



Energy Efficiency Program – Energy Diagnosis and Implementation

Participant's Guide

Major Industries

Feasibility Studies and Implementation Grant





Imagine energy differently

As part of its Energy Efficiency Plan, Énergir offers several energy efficiency programs to its customers to help them reduce their consumption of natural gas.

This *Participant's Guide* is intended for customers who wish to participate in the Feasibility Studies and Implementation Incentives Grant.

The *Guide* includes the steps to follow to make a request for financial assistances, as well as the admissibility criteria. The *Guide* also includes the forms required to make a request for each financial assistance.

Énergir encourages participants to submit their requests electronically, along with the supporting documentation.

The conditions for participation are effective since **February 1, 2018** and updated on **October 1, 2020**.
However, Énergir reserves the right to modify or terminate the grant at any time without prior notice. Énergir also reserves the right to interpret the terms and conditions of the grant.

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For more information

For more information, please consult:

- Your Major Industries representative;
- energir.com
- or:

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By e-mail:

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514 598-3410



Definitions

Definitions

Below are definitions of the various terms used in this Guide.

Additional cost: The difference between the implementation costs (material acquisition, installation and engineering work) of the efficiency scenario and those of the reference scenario. In the case where the reference scenario corresponds to the existing situation and there are no implementation costs, additional cost corresponds to the implementation costs of the energy efficiency scenario.

Efficiency scenario: This scenario includes the energy efficiency measures that are the subject of the request for financial assistance.

Eligible expenses: Additional cost of the measures or project.

Energy efficiency measure (EEM): A measure implemented with a view to increasing the energy performance of equipment, a system or building, by reducing its natural gas consumption compared with the reference scenario.

Large-scale project: A large-scale project is a project of which annual natural gas savings are estimated at 500,000 m³ and over at the time of the application for eligibility.

Marginally free energy: Thermal energy released that would normally be lost or discharged without being used. Once the equipment to capture it is in place, this energy is considered free from a marginal point of view (versus energy sold by an energy distributor that is not free).

Mechanical compression refrigeration systems: A mechanical compression refrigeration system basically comprises a motor, a compressor, a cooler, a condenser, an expansion valve and an evaporator that transfers heat from one place to another. Heat pumps are essentially mechanical compression refrigeration systems. They act as exchangers of so-called active heat since they have a motor. The electrical energy consumed by the motor is usually in the form of heat, which is discharged to the condenser.

Monetary savings: Reductions in the cost of energy recorded during the monitoring period, compared with the reference scenario.

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Definitions

Payback period (ROI): Length of time required before the value of the annual natural gas savings associated with the measure are equal to the eligible expenses for the project.

$$\text{ROI} = \frac{\text{Eligible expenses of energy efficiency measure attributed to natural gas}}{\text{Annual natural gas savings (\$) associated with the measure}}$$

$$\text{ROI} = \frac{\text{Eligible expenses of energy efficiency measure attributed to natural gas}}{\text{Annual amount saved in m}^3 \times \text{unit costs of natural gas (Transportation + Load balancing + Inventory + Distribution + Supply + SPEDE (Cap \& Trade System))}^1 \text{ avoided cost}}$$

¹ Unit costs of natural gas are established based on the average of the 12 months preceding the request for financial assistance for the implementation. Customers who supply their own services may use their specific prices on condition that these are justified by supporting documentation and that they were in effect at the time the request was submitted. When these are not available, the costs published by Energir will serve as the reference.

For customers who are not considered major emitters under SPEDE, the SPEDE avoided cost corresponds to the charge for the SPEDE service. Customers considered major emitters may use an estimate of their own SPEDE avoided cost on condition that it is documented and justified.

Reference scenario: The reference scenario corresponds to the situation before implementation of the energy efficiency measures, if it is shown that the existing situation could be maintained (i.e. systems and equipment still functional after several years).

In the case where the existing situation cannot be maintained (i.e. end-of-life systems or equipment or before being replaced) or in the case of new construction or a new installation, the reference scenario corresponds to the system or equipment that could have been installed, according to standard market practice in energy efficiency.

Renewable thermal energy/known technologies: Air/aerothermal, ground/geothermal, solar/panels for heating water or air for walls or roofs.

Unused waste heat: Waste heat coming from an essential or unavoidable activity that is lost (stale air, processes, combustion products, motors/compressors/chillers, lighting, servers...)



Description and objective

Description and objective

The grants are aimed for identifying and implementing energy efficiency measures for rationalizing the consumption of natural gas that are not eligible for any other Énergir energy efficient equipment program.

The **Feasibility Studies Grant** component helps defray part of the cost of a feasibility study covering energy efficiency measures. The study will be carried out by an engineering consulting firm accredited by Énergir. The list of firms is available on [Énergir](#). The study may also be carried out by an engineer in the employ of the customer¹.

The **Implementation of Energy Efficiency Measures Grant** is aimed at rationalizing the consumption of natural gas through measures not eligible for one of Énergir high-efficiency equipment program.

These measures will have been studied and evaluated beforehand by an engineer member in good standing of the *Ordre des ingénieurs du Québec*, or under the direction and immediate supervisor of an engineer with full practice rights in Québec, before being submitted to Énergir for analysis and approval.

The measures studied and/or implemented must comply with the regulations and laws applicable in Québec, in particular those dealing with air quality and environmental protection, as well as with the provisions of the Natural Gas and Propane Installation Code (B149.1).

Payment of the financial assistance should not be interpreted as a guarantee to the customer with regard to the feasibility study, the energy simulation, or the implementation of the measures. That responsibility lies with the engineer responsible for the analysis.

