



# ENERGY SAVINGS FOR BUSINESS

*Investing to keep businesses competitive*

## Program Guidebook

October 5, 2021

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## Introduction

On November 2, 2020, the Government of Alberta launched Energy Savings for Business (the Program), the largest per capita high-efficiency and onsite energy generation program targeting small- to medium-sized enterprises in the province to date. The Program officially opened to applications on February 1, 2021.

With up to \$55 million in funding available, the Program will help Alberta businesses decrease operating costs, grow operations, create skilled jobs, and boost economic recovery. The Program is anticipated to stimulate over \$196 million in new investment. As a short-term Program, incentives are available to eligible Alberta businesses and non-profits to encourage uptake of high-efficiency products and onsite energy generation measures. Up to \$250,000 is available per project, with up to \$1 million per parent company to help Alberta businesses invest in saving energy and money.

This Guidebook provides a comprehensive overview of the Program offered by Emission Reductions Alberta (ERA). It covers topics such as eligibility, the application process and will guide your participation in the Program as either an Eligible Contractor or Participant. You will also find tips on how to submit your application, important deadlines and detailed information about Eligible Expenses, including sample calculations. The Guidebook is an accompanying document to the Application Guide, the Participant Terms and Conditions, and the Contractor Code of Conduct, which are all available on the Program's webpage: [eralberta.ca/esb](http://eralberta.ca/esb). The Program specific definitions referred to in this document are available in the Participant Terms and Conditions.

***Please note that the Participant Terms and Conditions and Contractor Code of Conduct shall control and supersede any inconsistencies, conflicts, or ambiguities within the Guidebook.***

If you are unable to find an answer to your question in the Guidebook or require additional assistance, please contact the Program's dedicated contact centre, open Monday to Friday from 9 a.m. to 5 p.m. We are happy to help.

Email: [support@esbprogram.ca](mailto:support@esbprogram.ca)

Chat: via [eralberta.ca/esb](http://eralberta.ca/esb)

Toll-free: 844-407-0025



# 1. Eligibility Overview

The Program offers financial incentives to small- and medium-scale industrial and commercial Projects that install eligible commercially available emissions reduction technologies. For projects to be eligible, they must occur at Eligible Facilities located within Alberta, meet project timeline requirements, and follow the criteria outlined in the Participant Terms and Conditions.

## 1.1 Eligible Participants and Facilities

Participants	Facilities
<p><b>Eligible</b> Must meet the following three requirements:</p> <ol style="list-style-type: none"> <li>A Participant carries on a business. A business includes, but is not limited to: <ul style="list-style-type: none"> <li>non-profits</li> <li>co-operatives</li> <li>sole proprietorships</li> <li>partnerships</li> <li>corporations</li> </ul> </li> <li>The Participant is a privately owned entity and is <u>not</u> a Public Authority. <ul style="list-style-type: none"> <li>E.g., a Participant that is wholly owned by a Public Authority, such as a municipality, is not eligible.</li> </ul> </li> <li>The Participant receives 50 percent or less of its annual revenue from a Public Authority. <ul style="list-style-type: none"> <li>E.g., a Participant that receives 25 percent of their funding from a Public Authority is eligible.</li> <li>E.g., a non-profit or business owned by an Indigenous community is eligible if 50 percent or less of funding comes from a Public Authority. <i>If a not-for-profit has specific circumstances where they exceed the 50% of funding from a Public Authority, but would still want to apply, please contact support@esbprogram.ca.</i></li> </ul> </li> </ol>	<p><b>Eligible</b> Must meet the following six requirements:</p> <ol style="list-style-type: none"> <li>The facility is located in Alberta.</li> <li>The facility is owned or leased by the Participant. <ul style="list-style-type: none"> <li>If a Participant leases the facility, permission must be obtained from the landlord.</li> </ul> </li> <li>The facility has been in operation for one year or more. <ul style="list-style-type: none"> <li>Exemptions will be specified on the Eligible Measures List and in Section 4.2 (c) of the Participant Terms and Conditions.</li> </ul> </li> <li>The facility meets at least one of the following: <ul style="list-style-type: none"> <li>used solely for commercial or industrial purposes (the facility’s electricity rate class is “non-residential”), <ul style="list-style-type: none"> <li>E.g., a facility on farmland with a non-residential electricity rate class is eligible.</li> </ul> </li> <li>is comprised of only common areas of a multi-unit residential dwelling, or</li> <li>is a remote industrial facility with an applicable facility ID (e.g., Petrinex).</li> </ul> </li> <li>The facility is not a Large Emitter or has opted into the TIER Regulation at any time during the term of the Participant Acceptance.</li> <li>The facility will operate for the lifetime of the Measure.</li> </ol>

**Application Tip:** *If you are not sure if you or your facility are eligible, please reach out to the Program contact centre. The Program contact centre is available to assist you with your questions and inquiries.*



**Application Tip:** *If the facility is a multi-unit residential dwelling, please note that the following requirements exist:*

- *Facility must have at least 6 residential units*
- *There must be common conditioned (“indoor”) area such as stairwells, hallways, lobby, recreational centre etc.*
- *There must be a common front entrance for the residential units*

*There are additional restrictions specific to the measures being installed. Please contact [support@esbprogram.ca](mailto:support@esbprogram.ca) for the details.*

## 1.2 Eligible Projects

Eligible Projects must meet two conditions:

- 1) The project must contain Eligible Measures (measures that meet the requirements listed on the Measures List) and that the measures must be installed at an Eligible Facility (as explained above).
- 2) The Participant has not received an incentive already under the ESB program for the same measure. For example, if a Participant has two projects (A and B), and a measure is included in project A, the same measure can not be included again in Project B.

## 1.3 Eligible Contractors

All projects must assign one Eligible Contractor.

The Eligible Contractor can be an external third party, or internal to the business providing they have the appropriate qualifications under the Contractor Code of Conduct.

### Basic Contractor Requirements:

- Be a registered business in Alberta (have a valid business license),
- Have a current certificate from the Workers’ Compensation Board (WCB) or evidence of WCB exemption,
- Have commercial general liability insurance with at least \$2,000,000 for each occurrence, automobile insurance with at least \$2,000,000 liability and professional liability insurance with at least \$1,000,000 per claim, and
- Provide warranties for work on projects as applicable.

### Examples of types of contractors in the Program:

- Installers
- Manufacturers and distributors of energy efficient products, specifically those identified as eligible for Project Incentives
- Design, engineering, architectural firms, etc.

