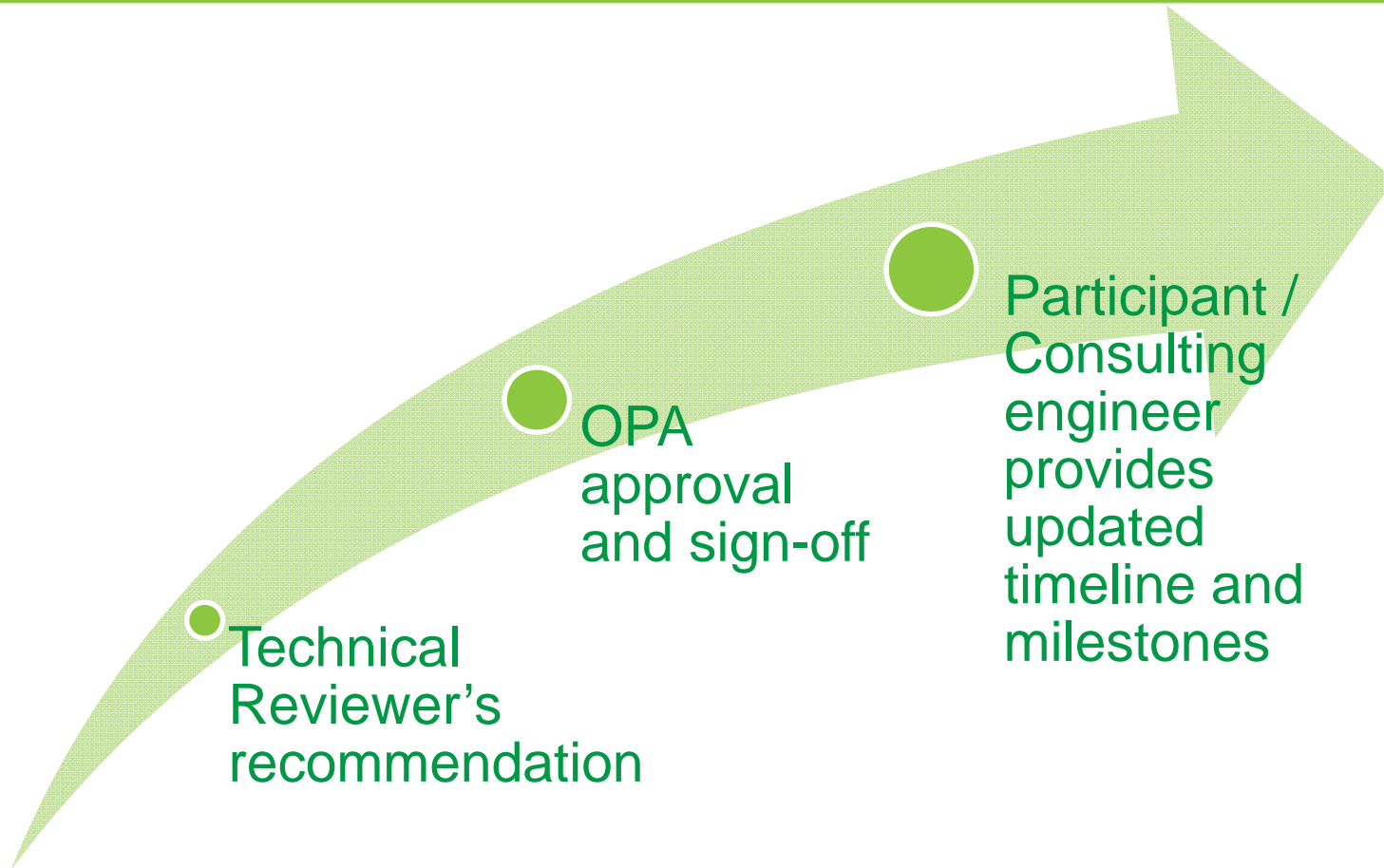
The Application Process – Information Requests

Tips:



- ❖ Error on the side of detail in responses (if information is available).
- ❖ Suggest conference calls once Requests are received, if clarification is needed.
- ❖ Use original Information Request document to respond to and address each relevant request or provide a reference to where the request is addressed.
- ❖ Avoid multiple rounds.