Customers who would like to participate in one of these grants must complete the appropriate forms included in this Guide and send them to Énergir Energy Efficiency, along with the supporting documentation.

¹ An Énergir major industry advisor is covered by Tariffs D₄ or D₅. Affiliated accounts may also be included. Business customers covered by either Tariffs D₁ or D₃ are not eligible except for accounts affiliated with major industries.

Affiliated accounts are companies covered by Tariffs D₁ or D₃ whose energy supply is managed by a company covered by Tariffs D₄ or D₅, or whose location is the same as that of a company covered by Tariffs D₄ or D₅. Affiliated companies must be part of the same legal entity.

If you have any questions, please contact your Sales Representative. To find out about the grants Énergir offers its business customers, please consult: <https://www.energir.com/en/business/grants/energy-efficiency-programs/>

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Feasibility Studies Grant

This grant helps defray part of the cost of a feasibility study covering energy efficiency measures.

Study orientations

Accredited firms are invited to analyze and study the potential energy savings for all forms of energy consumed by Énergir customers admissible to the grant. However, the potential natural gas savings must be as great, if not greater, than the relative portion of the customer's total energy consumption that natural gas represents at the time of the study.

For large volumes, the study must focus first on measures using gas technologies. It may cover performance, optimization or modernization measures. The savings for other forms of energy may be studied as well, as long as the cost of the study, agreed to by the customer, includes that provision.

The financial assistance from Énergir may be adjusted to reflect the natural gas savings portion of the total energy savings identified in the study.

Feasibility Studies



Maximum period of time for completion (Feasibility Studies)



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Feasibility Studies

Financial assistance

The financial assistance Énergir offers its major industry advisor¹ is as follows:

Consumption volumes above 75,000 m³

The amount is the lesser of:

- 50% of the cost of the study before taxes, or
- \$50,000² per account number and per annual financial assistance.

Contribution from other organizations

Any participant covered by another financial assistance to carry out feasibility studies, such as those offered by Energy Transition Québec, Hydro-Québec, or any other organization, must declare any amount received or to be received for the same project to Énergir. Énergir will pay the customer the financial assistance granted under this grant, net of any contribution from other organizations for the same project, such that the portion payable by the customer represents at least 25% of the costs related to this study.

Since October 1, 2019, Feasibility studies that receive financial assistance from Transition Énergétique Québec (TEQ) are not eligible to Énergir's financial assistance³.

¹ An Énergir major industry advisor is covered by Tariffs D₄ or D₅. Affiliated accounts may also be included. Business customers covered by either Tariffs D₁ or D₃ are not eligible except for accounts affiliated with major industries.

Affiliated accounts are companies covered by Tariffs D₁ or D₃ whose energy supply is managed by a company covered by Tariffs D₄ or D₅, or whose location is the same as that of a company covered by Tariffs D₄ or D₅. Affiliated companies must be part of the same legal entity.

If in doubt, please communicate with your Sales Representative. For the Énergir grants offered to major industries clients, consult: <https://www.energir.com/en/major-industries/energy-efficiency-programs/energy-efficient-programs/>

² The amount of \$50,000 applies to requests received from October 1, 2019. Requests received before that date are eligible for a maximum amount of \$5,000 or \$20,000 in the case of a feasibility study followed by a specific study.

The date of receipt of the request corresponds to the date Énergir received Forms I and IIa.

³ Requests for Feasibility studies received (reception by Énergir of Forms I, IIb and III completed) prior to October 1, 2019 are eligible to receive Énergir's financial assistance in addition of TEQ financial assistance.

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Feasibility Studies

Admissibility criteria

1. Applicable to Énergir major industry advisors

Eligible activity sectors are the:

- institutional sector;
- industrial and commercial sector.

2. The study must be done by an accredited firm

All feasibility studies must be carried out by a Énergir [accredited firm](#). Some firms submitted an application in order to participate in the grant, and the ones that qualified obtained the status of accredited firm. For more details on the requirements for accreditation by Énergir, consult the document: [Accreditation for firms specializing in energy management](#).

If a company wishes to have the study done by an engineer in its employ, it must complete an accreditation form and respect the requirements in order to be able to carry out the study.

All feasibility studies must be carried out and/or verified by an engineer member of the *Ordre des ingénieurs du Québec*.

3. The request for financial assistance must be submitted before the study is carried out

All requests for financial assistance for feasibility studies must be submitted before the analysis work is begun, along with the following documents: **Request for eligibility (Form I)**, **Request for financial assistance (Form IIA)** and **Service proposal from accredited firm**. The maximum time allowed for carrying out a study is six months from the date of acceptance by Énergir.

4. The specifications and proposal must be respected

The feasibility study submitted to Énergir must respect the specification items described below, where applicable. The proposal must contain, but not be limited to, the scope of the mandate, the measures to be studied, the personnel who will participate in the study, with details of their fees (hourly rate, tasks, number of hours). Énergir does not necessarily want to impose a standard format standard on all firms or on all customer participants; however, the feasibility studies must meet the minimum conditions. A [Preparation Guide](#) for feasibility studies is provided for this purpose by Énergir. Also, any measure studied but not recommended must also be described on Form III in the same way as the measures recommended in the study.

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Feasibility Studies

5. Measures that call for substituting natural gas by another form of energy are prohibited

Given that this financial assistance is principally aimed at the efficient and rational use of natural gas, measures for substituting natural gas by another form of energy, whether for strictly economic or short-term reasons, or for any other reason, are not admissible and must not be included in the report. Should they be included, the application will be refused without any possibility of modification. Some substitution measures may be included in the report after agreement with Énergir and before the study is carried out.