### 1.3.1 Specific Contractor Requirements

Due to the complexity of PV, CHP, and Geothermal Systems, these types of projects have additional requirements:

PV Systems	CHP Systems	Geothermal Systems
<p>Eligible Contractor is a member in good standing of either:</p> <ul style="list-style-type: none"> <li>• Solar Alberta (previously Solar Energy Society of Alberta (SESA)),</li> <li>• Canadian Renewable Energy Association (CanREA), or</li> <li>• Electrical Contractors Association of Alberta (ECAA).</li> </ul>	<ul style="list-style-type: none"> <li>• Eligible Projects must have the project designs approved by an experienced P.Eng with the appropriate insurance policies.</li> <li>• The Eligible Contractor is obligated to disclose the individual or organization and associated credentials meeting these requirements in association with Eligible Projects.</li> </ul>	<ul style="list-style-type: none"> <li>• Eligible Project designs must be approved by a P.Eng. having completed the Certified Geo Exchange Designer (CGD) course from the International Ground Source Heat Pump Association or equivalent.</li> <li>• Ground Source Heat Pump installers must have completed the Accredited Installer accreditation from the International Ground Source Heat Pump Association or equivalent.</li> <li>• The Eligible Contractor is obligated to disclose the individual or organization and associated credentials meeting these requirements in association with Eligible Projects</li> </ul>

For more details on contractor eligibility, business requirements or to review contractor expectations, please see the Contractor Code of Conduct on the Program website.

### 1.4 Eligible Measures

The Program has a range of Eligible Measures in the following category types:

- Compressed air
- Process heating
- Geothermal systems
- Refrigeration
- Food service
- HVAC
- Lighting controls
- Motors and drives
- Water heating
- PV systems (fully subscribed)
- Combined heat and power (CHP) systems
- Lighting systems
- Building envelope and windows
- Solar air heating
- Food service
- Agricultural lighting

Each Eligible Measure has specific requirements to be eligible for a Project Incentive. The details are available in the Eligible Measures List, which can be found on the Program website. The Program website includes additional resources such as Application Checklists, an Application Guide, and training videos about how to submit an Eligible Measure specific application on the Portal.

It should be noted that Eligible Measures must be new products and cannot be used, refurbished, or rebuilt. All Eligible Measures that are submitted for a Project Incentive must meet Canadian Certification Standards, and all required permits, licenses, approvals, and authorizations for installation are the responsibility of the Participant.

### 1.5 Additional Requirements for Combined Heat and Power Systems

In addition to all eligibility criteria listed in Section 1.4 in this Guidebook and Section 4.4 of the Participant Terms and Conditions, Combined Heat and Power (CHP) Systems must also meet the following requirements:

- Be a new installation, where “new” is defined as installations that have an interconnection approval from the electric distribution system signed no earlier than one year prior to the Pre-approval Submission date.
- The CHP system must be grid connected and compliant with the [Government of Alberta’s Micro-generation Regulation \(AR27/2008\)](#).
  - The project must be grid connected,
  - The size cannot exceed the load,
  - The greenhouse gas intensity must be less than or equal to 418 kg per MWh.
- The system must meet the following minimum performance standards for efficiency and utilization:
  - Minimum overall CHP system efficiency of 50%,
  - Minimum CHP system utilization factor of 85%,
  - All heat generated must be used within the facility.
- The system equipment must carry the following minimum warranty levels:
  - Two years *OR*
  - 6,000 hours, whichever comes first.
- To determine the incentive amount as outlined in the Measures List, the generator’s nameplate electrical output in kilowatts will be used. This will be cross-referenced against the specification sheets and other information submitted in the application.
- The CHP system should be designed and installed considering good engineering practices. The name of the professional engineer and their engineering firm is required to be included with the application.
- It should be noted that fuel cells are ineligible for the CHP incentive. Organic Rankine Cycle projects have a separate application process.

## 1.6 Additional Requirements for Geothermal Systems

In addition to the Eligible Measures requirements set out in Section 1.4 in this Guidebook and Section 4.4 of the Participant Terms and Conditions, Geothermal System projects must also meet the following requirements:

- The geothermal system must meet the following minimum performance and technical requirements:
  - All heat generated by the geothermal system project must be used within the facility
  - The geothermal system can only use the ground or groundwater for the geothermal exchange
- The geothermal system must be designed and installed by someone who has taken and has the certificate of completion for the *ANSI/CSA C448 Series, Design and installation of ground source heat pumps for commercial and residential buildings* course.
- To determine the incentive amount as outlined in the Measures List, the heat pump's nameplate rating in tons will be used. This will be cross-referenced against the specification sheets and other information submitted in the application.

## 1.7 New Construction

The ESB program is targeted towards existing buildings that may be considering energy saving upgrades. New construction projects are not included, as energy savings assumptions for the projects will be different, and often, the energy savings options are the default option for the Building Code or are common practice.

However, for certain technologies such as Solar PV, CHP, and geothermal systems, it is recognized that these are larger, capital-intensive, longer term (20+ year) projects and are not the default option for construction. As such, these types of technologies are eligible to apply to the ESB program in new construction scenarios.

The measures that are eligible for exemption on new construction projects are:

- PV Systems (fully subscribed)
- CHP Systems
- Geothermal Systems

Additional exemptions for other technologies can be found in the Measures List.

For new construction projects, it is understood that some information may not yet be available, such as the rate class or Site ID. If this information cannot be provided, it can be noted in the application, and will be required during the post-project review. Additionally, if actual operating or performance data is not available for certain measures, modelling or simulations are acceptable substitutes. This data will be required at the post-project stage.



## 2. Application Process

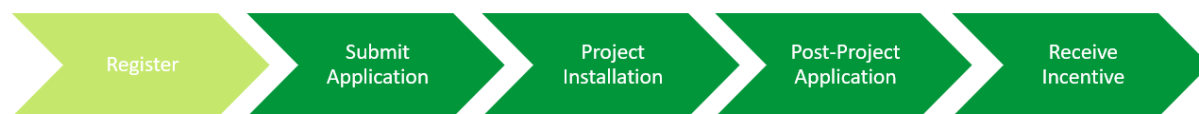
All applications for incentives in the Program will be processed on a first-come, first-served basis. The applications must provide sufficient information and be void of major deficiencies to be pre-approved and to reserve funding.

The application process is managed through an online portal, referred to as the Portal. Applying online for Project Incentives is designed to be efficient, user-friendly and secure. Pre-Approval Applications and Post-Project Applications, along with supporting documents, will only be accepted through the Portal.