The Application Process – Application Approval

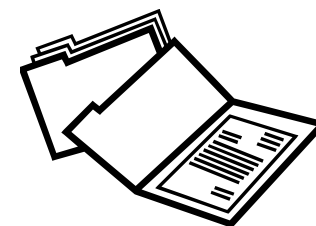


Targeted review time for a study Application is 30 calendar days

The Application Process


Building efficiencies into the Application process:

- ❖ Increase awareness and understanding of the Program
- ❖ Developing relationships and increasing familiarity
- ❖ Repetition of similar projects



Proposal Requirements

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PRELIMINARY ENGINEERING STUDY: PROPOSAL CHECKLIST

ESSENTIAL INFORMATION

1. Provide a brief description of the industrial system to be studied, why this system was chosen for study and how it will reduce electricity use.
[This could include approximate motor HP, hours of operation, control method (if any), annual electricity consumption of the industrial system, any pre-study estimates of electricity savings and project costs for each proposed electricity savings measure.]

2. Clearly define the study scope and deliverables, including a description of the methodology/approach that will be used to determine the electricity savings and capital costs for the electricity savings measure(s). (Reference: IAP Rules - Engineering Study Minimum Requirements - Exhibit A)
[This could include the final report, energy models, (such as spreadsheets), design drawings, data logs, etc. As well as the proposed approach for data collection and analysis.]

3. Ensure that the Proposal indicates that the report will provide electricity savings estimated to an accuracy of +/- 30%, and project costs estimated to an accuracy of +/- 50%.

SUPPORTING INFORMATION

4. Provide a breakdown of travel costs and other expenses. Please adhere to the Ontario Government's policy for consultants and expenses. *[For more information please visit www.doingbusiness.mgs.gov.on.ca.]*

5. Provide the engineering firm/consultant's general information.
[This could include legal business name, alternate names, contact information and primary contact person. Note that a Certificate of Authorization from PEO is required to offer consulting services in Ontario.]


6. Provide a proposed study timeline, schedule of effort and resource allocation for major tasks.
[This could include the following key milestones: study kick-off, draft report submission and final report submission.]

ADDITIONAL INFORMATION - DEPENDING ON NATURE OF SAVINGS MEASURE

7. Provide a description of the approach to be used to quantify the benefits associated with any non-energy benefits.
[This could include lower operating and maintenance costs.]

The INDUSTRIAL ACCELERATOR - PRELIMINARY ENGINEERING STUDY PROPOSAL CHECKLIST is provided only to assist you in preparing your applications for the Preliminary Engineering Study Proposals and is not binding on the OPA. The OPA is not required to accept applications that conform to this Checklist. The OPA may change, modify, amend or update the Industrial Accelerator Program at any time and without notice. While the OPA will endeavour to keep the Checklist current, the OPA cannot guarantee its accuracy or completeness. Please refer to the Preliminary Engineering Study Funding Contract or the Program Rules, as applicable, for the most up-to-date and binding terms and conditions. ^{OM} Official Marks of the Ontario Power Authority

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DETAILED ENGINEERING STUDY: PROPOSAL CHECKLIST

ESSENTIAL INFORMATION

1. Provide a brief description of the industrial system to be studied, why this system was chosen and how it will reduce electricity use.
[This could include approximate motor HP, hours of operation, control method (if any), annual electricity consumption of the industrial system, and any Preliminary Engineering Study estimates of electricity savings and project costs. Where applicable this section of the proposal could simply reference a previous study.]

2. Clearly define the study scope and deliverables, including a description of the methodology/approach that will be used to determine the electricity savings and capital costs for the electricity savings measure(s). (Reference: IAP Rules - Engineering Study Minimum Requirements - Exhibit B)
[This could include the final report, energy models, (such as spreadsheets), design drawings, data logs, etc. As well as the proposed approach for data collection and analysis.]

3. Provide a proposed "Baseline Methodology" including an acknowledgement that a Test Plan will be submitted in the early stage of the study. (Reference IA Program Rules Section 5.3)
[Although this is not strictly required as part of the proposal, it is a key part of the approval process, and addressing the baseline methodology will aid in the review.]

4. Ensure that the Proposal indicates that the report will provide electricity savings estimated to an accuracy of +/- 10%, and project costs estimated to an accuracy of +/- 25%.