6. The facilities or buildings covered by the feasibility study must not have been the subject of a similar study in the preceding five years

In the case where the facilities have been modified since the date of the last study, or the scope of the new study is so different as to make the conclusions of the earlier study obsolete or inapplicable, Énergir may, with supporting evidence, authorize the customer to participate in the grant.

7. Modernization should not be the main focus of the recommendations

Measures aimed at the modernization of natural gas equipment or the building envelope should not be the main focus of the study recommendations. The objective of the study is primarily to identify possibilities other than replacing an obsolete technology by a more efficient one covered by other Énergir energy efficiency programs.

8. Tariff optimization should not be the main focus of the recommendations

9. A preliminary version of the feasibility study is mandatory in order to obtain a grant

A preliminary report must be submitted to Énergir before the final version is submitted to the customer. A [Preparation Guide](#) has been produced that we strongly recommend you follow.

10. The measures studied must comply with laws and regulations

The measures studied and/or implemented must comply with the regulations and laws applicable in Québec, in particular those dealing with air quality and environmental protection, as well as with the provisions of the Natural Gas and Propane Installation Code (B149.1).

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Feasibility Studies

Items from specifications

1. Description of building (year built, floor area and usage)
2. Description of building's energy systems
3. Details of energy consumption and costs³
4. Verification of any contractual agreements covering tariff and contract obligations and analysis of impacts on customer
5. Inventory of energy improvements proposed

The measures recommended should be grouped into four categories:

- load reduction (performance measure);
- optimization (repair, maintenance, retrofitting, simple measures);
- modernization measures⁴ (replacement by more modern energy-efficient equipment);
- building envelope measures (if applicable).

Each measure proposed, whether recommended or not, should include the following details:

5.1 Description of each improvement and drawing (drawings optional)

When applicable, describe:

- a) the reference scenario
- b) the efficiency scenario

Please refer to the definitions page for more information.

5.2 Investment required:

- work (details of estimates should be provided to Énergir, as indicated in the [Preparation Guide](#));
- engineering and fees;
- grants and tax measures (if offered and applicable).

Énergir requires estimates of the additional costs related to the proposed energy efficiency measures. To do so, please refer to the form showing the costs of each measure: **Detailed Report of Costs (Form IIIa)**.

³ Indicate the total cost of natural gas used to make the calculations of profitability and the prices of other energy sources, as described on page 16 of this Guide.

⁴ Recommendations that concern specific Énergir energy efficiency programs should be identified in order to avoid double counting.

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Feasibility Studies

- 5.3 Energy savings⁵
- 5.4 Calculations of cost-effectiveness, including ROI (payback period), using the calculation method shown on page 16.
- 5.5 Useful life of improvement and net savings over its useful life
- 5.6 Environmental impact
 - reduction in greenhouse gas emissions: quantity per year.
- 5.7 Other non-energy benefits (if applicable)
6. Timetable for the implementation of the measures
7. Training and/or awareness raising plan for managers and personnel (if applicable)
8. Recommendations with respect to performance guarantees (if applicable)
9. Appendices (information on technologies, grants, etc.)

⁵ Provide detailed calculations of savings.

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Implementation of Energy Efficiency Measures Grant

This grant is aimed at the rationalization of natural gas consumption that is not covered by any other Énergir energy efficiency programs.

Financial assistance

The financial assistance granted under this grant is based on the activity sector, as well as on the payback period, calculated by measuring energy efficiency before any grant. This amount is then applied to the volume of natural gas saved for the first year following implementation of the energy efficiency measures. However, the payback period must not be less than one year (three years in the institutional sector) once the amount of the grant has been deducted from the cost of the measures. Énergir will send a letter indicating the financial assistance for the whole project. The customer will then have one year from the date of that letter to implement the measures.

Implementation of Energy Efficiency Measures

Maximum period of time for completion (Implementation of Energy Efficiency Measures)



		ROI ¹					
		Less than 1 year	1 to 2 years	2 to 3 years	3 to 5 years	5 to 7 years	7 years or +
Industrial/ Commercial	Not eligible	\$0.15/m ³	\$0.25/m ³	\$0.30/m ³	\$0.30/m ³	\$0.30/m ³	\$0.30/m ³
Institutional	Not eligible	Not eligible	Not eligible	\$0.15/m ³	\$0.25/m ³	\$0.30/m ³	\$0.30/m ³

The maximum amount of financial assistance may not be higher than the lesser of **\$175,000** or **50%** of the total implementation costs (including equipment and installation costs), and any grants from sources other than Énergir.

Requests for less than **\$1,000** are not admissible.

Measures for which the payback period is less than one year (3 years in the case of institutions) are not eligible. However, Énergir encourages reporting such measures so it can calculate all the savings from the project.

¹ For requests received on or after February 1, 2018. Requests received before February 1, 2018 are covered by the terms and conditions in effect at the time the request was received.

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The maximum amount of **\$175,000** is paid only once for the first year, but financial assistance may be accorded for other measures in subsequent years. The amount accorded is determined based on the date the request for financial assistance (Step 1) is received; however, the maximum annual amount is recognized based on the date of payment, which respects Énergir fiscal year. The amount accorded may be revised once the supporting documentation has been received.

Even though the request must cover new measures, Énergir will accept requests for measures already being implemented, provided that the work began after the January 1 preceding the start of Énergir current fiscal year and that the work had not been completed at the time the request was made.