**Application Tip:** A paper-based application process does not exist for the ESB program. If you are having trouble with using the Portal, please contact [support@esbprogram.ca](mailto:support@esbprogram.ca) and we would be happy to help.

There are 5 core steps to the application process explained in detail below.

### Step 1: Register



Prior to registering, we recommend that applicants and product and service providers familiarize themselves with all Program information and resources, including this Guidebook, Participant Terms and Conditions, Contractor Code of Conduct, and the Application Guide, which are located on the Program’s webpage. Once familiar with the resources, applicants and product and service providers can register to create an account within the Program.

Registration only requires basic information, for example: name, address, contact information, and some additional information for Eligible Facilities. Participants and Eligible Contractors will also need to consent to Licensing, the Program’ Privacy Policy and the Canadian Anti-Spam Legislation (CASL).

Once registration has been submitted, applicants will receive an email to confirm they have been successfully registered. Emails confirming successful registration will be sent out to Eligible Contractors once the registration information has been reviewed and approved.

**Application Tip:** As part of the registration process, an email is sent to verify your identity and confirm your email address. Please check your junk or spam folders if you don’t see the email in your main inbox.

## Step 2: Submit Application



This step begins by starting an Application in the Portal. Participants, or the registered business or non-profit, must create a new project under their account and fill in the required project information. Once initiated, Participants have the option to assign an Eligible Contractor who can complete the measure selection and documentation upload on the Participants behalf. If your contractor has not yet registered for the Program, you will not be able to assign them to your Eligible Project. Your contractor must first sign up as an Eligible Contractor for the Program. Once they have signed up, you will be able to select them from the drop-down list.

To **complete the application**, all required Eligible Project information must be provided, including but not limited to:

- The types and quantities of all Eligible Measures,
- Supporting documentation as required (e.g., specification sheets, quotes for Eligible Expenses and warranty confirmation), and
- Estimated Eligible Project completion timelines.

Once the application is complete, the Participant is responsible for reviewing the application, confirming the accuracy of all information, and **submitting the application for pre-approval**.

Once the application is submitted, an automated notification will indicate that the Application has been submitted successfully. At this time, the Application is locked to changes and will undergo a technical review by Program staff. If there are any questions or issues, a technical reviewer will be in contact and Applications can be unlocked for editing if changes are required. Participants will be notified and be expected to make changes in a timely manner.

When the review is complete, Participants will be notified via email of the review outcome. If the project is approved, **successful Applications** will be issued three documents, which make up the Participant Acceptance:

1. Application Summary (document that summarizes the Application),
2. Pre-Approval Notice (document that outlines the pre-approval), and
3. Participant Terms and Conditions (the Participant needs to agree to this document).

### Initiate Application

- Provide basic project information
- Assign an eligible contractor

### Complete Application

- Provide project details and documentation

### Submit Pre-Approval

- Review, confirm accuracy and submit Pre-Approval Application

### ERA provides Pre-Approval Notice

### Accept Terms

- Review & accept Program Terms & Conditions, Application Summary, and Pre-Approval Notice

**Application Tip:** Only Applicants receive the Participant Acceptance email. If a Contractor wants to know where an application is, they can log in and check the status on their Pre-Approval Applications tab. If the status is Application Draft Approved, it means the Applicant has received the Participant Acceptance email. If the status is Application Submitted, it means the Applicant has completed the Participant Acceptance, the incentive has been reserved and the project can move forward.

**The Participant must complete the project acceptance for funding to be reserved.** Once the Participant accepts the Participant Acceptance, the Applicant can begin installation.

#### Types of Notices:

1. **Pre-approval Application Notice:** A Pre-approval Application Notice is required to confirm Program eligibility and is a Program requirement. A Participant may start incurring Eligible Expenses once an Application has been submitted. Eligible Expenses are subject to review and approval.

A Pre-approval Application Notice does not entitle the Participant to Project Incentives. Approval of Project Incentives can only occur after ERA has reviewed and approved Project Completion Documentation.

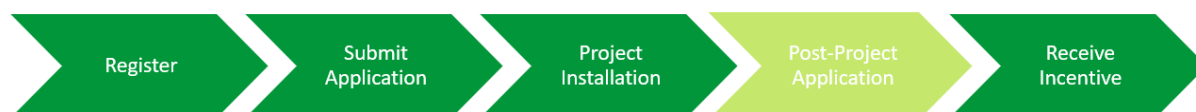
2. **Pre-approval Application Rejection Notice:** Any Applications that are incomplete or do not comply with Program requirements at the time of Application processing will be contacted via an Information Request notification. If the Participant cannot resolve the issues in 30 days, a Pre-approval Application Rejection will be issued to the Participant. Participants will be required to re-submit their Application with complete and accurate information and re-enter the queue upon submission.

#### Step 3: Project Installation



Once an Eligible Project has received a Pre-approval Application Notice and Participant Acceptance is completed, Participants and Eligible Contractors can proceed with purchasing and installing Eligible Measures. Participants are responsible for ensuring that all installations are completed with sufficient time to meet the Project Completion Documentation Submission Deadline.

#### Step 4: Post-Project Application



Once all installations are complete and operational, the **Participant initiates the submission** of the Project Completion Documentation and the Post-Project Application on the Portal. During this stage, the participant will be required to provide an Invoice for Project Costs, Proof of Payment for Project Costs, and any other documents to support conditions stated in the Notice of Approval. There may also be other requirements depending on the specific project.

At this time, the Participant can again **assign an Eligible Contractor** to support the detailed submission, similar to the process already described (e.g., to update the Eligible Measure quantity and cost and upload any documentation).

**To complete the Post-Project Application**, all required information outlined in the online application must be submitted to demonstrate that the Eligible Project was installed and completed in accordance with the **Participant Acceptance**.

The information required for the submission for the Project Completion Documentation may include but is not limited to:

- A spreadsheet showing all Eligible Expenses for each Eligible Measure, broken down by categories (see examples provided at section 4.1 of this Guidebook),
- A specification sheet for each Eligible Measure (if required by the Eligible Measures List),
- A copy of all receipts and invoices for all installed Eligible Measures and installation costs, clearly showing dates Eligible expenses were incurred,
- Proof of payment of all invoices, which matching the amount on the invoice,
- Proof of address of the Eligible Facility e.g., utility in the name of the business or business registration document showing the address,
- A list of all other funding received by the Participant for the Eligible Project,
- Any documentation required by the Eligible Measures List and the Participant Acceptance, and/or
- Photographs of the replaced and new equipment.