SUPPORTING INFORMATION

5. Provide a breakdown of travel costs and other expenses. Please adhere to the Ontario Government's policy for consultants and expenses.
[For more information please visit www.doingbusiness.mgs.gov.on.ca.]

6. Provide the engineering firm/consultant's information.
[This could include legal business name, alternate names, contact information and primary contact person, as well as resumes of key technical staff that will contribute to the study, client references and/or examples of similar projects. Note that a Certificate of Authorization from the PEO is required to offer consulting services in Ontario.]

7. Provide a proposed timeline of major tasks, including a schedule of effort and resource allocations for each task aligned to the major tasks as proposed in the study timeline.
[This could include the following key milestones: study kick-off date, Base Case Baseline methodology submission, baseline metering equipment installation date, draft and final report submission.]

ADDITIONAL INFORMATION - DEPENDING ON NATURE OF SAVINGS MEASURE

8. Provide a description of the approach to be used to quantify the benefits associated with any non-energy benefits.
[This could include lower operating and maintenance costs.]

9. Provide a disclosure of any real or perceived conflict of interest for this project.

The INDUSTRIAL ACCELERATOR - DETAILED ENGINEERING STUDY PROPOSAL CHECKLIST is provided only to assist you in preparing your applications for the Detailed Engineering Study Proposals and is not binding on the OPA. The OPA is not required to accept applications that conform to this Checklist. The OPA may change, modify, amend or update the Industrial Accelerator Program at any time and without notice. While the OPA will endeavour to keep the Checklist current, the OPA cannot guarantee its accuracy or completeness. Please refer to the Detailed Engineering Study Funding Contract or the Program Rules, as applicable, for the most up-to-date and binding terms and conditions. ^{OM} Official Marks of the Ontario Power Authority

Proposal Requirements

The **Proposal Requirements Checklist** was created to provide guidance for the development of study proposals

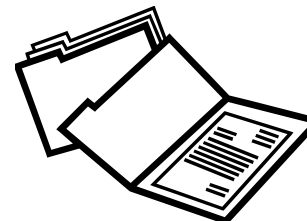
Essential Information:

- Describe the Industrial System to be studied
 - ❖ What does it do? How does it do it?
 - ❖ Horsepower, hours of operation, electricity consumption, etc.
- Explain why this system was chosen for study
 - ❖ Clear justification of the energy savings opportunity – What is the mechanism for energy savings?

Proposal Requirements

Essential Information:

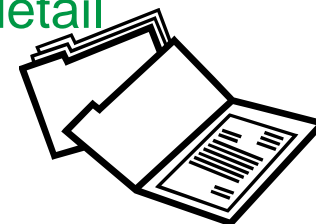
- Define the scope and goals of the study, acknowledging the study Minimum Requirements
 - ❖ Accuracy of Electricity Savings and project cost estimates
 - ❖ Acknowledge Section 5.3 of the IAP Rules – the Test Plan
 - Test Plan not required for Preliminary Engineering Studies
- Describe the methodology and tools that will be used to collect data, analyse data, and formulate recommendations



Proposal Requirements

Supporting Information:

- Provide a proposed timeline of tasks (e.g. Gantt chart)
- Service Costs:
 - ❖ Hourly billing rates for project personnel
 - ❖ Schedule of costs that shows sub-totals for time for each task
 - ❖ Schedule of travel costs and other expenses
 - ❖ Provide any sub-contractor costs to the same level of detail
- Identify Participant personnel to assist with the study



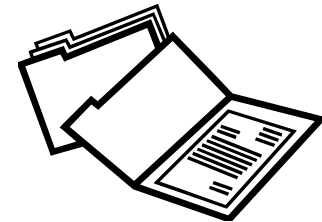
Proposal Requirements

Supporting Information:

- Indicate possession of a Certificate of Authorization from the Professional Engineers of Ontario
- Provide CV's and job titles for professional personnel.
- Provide references for project history

Additional Information:

- Disclose any conflicts of interest
 - ❖ Other commercial arrangements within the scope of the project



Proposal Requirements

Application Evaluation:

- The reasonableness of the study cost/incentive:
 - ❖ Relative to the estimated project costs
 - ❖ Relative to the estimated project benefits
- The quality of the proposal
 - ❖ Experience of the engineering team
 - ❖ Detail of the proposed study scope and schedule
 - ❖ Clarity of methodology