Énergir fiscal year starts on October 1 and ends September 30. However, all applications must be submitted by September 15 at the latest, or they will be carried over to the following fiscal year.

Implementation of Energy Efficiency Measures

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Implementation of Energy Efficiency Measures

Admissibility criteria

- 1. This financial assistance is intended for current and about-to-become major industrial customers² of Énergir, as well as for new construction projects by Tariff D₄ and D₅ customers**

Eligible activity sectors are the

- institutional sector;
- industrial sector.

Note that for about-to-become customers the financial assistance will be paid once their Énergir account number has been issued.

- 2. The energy savings measure must relate to the consumption of natural gas**

Any energy savings measure that has a direct or indirect impact on the consumption of natural gas may be eligible, provided that its aim is not to substitute natural gas by another source or to eliminate it. Also, the measure must not be similar to a technology covered by other Énergir energy efficiency programs, regardless of its level of energy efficiency.

- 3. Recovery of thermal energy (heat) from sources other than natural gas**

Énergir accepts measures such as geothermal or air energy or heat recovery from sources other than natural gas under certain conditions:

- 3.1. The thermal energy recovered must be: i) marginally free, AND ii) come from unused waste heat or renewable thermal energy.³**
- 3.2. Unused waste heat must be generated on the premises from the implementation of energy efficiency measures.**

However, measures aimed at the recovery of waste heat from a water distribution system between the buildings (urban system) could be eligible under certain conditions. Where applicable, such measures must be submitted in advance to an Energy Efficiency Advisor for analysis.

- 3.3. The thermal energy recovered must lead to a reduction in natural gas consumption, regardless of usage (heating, hot water, ventilation, process).**

² An Énergir major industry customer is covered by either Tariffs D₄ or D₅. Affiliated accounts may also be included. Affiliated accounts are companies covered by Tariffs D₁ or D₃ whose energy supply is managed by a company covered by Tariffs D₄ or D₅, or whose location is the same as that of a company covered by Tariffs D₄ or D₅. Affiliated companies must be part of the same legal entity.

³ While thermal solar energy is considered a renewable thermal energy, it is excluded from this grant since Énergir already offers a specific grant for solar energy.

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Implementation of Energy Efficiency Measures

- 3.4. If a mechanical compression refrigeration system (e.g. heat pump) is utilized to recover unused waste heat, the portion of electrical energy consumed by the compressor motor must be deducted from the total of recovered energy in the calculation of energy savings.**

Énergir only recognizes net savings. Also, if the same mechanical compression refrigeration system is used for air-conditioning open space, the system must be included in the reference scenario and the costs associated with its purchase and installation may not be recognized as eligible expenses.

- 3.5. If the implementation of an energy efficiency measure avoids the installation of a natural gas appliance, the cost of installing that appliance must be estimated and included in the reference scenario when calculating eligible expenses and the payback period (ROI).**
- 3.6. The consumption of natural gas following implementation of the energy efficiency measures must ensure the cost-effectiveness of the connection and represent at least 30% of natural gas consumed before the project was undertaken.**
- 3.7. A preliminary version of the study describing the energy efficiency measures, as well as the calculations of the energy savings, must be submitted to Énergir for approval by the consulting engineer before being presented to the customer.**

Énergir reserves the right to interpret the terms and conditions of the grant and to revise and validate the hypotheses and parameters of the calculation of the energy recovery measures presented.

4. The measure must be recommended and justified

All measures must be recommended and justified either by a technical-economic feasibility study or by a report or other pertinent document signed by an engineer member in good standing of the *Ordre des ingénieurs du Québec*.

Such documents may include:

- any firm accredited by Énergir to carry out technical-economic feasibility studies for an assistance program;
- a report from an engineering consulting firm with its head office in Québec;
- a study carried out by an engineer employed by a manufacturer or distributor of energy efficient equipment;
- study by an engineer in the employ of the customer.

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Implementation of Energy Efficiency Measures

5. The natural gas savings must be supported by calculations

The detailed calculations must be done or verified by an engineer in good standing of the *Ordre des ingénieurs du Québec*.

The justification for the savings must be based on current and anticipated operating conditions. For new buildings, the hypotheses proposed for estimating the reference consumption of natural gas must be submitted and must reflect current industry practices. The calculations must be made in accordance with recognized engineering methods.

6. A measure covered in the request for financial assistance that is part of a series of measures must be appropriately documented

The costs and savings must be identified separately for each measure in the same project.

7. Measures covered by other Énergir energy efficiency programs must be distinct from the other energy savings measures

If a measure is combined with the replacement of an appliance covered by the Énergir Business Efficient Appliances program, then the savings related to that measure must be separated from those stemming from replacing the appliance. The same applies to measures encouraged by other Énergir energy efficiency programs.

8. Measures covering boilers can be accepted

Boilers with a capacity over 5 MMBtu/h may be accepted under the Implementation of Energy Efficiency Measures Grant.

9. Performance measures that do not require any expenditure on equipment or products are not eligible

10. Maintenance measures (replacement as a result of a breakage; repairs) are not admissible

11. The measures implemented must comply with laws and regulations

The measures studied and/or implemented must comply with the regulations and laws applicable in Québec, in particular those dealing with air quality and environmental protection, as well as with the provisions of the Natural Gas and Propane Installation Code (B149.1).

12. Any participant covered by another financial assistance to carry out the project must declare any amount received or to be received for the same project to Énergir

Énergir will pay the customer the financial assistance granted under this grant, net of any contribution from other organizations for the same project, such that the portion payable by the customer represents at least 25% of the costs related to the project.