**Initiate Post-Project Submission**

- Notifies ERA project is complete and begins review process

**Post-Project Application**

- Complete post-project application and submit all required documentation

**Submit Post-Project Application**

- Review, confirm accuracy and submit post-project application

**ERA provides Final Approval Notice**

**Application Tip:** For approval, the submitted receipts and invoice(s) must indicate the date of payment, Eligible Facility address, Site ID, model numbers of the Eligible Measure(s), DLC® and ENERGY STAR® identification numbers (where applicable), the number of Eligible Measures purchased, price per Eligible Measure, and total cost. Please also list labour and design costs separately, for quicker application processing.

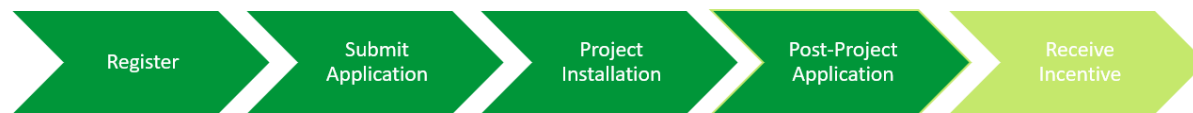
Once the Post-Project forms are completed in the Program Portal and the required documents are uploaded, the **Participant** is responsible for reviewing the Post-Project Application and confirming the accuracy of all information. The **Participant** can then **submit the Post-Project Application and Project Completion Documentation** for review. An automated notification will be sent to the Participant to indicate that the Post-Project Application has been submitted successfully.

At this time, the Post-Project Application will be locked to editing and will undergo a technical review. If there are questions or issues, a technical reviewer will request clarification and the Post-Project Application can be unlocked for editing if changes are required. Participants will be notified and are expected to make changes within 30 days.

A randomized sample of projects will be selected for a **virtual or in-person site visit** as part of the review and verification process. Site visit processes are described in Section 6 of this Guidebook: Evaluation, Measurement and Verification.

When the review is complete, **successful submissions will be issued a Payment Recommendation** indicating that the Eligible Project is approved, and Project Incentives will be disbursed.

## Step 5: Receive Project Incentive



Approved projects will be directed through the Portal to provide the necessary banking information to enable incentive payment. Payments will be made through a secure Electronic Fund Transfer (EFT) that ensures the protection of all banking information. Where an EFT is not possible, a cheque will be mailed to the Participant. The payment process is as follows:

1. Participant will receive a Payment Recommendation notice
2. Participant will receive an automated notification to setup an account for payment transfer
3. Participant will securely enter banking information
4. Incentive funds will be issued to the Participant's banking account within 4 weeks and Participant will be notified when this occurs

Participants also have the option of **assigning all or a portion of the Project Incentive directly to an Eligible Contractor** or Product and Service Provider should they wish to do so. This requires the completion of the Project Incentive Payment to Eligible Contractor Authorization Form. In this case, the designated Project Incentive recipient will be directed to follow the payment procedures indicated above. This form will be available to the Participant during the Post-Project Application stage within the Portal.

### Post-Projects Surveys

Once the Project Incentive is issued, Participants and Eligible Contractors will be requested to complete a post-project survey. The survey is voluntary and your feedback helps to improve the Program and future energy efficiency programming in the Province.

#### 2.1 Cancellation of Application

Incomplete or inactive applications may be cancelled after 60 days from when the application is first created in the Portal<sup>1</sup>. An applicant can also request the cancellation of an application.

#### 2.2 Application Deadlines

For projects that have received a Pre-Approval Notice, the Project Completion Documentation will be accepted **up to six months** after the date of the Pre-Approval Notice from ERA. This includes the final invoice and proof of payment.

ERA will send notification emails prior to the Project Completion Documentation Submission Deadline to remind Applicants of the approaching deadline, and to confirm the Participants intention to proceed with their Project. **After six months, the Pre-Approval Notice will expire and funding reservations will be cancelled.**

**Optional timeline extension:** in recognition of the additional complexity for large CHP Systems, PV Systems and Geothermal Systems, Participants may submit a Change Request for an extension to the Project Completion Documentation Submission Deadline.

<sup>1</sup> Incomplete applications may also be cancelled without notice at ERA's discretion.

No extensions will be granted beyond March 31, 2023. A Change Request must be included to ERA no later than 60 days before the original Project Completion Documentation Submission Deadline. Extension requests will need to submit additional documentation (e.g. construction timeline, rationale for extension) and will be reviewed by ERA on a case-by-case basis. The details about the timeline extension request and the broader Change Request process can be found in Section 5. A change to the project completion deadline would be considered a major change, which is covered in more detail in Section 5.2.



### 3. Project Incentives

Project Incentives are dependent upon availability of funds and are available on a first-come, first-served basis once a Participant receives a Pre-Approval Notice. ERA will continue to accept applications while Project Incentive funds are available. A tracker showing the amount of remaining Project Incentive funds is available on the Program website.

#### 3.1 Project Incentive Amounts for Individual Eligible Measures

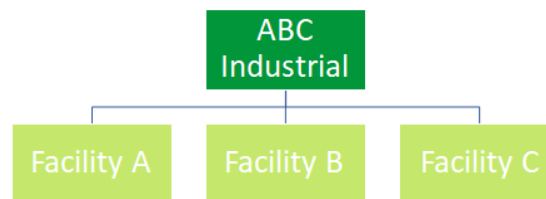
Project Incentive amounts for each individual Eligible Measure are specified in the Eligible Measures List, at the time of the Pre-approval Notice. The Project Incentive amount will be listed in the Pre-Approval notice.

#### 3.2 Calculation of Project Incentive Amounts

The Project Incentive will be calculated as the least of:

- (a) Sum of each of the incentive value from the Eligible Measures List multiplied by the number of units of the Eligible Measure,
- (b) Sum of the Eligible Expenses for each Eligible Measure multiplied by the number of Eligible Measure multiplied by the corresponding maximum percentage listed on the Eligible Measures List, (c) Pre-Project Estimated Incentive (as may be amended by an Application Change Approval Notice),
- (d) \$250,000 per Eligible Project, and
- (e) \$1 million less the total of all Project Incentives payable and paid to all direct and indirect “affiliates” (as defined in the Alberta Business Corporations Act) of the Participant as at the time of calculating the Project Incentive.

Below we have provided example Project Incentive calculations to help demonstrate different scenarios. The first four examples are for Julie Smith, owner of ABC Industrial, which has three facilities, A, B and C.



The fifth example is for John Jacob, owner of XYZ Commercial.

### Example 1: Per Unit Incentive

Julie is planning to install forty 20 HP Variable Frequency Drive (VFD)-Integrated Compressors at facility A. The Eligible Measures List indicates an incentive of \$3,000 per 20 hp VFD-integrated compressor.