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Implementation of Energy Efficiency Measures

Maximum period
of time for
completion



Implementation
of Energy Efficiency
Measures

13. Handling of file for customers using the competitive make-up gas service

Customers who use the competitive make-up gas service are eligible for the grant, but the volume allowable must be calculated pro rata based on consumption over the 12 months preceding the request. The financial assistance is paid at the end of the work, on receipt of supporting documentation. However, if the customer and equipment covered by the energy savings measure do not consume more natural gas at the time of the request for payment, the payment will be held back until the natural gas consumption volume is restored. The maximum time allowed before the financial assistance is paid is one year.

14. Calculation of ROI (payback period)

$$\text{ROI} = \frac{\text{Eligible expenses of energy efficiency measure attributed to natural gas}}{\text{Annual natural gas savings (\$) associated with the measure(s)}}$$

That is

$$\text{ROI} = \frac{\text{Eligible expenses of energy efficiency measure attributed to natural gas}}{\text{Annual volume saved in m}^3 \times \text{unit costs of natural gas (Transportation + Load balancing + Inventory + Distribution + Supply + SPEDE (Cap \& Trade System) avoided cost)*}}$$

* Unit costs of natural gas are calculated based on the average of the 12 months preceding the month of the request for financial assistance under this grant. Customers who provide their own services may use their specific prices on condition that these are documented in supporting documentation and that they are in effect at the time the request is made. When these are not available, the prices published by Énergir will serve as the reference.

For customers not considered high emitters under the Cap & Trade System, the SPEDE avoided cost corresponds to the Tariff rate "SPEDE service." Customers who are considered high emitters may use an estimate of their own SPEDE avoided cost as long as it is documented and justified.

15. Monitoring of savings is mandatory for all projects representing annual natural gas savings of 500,000 m³ and over (large-scale project)

For more details, please refer to the "Savings Monitoring" section in this Guide.

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Mandatory step in monitoring savings

This step is mandatory for participants in the Implementation of Energy Efficiency Measures Grant whose project represents annual natural gas savings of 500,000 m³ and over (large-scale project) and whose requests have been received after February 1, 2018.⁴

For customers with potential annual natural gas savings of 500,000 m³ and over, Énergir requires participants to submit a **Savings Monitoring Plan (Appendix 2)**, outlining the energy savings.

Énergir must receive a **Monitoring Report** at the start of the project that includes various data for monitoring the savings generated by the measures implemented.

After implementation of the energy efficiency measures, the customer has up to 12 months to submit the **Savings Monitoring Report (Appendix 3)**, showing the results obtained, as well as any differences noted compared with the savings initially calculated.

Additional financial assistance will be paid to the participant under the savings monitoring grant.

Savings Monitoring

⁴ Requests received before February 1, 2018, can benefit from the terms and conditions in effect at the time of the request.

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Savings Monitoring

Financial assistance

The additional financial assistance offered by Énergir under this grant is meant to cover the professional fees charged, as well as the measuring equipment required, to monitor the energy savings. **The financial assistance paid applies only to large-scale projects.**

The amount of this additional financial assistance is limited to 80% of the expenses related to carrying out the monitoring and may not exceed \$15,000.

The eligibility of the expenses, and the amount of the additional financial assistance for monitoring the savings, must be approved by Énergir.

The additional financial assistance will be paid to the participant after the **Report on Savings Monitoring (Appendix 3)** has been approved by Énergir.

Contributions from other organizations

Any customer who is participating in another financial assistance program for carrying out the monitoring agreed to declare any amount received and/or to be received to Énergir. Énergir will pay the customer the financial assistance envisaged under the Savings Monitoring Grant, less the contribution(s) from other organizations for the same monitoring, so that the total contributions received do not exceed 100% of the expenses related to carrying out the monitoring.

Requirements

In addition to complying with the admissibility conditions, as well as with the terms of participating in the Implementation component, large-scale projects must meet the following requirements:

1. Mandatory savings monitoring is addressed at customers who are participating in the Énergir Implementation of Energy Efficiency Measures Grant and whose projects have potential savings of 500,000 m³ and over.
2. Customers must have made a prior request for financial assistance under the Implementation of Energy Efficiency Measures Grant, accompanied by a **Savings Monitoring Plan (Appendix 2)**.
3. The **Savings Monitoring Plan** must be submitted to Énergir for approval before its implementation.
4. The **Savings Monitoring Plan** must be carried out or verified by a member in good standing of the *Ordre des ingénieurs du Québec*.
5. The savings monitoring must respect the elements in the **Savings Monitoring Plan (Appendix 2)**. While Énergir does not wish to impose a standard format on all participants, it does want to ensure that the various elements included in the plan are covered.

Principal elements in the Savings Monitoring Plan

- a. Objective of Savings Monitoring Plan
- b. Description of key parameters
- c. Description of proposed methodology

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- d. Procedures for analysis and calculations
- e. Monitoring period
- f. Costs and fees

Once the measures have been implemented, are operational, and the monitoring period completed, the customer must submit the **Savings Monitoring Report (Appendix 3)** to Énergir for approval.

7. The **Savings Monitoring Report (Appendix 3)** must include all the references used for the calculations, the measurement data, as well as details of the calculation methods employed.
8. **The calculations** must have been done or verified by a member in good standing of the *Ordre des ingénieurs du Québec*.
9. The savings monitoring must be carried out during the period indicated in the **Savings Monitoring Plan**. It is important to carefully choose a representative period for the final use of the measure (heating, air conditioning, process). For example, for measures affecting heating or air conditioning, a complete heating cycle should be monitored. For measures related to processes, two weeks of monitoring the savings might be judged sufficient.

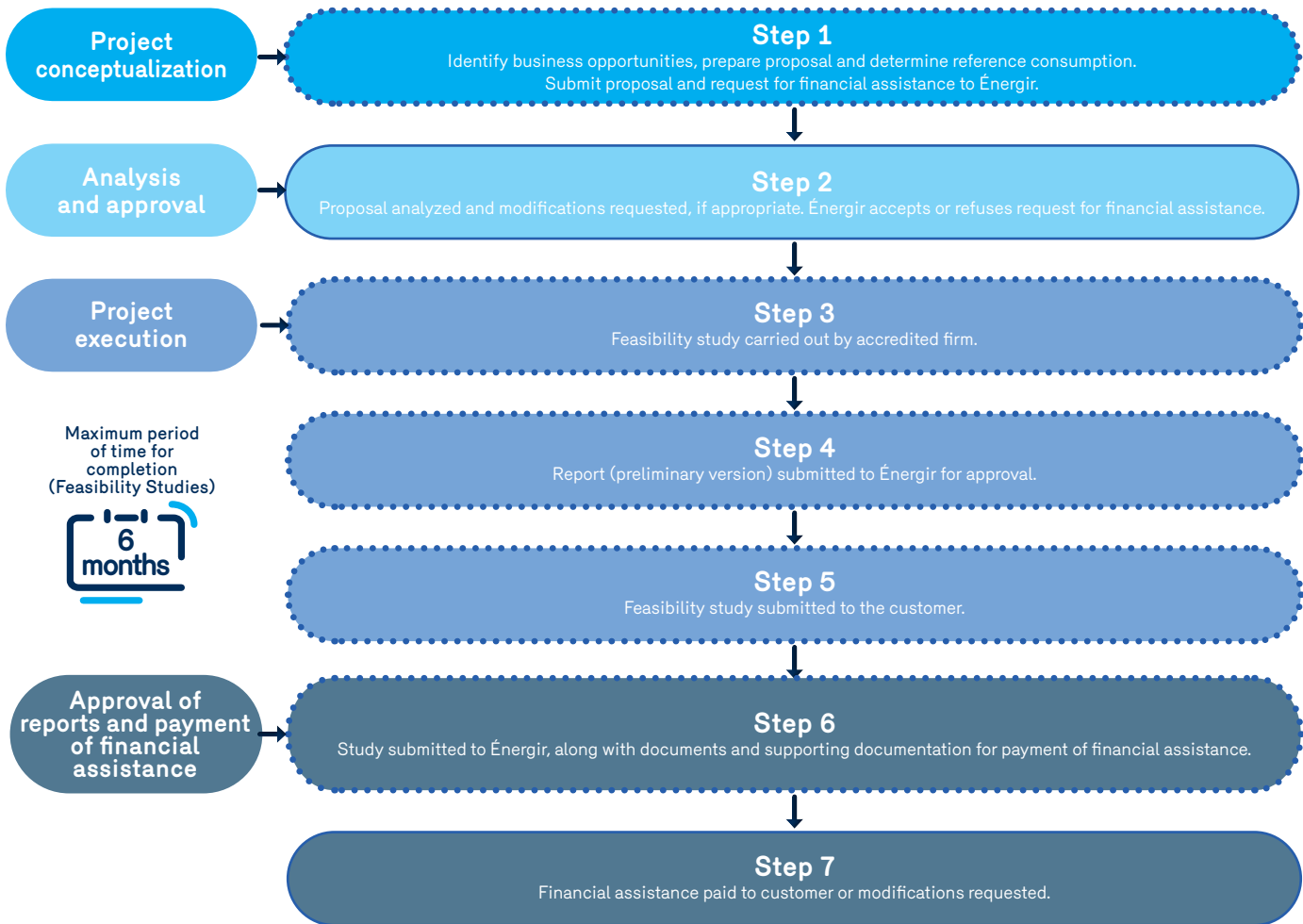
The results of the monitoring will have no impact on the financial assistance received under the Implementation of Energy Efficiency Measures Grant.

Énergir requests that participants use a method that takes into account the context and particularities specific to your project in order to evaluate the energy consumption levels after implementation of the project. That method may be based on the International Performance Measurement and Verification Protocol (IPMVP)⁵ **or any other appropriate approach.**

Savings Monitoring

Feasibility Studies

Steps to follow (table)