Forty 20 HP VFD-integrated compressors \* \$3,000 per unit incentive = \$120,000 in incentives. Note her Eligible Expenses of \$250,000.

Project 1: Facility A	Incentive Value	Maximum % of Eligible Expense
Measure: VFD-Integrated Compressor - 20 hp	\$3,000	50%
Units installed	40	
Sum of Eligible Expenses		\$250,000
Total Eligible Measure incentive	\$120,000	
Total maximum incentive based on Eligible Expenses		\$125,000
<b>Total Eligible Incentive</b>	<b>\$120,000</b> (not \$125,000)	
<b>Julie's Total Project Cost</b>	<b>\$250,000 - \$120,000 = \$130,000</b>	

**Application Tip:** In this example, the Project Incentive is capped at 50% of the sum of Eligible Expenses. Examples of Eligible Expenses include the sum of the equipment and material, labour, design, as further defined in the Participant Terms and Conditions. Eligible Expenses must be substantiated with invoices and receipts.

Assuming the sum of all the Eligible Expenses totals \$250,000, Julie is eligible for \$120,000 in Project Incentives. This is because the total Eligible Measure incentive (\$120,000) is less than the total maximum incentive based on Eligible Expenses (\$125,000).

### Example 2: Maximum % of Eligible Expense

Using the same Eligible Measures from Example 1, assume now that Julie receives a second quote with labour discount on the original quote to install the forty 20 hp VFD-Integrated Compressors. As a result, Julie has

**\$230,000 as the sum of Eligible Expenses.** The value of the total maximum of Eligible Expenses with the labour discount is now \$115,000.

Project 1: Facility A	Incentive Value	Maximum % of Eligible Expense
Measure: VFD-Integrated Compressor - 20 hp	\$3,000	50%
Units installed	40	
Sum of Eligible Expenses		\$230,000
Total Eligible Measure incentive	\$120,000	
Total maximum incentive based on Eligible Expenses		\$115,000
<b>Total Eligible Incentive</b>	<b>\$115,000</b> (not \$120,000)	
<b>Julie's Total Project Cost</b>	<b>\$230,000 - \$115,000 = \$115,000</b>	

Julie is now eligible for a lower incentive amount (\$115,000) but she is still happy as the total project cost in Example 2 (\$115,000) is lower than the total project cost in Example 1 (\$130,000).

**Application Tip:** It is recommended that Applicants get multiple quotes from different contractors to check pricing, equipment specifications and project conditions.

### Example 3: \$250,000 Eligible Project Incentive Cap

Julie is now planning to undertake a **second project** and complete a full lighting retrofit at facility A beside the VFD-integrated compressors already installed. There are several different incentives for the different lighting systems and controls technologies listed on the Eligible Measures List. The total project cost is \$2,200,000. From adding up all the different measure incentives for the lighting project, the incentive on an Eligible Measure basis is \$1 million, however, there is also a \$250,000 incentive maximum per Eligible Project.

Project 2: Facility A	Incentive Value	Maximum % of Eligible Expense
Measure: Lighting Retrofit (multiple measures)	\$500,000	25%
Sum of Eligible Expenses		\$2,200,000
Total Eligible Measure incentive	\$500,000	
Total maximum incentive based on Eligible Expenses		\$550,000
Incentive maximum per Eligible Project	\$250,000	
<b>Total Eligible Measure Incentive</b>	<b>\$250,000</b> (not \$500,000 or \$550,000)	
<b>Julie's Total Project Cost</b>	<b>\$2,200,000 - \$250,000 = \$1,950,000</b>	

**Application Tip:** One project with multiple measures can be broken out over multiple applications.



#### Example 4: \$1 Million Parent Company Incentive Cap

After the success of projects at facility A, Julie now wants to undertake Eligible Projects at facility B and C.

At facility B Julie wants to install ten 20 hp VFD-Integrated Compressors for a total cost of \$90,000. The Eligible Project incentive is \$30,000 for facility B as shown below. Julie would need to register Facility B as a second facility and assign an Eligible contractor.

Project 3: Facility B	Incentive Value	Maximum % of Eligible Expense
Measure: VFD-Integrated Compressor - 20 hp	\$3,000	50%
Units installed	10	
Sum of Eligible Expenses		\$90,000
Total Eligible Measure incentive	\$30,000	
Total maximum incentive based on Eligible Expenses		\$45,000
<b>Total Eligible Incentive</b>	<b>\$30,000</b> (not \$45,000)	
<b>Julie's Total Project Cost</b>	<b>\$90,000 - \$30,000 = \$60,000</b>	

Finally, Julie wants to complete a full lighting retrofit at facility C at a cost of \$800,000. The incentive as per the measure list is \$150,000. However, as ABC Industrial has already received \$395,000 for Example 2, 3 and 4, and other projects.

ABC Industrial Projects	Incentive Value
Project 1: Facility A	\$200,000
Project 2: Facility A	\$250,000
Project 3: Facility B	\$30,000
Projects 4 and 5 (sum of 2 other projects)	\$390,000
<b>Total to Date</b>	<b>\$870,000</b>

Julie is only eligible for \$130,000 because of the \$1 million cap per Participant for multiple facilities. Therefore, for Project 4 at Facility C, Julie can apply, but the incentive will be limited to \$130,000.

Project 4: Facility C	Incentive Value	Maximum % of Eligible Expense
Measure: Lighting Retrofit (multiple measures)	\$150,000	25%
Sum of Eligible Expenses		\$800,000
Total Eligible Measure incentive	\$150,000	
Maximum Eligible Measure incentive		\$200,000
Incentive cap per parent company		\$1,000,000
Sum of incentives already provided to ABC Industrial		\$870,000
Remaining incentives before parent company cap		\$130,000
<b>Total Eligible Measure Incentive</b>		<b>\$130,000</b> (not \$150,000 or \$200,000)
<b>Julie's Total Project Cost</b>		<b>\$800,000 - \$130,000 = \$670,000</b>

**Application Tip:** The maximum % of Eligible Expense varies by Eligible Measure category. See table below:

Eligible Measure Category	Maximum % of Eligible Expense
Lighting Systems	25%
Lighting Controls	50%
Motors and Drives	50%
Compressed Air	50%
Refrigeration	50%
Geothermal	50%
CHP	50%
Solar PV	25%

#### Example 5: Changes to Eligible Measure Amounts

There is a limit to how much an incentive can be increased between the pre-project and post-project stage. For this example, let's assume John had already received a Pre-Approval Notice to install forty 20 hp VFD-Integrated Compressors in his commercial facility for an incentive of \$120,000.