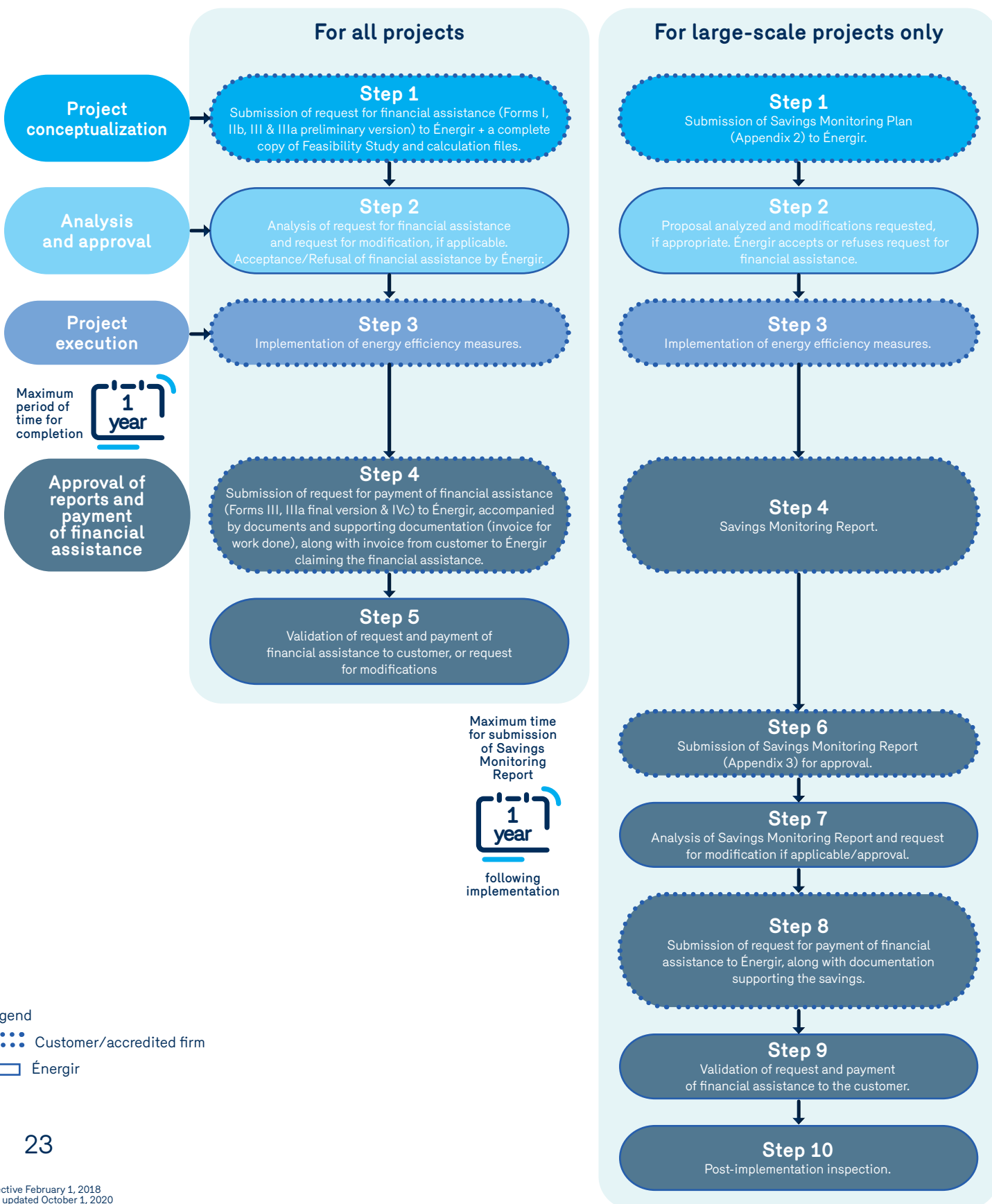
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Customer/accredited firm

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Implementation of Energy Efficiency Measures

Steps to follow (table)





Steps to follow

Steps to follow

Feasibility Studies

Step 1

Submission of request for financial assistance to Énergir

The financial assistance is intended for Énergir major industrial customers who would like to have feasibility studies done. As a first step, the customer submits a request for financial assistance to Énergir by completing the **Application for admissibility (Form I)**, the **Request for financial assistance (Form IIa)** and the **Detail of internal resources (Form V)**, if applicable.

The application must be accompanied by a complete proposal from the accredited firm, or the participating customer, that includes a brief description of the measures to be analyzed in the feasibility study and an indication of the amount of financial assistance the customer expects to receive.

In submitting the application, the customer declares that he has read the admissibility criteria.

Step 2

Analysis of proposal and request for modification (if applicable); acceptance

Énergir analyzes the request for financial assistance based on the admissibility criteria and confirms in writing its acceptance (or refusal) of the request for financial assistance, the amount accorded, the deadline for completion, as well as a reminder of the performance conditions and specifications to be respected.

The customer agrees that Énergir may request details from the accredited firm, or its own engineer, regarding the content of the proposal and make modifications, but without changing the cost of carrying out the study.

Step 3

Feasibility study carried out

The accredited firm, or the participating company, has six months from the date Énergir agrees to pay the financial assistance to carry out the feasibility study in accordance with the proposal and specifications.

Step 4

Submission of report (preliminary version) to Énergir for approval

The accredited firm submits a preliminary version of the study to Énergir. The customer agrees that Énergir may request the accredited firm to make modifications to the study so that it respects the specifications and the



Steps to follow

service proposal. The accredited firm submits the **Summary of measures covered by the request for financial assistance (Form III) and the Detailed report of costs (Form IIIa)**, ensuring the fields “Customer authorization” and “Validation by engineer” are duly completed.

Step 5

Submits feasibility study to customer (accredited firm)

The accredited firm submits the final version of the study to the customer.

Step 6

Submission of study to Énergir, along with documents and supporting documentation for payment of the financial assistance

The customer completes the Transmittal Form for submitting the documents and supporting documentation to go with the **Request for payment of financial assistance (Form IVa)**. The customer has one month following receipt of the study from the accredited firm, or following receipt of the technical review report in the case of an energy simulation, to make the request for payment of the financial assistance.

The Transmittal Form must be accompanied by the following documents:

- a complete copy of the final version of the feasibility report on which the completion date is indicated, as well as the identity of the professional who carried out the study or approved the report;
- a copy of the invoice sent to the customer by the accredited firm, representing the total cost of the feasibility study plus applicable taxes (GST and PST);
- an invoice from the customer to Énergir to claim the financial assistance, plus applicable taxes (GST and PST).