However, upon further research John realizes he needs to add 10 more 20 hp VFD-Integrated Compressors to the project in order to meet anticipated increased demand. John receives a quote to complete the installation of fifty 20 hp VFD-Integrated Compressors and the incentive that he wants is \$150,000, which is a 25% increase.

John has three options to make the change:

**Option 1** – Submit a Change Request to include 10 additional 20 hp VFD-Integrated Compressors. This would be a Major Change Request since it is a request for an incentive increase of more than 10%.

*Application Tip: Change Requests must be submitted to ERA 60 days prior to the Project Completion Documentation Submission Deadline.*

*If John does not submit a Change Request and does not receive an Application Change Approval Notice, he will still need to send written notice to ERA and will only be eligible for 110% of the amount in the Application Summary (\$132,000)*

- *Initial application was forty 20 hp VFD-Integrated Compressors \* \$3,000 = \$120,000.*
- *\$120,000 \* 110% = \$132,000*

If ERA approves the Change Request, John will receive an Application Change Approval Notice and be eligible for \$150,000 in incentives.

Project 1: XYZ Commercial	Incentive Value	Maximum % of Eligible Expense
Measure: VFD-Integrated Compressor - 20 hp	\$3,000	50%
Units installed	50	
Sum of Eligible Expenses		\$312,500
Total Eligible Measure incentive	\$150,000	
Total maximum incentive based on Eligible Expenses		\$156,250
<b>Total incentive without the Application Change Approval Notice</b>		<b>\$132,000</b> (not \$150,00)
<b>Total Project Incentive With An Application Change Approval Notice</b>		<b>\$150,000</b> (not \$156,250)

Approval of Change Requests are made at ERA’s sole discretion and will be dependent on the rationale for the request, as well as the availability of Eligible Incentives. Additional details can be found in Section 5: Change Management.

**Option 2** – Submit a new application for 10 additional 20 hp VFD-Integrated Compressors

John can submit a new application for the 10 additional 20 hp VFD-Integrated Compressor. He will need to be able to allocate the expenses between the two projects.

**Application Tip:** *Option 1 is recommended over Option 2 if incentive funding is limited as John’s application will be reviewed on a first-come, first-served basis and his first application has already been approved. If incentive funding is not limited, either option is acceptable.. Please note that all eligibility requirements must be met for an application, including the minimum incentive of \$500.*

**Option 3** – Continue with existing Application for forty 20 hp VFD-Integrated Compressors.

If John does not want to submit a Change Request or submit a new application, he can decide to proceed with the original application for 40, 20 hp VFD-Integrated Compressors but will not be eligible for more than the \$132,000 in Project Incentives.

**Application Tip:** *To help decide on the best option for your Eligible Project, you may wish to review the amount of Eligible Incentives remaining in the Program, as posted on the Program website. If there are Eligible Incentives available and you have time to wait for an Application Change Approval Notice/Pre-Approval Notice, Option 1 or 2 may make the most sense for you.*

### 3.3 Change in Eligible Incentive Amounts

ERA reserves the right to amend incentive calculations within the Eligible Measure List during the life of the Program. Any changes will be communicated to Participants and Eligible Contractors.

The eligibility requirements and incentive levels in the Participant Terms and Conditions and Eligible Measures List, at the time of the Participant Acceptance Date, will remain in effect for the duration of the Project.

For more details on the Application Change Approval Notice and Change Request, please see Section 5 of this Guidebook: Change Management.

### 3.4 Stacking of Incentives

To participate in the Program, a facility cannot, nor can it be part of a group of facilities, that are subject to or have opted into the TIER Regulation at any time during the term of this Participant Acceptance.

The Eligible Project may not have received and is not receiving any financial incentives, funding, subsidies, grants or other monies as a result (directly or indirectly) of the TIER Regulation, the repealed Climate Leadership Act, or the Pan-Canadian Framework programs.

Participants may receive financial incentives, funding, subsidies, or grants or other monies other than as a result (directly or indirectly) of the TIER Regulation, the repealed Climate Leadership Act, or the Pan-Canadian Framework programs, provided the amounts and sources are set out in the Application process at Step 2: Project Details.

Stacking of incentives is allowed with programs such as Building Energy Retrofit Accelerator (BERA) program in Edmonton. Participants must meet the eligibility requirements in both programs and must inform ERA of the intent to stack incentives as part of Step 2: Application Submission.

**Application Tip:** *If a Project is receiving incentives, funding, subsidies or grants from the TIER Regulation, the repealed Climate Leadership Act or the Pan-Canadian Framework programs, it will not be eligible for incentive funding from the ESB program. If a Project is planning to receive or receive funding from the BERA program, it will need to stack incentives with the ESB program. The ESB program incentive will be paid first, and the BERA incentive will be a top-up. If a Project is receiving funding from other sources, it will not impact the ESB program incentive.*



### 3.5 Repayment of Project Incentives

There are some scenarios where project incentives may either not be paid or may need to be re-imbursed if already paid. These scenarios are outlined below:

1. The Participant is not in compliance with any terms or conditions of the Participant Acceptance and has not remedied the non-compliance issues within 30 days of being notified.

**Example:** During the post-project review, if it is found that the expenses were incorrect, and they are not updated, this would prevent the ERA from making the payment

2. If the Participant has made any statements in the Participant Acceptance or in any other communication to the ERA that is or becomes untrue, inaccurate or incomplete.

**Example:** During the post-project review, it is found that the measures are actually installed in a different facility, this would prevent the ERA from making the payment

3. If the Eligible Measure is modified, removed, or ceases to be operational.

**Example:** If the ESB program provides an incentive for a lighting project upgrade, and then six months later, it is discovered that the building has been renovated and all the lighting removed, this could trigger an incentive re-payment.



## 4. Eligible Expenses

Eligible Expenses play a large role in the program since they can impact the incentive calculation via the cap. For different projects, the cap ranges from 25-50%. The caps are explained in Section 3.2 – Examples 2 and 4 of this Guidebook. Expense eligibility can be impacted by both the type of expense and the timing.

The eligibility criteria for Eligible Expenses is outlined below:

Eligible Expenses	Ineligible Expenses
<ol style="list-style-type: none"> <li>1. Expenses incurred for the purchase or installation of Eligible Measure.</li> <li>2. Expense should not have been previously submitted and received an incentive earlier.</li> <li>3. Eligible Measure is fully installed and in commercial operation and the expenses have incurred prior to project completion date.</li> <li>4. <b>Eligible Contractor is a third party</b> to the Participant: the expense is one of the following:               <ol style="list-style-type: none"> <li>a. energy modelling costs (including studies and audits),</li> <li>b. engineering (structural, electrical, civil, geotechnical) costs,</li> <li>c. permit costs ,</li> <li>d. inspection costs,</li> <li>e. procurement and construction costs,</li> <li>f. equipment purchase costs,</li> <li>g. installation equipment costs (e.g., cables conduits, racking or anchors),</li> <li>h. installation labour costs, or</li> <li>i. costs of interconnecting with the electrical and/or natural gas distribution system.</li> </ol> </li> <li>5. <b>Eligible Contractor is not a third party</b> to the Participant: the expense is less than or equal to the fair market value of the Eligible Measure equipment only. Labour and installation costs cannot be included.</li> <li>6. Expenses were incurred either: after the Application Date; or (ii) after November 2, 2020, provided such expenses are listed in the Application Summary. Any Eligible Expenses incurred between November 2, 2020 and February 1 or February 24, 2021 must be submitted to ERA, via the Application Summary, by March 1 or 24, 2021.</li> </ol>	<ol style="list-style-type: none"> <li>1. Expenses that are not directly required to purchase or install the Eligible Measure.</li> <li>2. Costs where the applicable Eligible Measure is not installed and in commercial operation.</li> <li>3. Costs to repair or refurbish existing or used equipment.</li> <li>4. Costs to prepare or modify the Eligible Facility.</li> <li>5. Costs for aesthetic improvements.</li> <li>6. Costs to operate, maintain or upkeep equipment.</li> <li>7. GST or any other provincial sales taxes.</li> <li>8. Costs to purchase warranties or insurance.</li> <li>9. Costs of battery or storage equipment and installation.</li> <li>10. Overhead, administrative or internal costs.</li> <li>11. Costs to complete Program documents.</li> <li>12. Costs for energy modelling, unless incurred as part of the installation of an Eligible Measure.</li> <li>13. Any costs that have received financial incentives, funding, subsidies or grants from any other third party.</li> <li>14. Any costs incurred prior to November 2, 2020.</li> </ol>

ERA may require additional information to determine if a submitted cost is an Eligible Expense. Please refer to the Participant Terms and Conditions for the full list of Eligible Expenses.

**Application Tip:** *There are three specific scenarios for incurred expenses with regards to the date the expense was incurred.*

*Scenario 1: If an expense for an application is incurred before November 2, 2020, it is not eligible, and should not be included in the Total Project Cost in the application.*

*Scenario 2: If an expense for an application is incurred after November 2, 2020 and before the application submission, it needs to be disclosed and reviewed by ERA to determine eligibility.*

*Scenario 3: If an expense meets all the other requirements and is incurred after submission, it counts towards to the Total Project Cost.*

#### 4.1 Calculating Eligible Expenses

To submit an Application, a list of Eligible Expenses must be included. For Eligible Projects with multiple Eligible Measures, Eligible Expenses should be broken down for each Eligible Measure.

For example, Joe is planning a lighting project with three Eligible Measures:

- Bay fixtures
- Troffer fixtures
- LED exit signs

As Eligible Expenses must be broken down for each Eligible Measure, the labour, design and other costs should **not** be grouped. The allocation should be broken down for each Eligible Measure and uploaded as part of Step 5 of the Application Process: Documents . Please estimate the allocation for each Eligible as part of the application review.

The following tables provide examples of Eligible Expenses which have been grouped correctly:

Measure Itemization	Quantity	Cost/Unit	Total
Bay fixture equipment and material costs	80	\$100	\$8,000
Bay fixture labour costs	80	\$25	\$2,000
Bay fixture design and other costs	n/a	n/a	\$2,000
<b>Bay fixture total Eligible Expenses</b>			<b>\$12,000</b>

Measure Itemization	Quantity	Cost/Unit	Total
Troffer fixture equipment and material costs	48	\$125	\$6,000
Troffer fixture labour costs	48	\$50	\$2,400
Troffer fixture design and other costs	n/a	n/a	\$2,000
<b>Troffer fixture total Eligible Expenses</b>			<b>\$10,400</b>



Measure Itemization	Quantity	Cost/Unit	Total
LED exit sign equipment and material costs	40	\$75	\$3,000
LED exit sign labour costs	40	\$40	\$1,600
LED exit sign design and other costs	n/a	n/a	\$400
<b>LED Exit Sign Total Eligible Expenses</b>			<b>\$5,000</b>

The following table provides an example of Eligible Expenses which have been grouped **incorrectly**:

Bay fixture equipment and material costs	\$8,000
Troffer fixture equipment and material costs	\$6,000
LED exit signs equipment and material costs	\$3,000
Labour, design and other costs	\$10,400
<b>Total Eligible Expenses</b>	<b>\$27,400</b>

**Application Tip:** The expenses are grouped incorrectly in the example above since it is not clear how much of the labour costs, and how much of the design and other costs should be allocated to each measure from the total labour, design and other costs of \$10,400.

#### 4.2 Project Completion Documentation

As part of the documentation that must be submitted by the Participant or Eligible Contractor with the Post-Project Application, invoices and proof of payment are required to verify the Eligible Expenses.

Personal information should be redacted from the invoices and proof of payment before submission.

Invoices should clearly display the following information:

- Date
- Vendor Name
- Vendor Address
- Vendor Contact Information
- Customer Name
- Customer Address
- Equipment and Material Costs (must be itemized by Eligible Measure type)
- Labour, Design and Other Costs (if possible, itemize by Eligible Measure type)
- Total Costs

For proof of payment, a credit card statement, EFT, cheque or receipt can be used. The dollar amount in the proof of payment must match the Eligible Expenses.

## 5. Change Management

In most cases, the Applicant will be the one to request changes, but the Program Technical Review Team may also request changes. The different application stages and the corresponding change processes are summarized in the table below:

Status	Origination of Change	Change Mechanism	Limits to Change in Scope
Application Draft	N/A	Application is unlocked for changes.	Unlimited (subject to pre-approval).
Application Submitted	Applicant	Email sent by Applicant to unlock Application for changes. Status goes back to Application Draft.	Unlimited (subject to pre-approval).
Application Information Requested	Program Technical Review Team	Reviewer requests additional information and unlocks Application.  Status goes back to Application Draft.	Unlimited (subject to pre-approval) but should be limited to the information requested.
Post-Project Application Draft (submitted 60 days prior to the Project Completion Documentation Submission Deadline)	Applicant	Request for change via Portal.	Program Technical Review Team determines if Minor or Major Change. See section 5.1 and 5.2 of this Guidebook for details.  Depending on the type of change, the project may go back to the Pre-Project stage and enter the review queue again.
Post-Project Application Draft (submitted within 60 days of Project Completion Documentation Submission Deadline)	Applicant	Request for change via Portal.	Only Minor Changes approved.

Status	Origination of Change	Change Mechanism	Limits to Change in Scope
Post-Project Application Submitted	Applicant	Email sent by Applicant to unlock application for changes.  Request for change via email/Portal.  Status goes back to Post-Project Application Draft.	Only Minor Changes approved.
Post-Project Application Information Requested	Program Technical Review Team	Reviewer requests additional information and unlocks Application. Status goes back to Post-Project Application Draft.	Limited to the information requested.

From the Applicant’s perspective, once the Pre-Approval Notice has been received, the Project Incentive has been reserved and will be paid provided the Project meets all Eligibility requirements.

As such, changing the Project Incentive amount from the Pre-Approval Notice requires documentation. ERA will evaluate change requests on a case-by-case basis.

### 5.1 Minor Application Change Approval Notice

A Minor Application Change Approval Request is limited to four changes and can occur anytime before the Project Completion Date. A Participant may make any of the following amendments to the Application Summary by providing written notice to ERA via the Portal:

- An increase in the quantity of Eligible Measures listed in the Application Summary, where the Pre-Project Estimated Incentive increases by 10 percent or less,
- A decrease in the quantity of Eligible Measures to be installed,
- A change to the model number of an Eligible Measure provided that the new model number meets the same Specifications for that Eligible Measure, or
- A change to the Eligible Contractor.

ERA will confirm acceptance of the Change Request and issue a Minor Application Change Approval Notice to the Participant. The project deadline will not change and will continue to be what was indicated in the Pre-Approval Notice.

## 5.2 Major Application Change Approval Notice

A Major Application Change Request can only be requested **up to 60 days prior** to Project Completion Deadline and the change in scope is unlimited (subject to ERA approval).

The Participant may request any other change to the Participant Acceptance not listed under section 5.1. by submitting a Change Request form to ERA a minimum of 60 days prior to the Project Completion Documentation Submission Deadline. The Applicant can submit a Change Request form by completing the form in the Portal. For example, a project completion deadline extension would be a Change Request that would require a Major Application Change Approval Notice. **ERA will consider each Change Request on a case-by-case basis.**

Where ERA approves the Change Request form, ERA will issue a Major Application Change Approval Notice setting out the amended Pre-Project Estimated Incentive. For clarity, ERA will not pay Project Incentives for any Eligible Measure not listed in the Application Summary or Major Application Change Approval Notice.

Participants must receive their Major Application Change Approval Notice prior to installation of any additional Eligible Measures or Eligible Measure types. All Applications, including amended Applications, are reviewed in the order they are received. If approval is granted, the Project cost associated with the additional Eligible Measures will be added to the Application.

ERA cannot guarantee additional Project Incentives, greater than the amount approved in the Pre-approval Application Notice.

If ERA rejects the Change Request form, the Participant may terminate the Participant Acceptance and re-apply into the Program, if they so choose. If the Participant chooses to terminate the Participant Acceptance, they will be required to re-enter the queue.



## 6. Evaluation, Measurement and Verification

Program performance will be evaluated, measured and verified to ensure public dollars are being used effectively and efficiently. To achieve this, ERA will undertake various quality control procedures, which includes virtual or on-site visits for completed Eligible Projects.

If required, ERA will contact Participants or Eligible Contractors to check that Eligible Measures were installed and are performing as expected. There may also be the need for Participants and Eligible Contractors to participate in surveys, studies, or audits. This may be required for up to three years after the Program ends.

If contacted, the Participant or Eligible Contractor may be required to do the following:

- Answer questions and complete surveys,
- Provide reports or supporting documentation,
- Give on-site access to verify the Eligible Measure was installed and to take photographs,
- Track the energy performance for a small period of time using energy monitoring equipment and provide the results to ERA (at no cost to the Participant or Eligible Contractor), and/or
- Verify that the Eligible Expenses were calculated correctly.

ERA will make every effort to obtain supporting documentation digitally and comply with all provincial COVID-19 restrictions in place at the time of a quality control visit.

## 7. Reporting and Freedom of Information

The Program protects personal information of Participants and Eligible Contractors. Program information is collected in compliance with FOIP.

For more details on how the information you submit may be used, please refer to the applicable documents available on the ERA website or the Program Portal:

- [Participant Terms and Conditions](#)
- [Contractor Code of Conduct](#)
- [Emission Reductions Alberta's \(ERA\) Privacy Policy](#)
- [Enerva Energy Solutions' Privacy Policy](#)



## 8. Environmental Attributes

As per the Participant Terms and Conditions, ERA retains complete ownership of all the environmental attributes and environmental products associated with the project that received an incentive payment.

By taking part in the Program, the Participant must assign the environmental attributes and the environmental products to the ERA. This will be true if an application is provided an incentive.

## 9. Publicity & Branding

Collecting and promoting success stories associated with Eligible Projects in the Program is crucial for Program success. It can also be an effective way of promoting businesses participating in the energy efficiency and renewable energy space, to a captured audience.

ERA may publish Participant and Eligible Project details after requesting and receiving permission, and will make every effort to do so in collaboration with Participants and Eligible Contractors.

If the Participant does receive a Project Incentive, there may be a requirement to display a funding plaque that recognizes the contribution of the Low Carbon Economy Fund.

If you are interested in highlighting your Eligible Project or business, please contact us. ERA will be highlighting success stories throughout the life of the Program.

## 10. Frequently Asked Questions (FAQs)

A set of FAQs are provided on the Program website and will be updated from time to time.

## 11. Customer Satisfaction

Customer Satisfaction is a key component of Program success. Every effort will be made to improve the design and delivery of the Program, while creating consistent, predictable parameters for businesses and Eligible Contractors that participate. Feedback through surveys is a very important component of understanding how the Program is serving Participants and Eligible Contractors, and how the Program is perceived in the marketplace. Please consider taking a moment to fill out surveys when you receive them.

## 12. Contact Information

Website: [eralberta.ca/esb](http://eralberta.ca/esb)

Email: [support@esbprogram.ca](mailto:support@esbprogram.ca)

Phone: 1-844-407-0025

Local (403) number: 403-778-9467

Local (780) number: 780-306-8376

Local (587) number: 587-943-1688