Step 7

Payment of financial assistance to customer or request for modifications

Énergir analyzes the report and if it is considered satisfactory, i.e., if it respects the eligibility criteria and specifications and if all the documents have been received, Énergir so advises the customer and issues a cheque. If the scope of the study was modified while underway, or if the study is considered unsatisfactory, then Énergir reserves the right to ask the accredited firm to make certain revisions or modifications and to put the payment of the financial assistance on hold until an acceptable version is received. Énergir so advises the customer.



Steps to follow

Implementation of Energy Efficiency Measures

Step 1

Submission of request for financial assistance to Énergir

The financial assistance is intended for Énergir major industrial customers and about-to-become customers who would like to implement the energy savings measures proposed in a technical-economic feasibility study or other document recognized by the grant. As a first step, the customer submits a request for financial assistance to Énergir by completing the **Application for admissibility (Form I)** and the **Request for financial assistance (Form IIb)**

In the request for admission, the customer must include a complete copy of the Feasibility Study which describes the measure(s) covered by the request, along with a preliminary version of the **Summary of measures covered by the request for financial assistance (Form III)** and the **Detailed report of costs (Form IIIa)**.

For projects representing annual natural gas savings of 500,000 m³ and more, the customer must also include the **Savings Monitoring Plan (Appendix 2)** with the request. Please refer to the Savings Monitoring Plan for more details.

In submitting the application, the customer declares that he has read the grant admissibility criteria.

Step 2

Analysis of request for financial assistance and project documents/acceptance

Énergir analyzes the request for financial assistance based on the admissibility criteria and confirms in writing its acceptance (or refusal) of the request for financial assistance, the amount accorded, the deadline for completion, as well as a reminder of the performance conditions.

The customer agrees that Énergir may request details from the firm responsible about the scope of the request for financial assistance and the project documents, or make modifications to them, without, however, changing the implementation costs.

For projects representing annual natural gas savings of 500,000 m³ and more, Énergir will analyze the **Savings Monitoring Plan (Appendix 2)** and confirm its acceptance or denial of the Savings Monitoring Plan in writing.

Step 3

Energy savings measures implemented

The customer has one year from the date Énergir agrees to pay the financial assistance to implement the measures approved by Énergir. The customer must advise Énergir if this deadline cannot be respected. Beyond that deadline, Énergir reserves the right to refuse payment of the financial assistance for implementation of the measures.

The measure, as approved by Énergir, must be implemented in its entirety. However, if the measure is implemented differently or modified, the participant must complete the appropriate form, as described below.



Steps to follow

Step 4

Submission of request for payment of the financial assistance to Énergir, along with documents and supporting documentation

The customer completes the **Request for payment of financial assistance & implementation certification (Form IVc)**. This request must be presented within a year following the date indicated on the letter agreeing to the original request.

The request must be accompanied by the following documents:

- a copy of invoice sent to the customer by the supplier of the goods provided or services rendered;
- final version of the **Summary of measures covered by the request for financial assistance (Form III) and the Detailed report of costs (Form IIIa)**, reflecting the actual costs for acquiring and installing the equipment and the services rendered;
- an invoice from the customer to Énergir claiming the financial assistance, plus applicable taxes (GST and PST).

Step 5

Validation of request and payment of financial assistance to customer or request for modification

Énergir analyzes the measures implemented and if the file is considered satisfactory, i.e. it respects the performance conditions, Énergir so advises the customer and issues a cheque. If the scope of the measures was modified during implementation, then Énergir reserves the right to ask the customer to make certain modifications and to put the payment of the financial assistance on hold until the modifications have been implemented.

Post-implementation inspection

An inspection visit in the 12 months following implementation of the measures will be done by Énergir. Énergir will contact the resource-person identified on **Form I** to set a date for the inspection. During the inspection visit, the customer's resource-person must be able to show the Énergir representative conducting the inspection evidence that the measures for which Énergir has paid financial assistance have indeed been implemented. If this inspection reveals that the measures have not been implemented, the customer agrees to immediately reimburse the financial assistance granted by Énergir under this grant.



Steps to follow

Savings Monitoring

Additional mandatory steps for large-scale projects only :

Step 6

Submission of Savings Monitoring Report (Appendix 3)

After payment of the financial assistance for the measures implemented, the customer has 12 months to submit the **Savings Monitoring Report (Appendix 3)**, showing the results obtained, as well as any differences noted compared with the savings initially calculated.

Step 7

Analysis of the Savings Monitoring Report and request for modifications, if applicable/acceptance

Énergir analyses the **Savings Monitoring Report (Appendix 3)** and confirms in writing its acceptance (or denial) of the financial assistance and the amount granted.

Step 8

Submission of request to Énergir for payment of the financial assistance, along with supporting documentation for the savings monitoring

The customer completes the **Request for payment of financial assistance for monitoring savings (Form IVd)**.

This request must be accompanied by the following documents:

- a copy of invoices from suppliers for goods provided and/or services rendered;
- a copy of the bill from the customer to Énergir claiming the amount of the financial assistance for the savings monitoring, including applicable taxes (GST and PST).

Step 9

Validation of request and payment of financial assistance to the customer

Énergir analyses the request for payment and if it is judged satisfactory, that is, if it respects the execution criteria, Énergir advises the customer and issues a cheque.



Step 10

Post-implementation inspection

An inspection visit in the 12 months following implementation of the measures will be done by Énergir. Énergir will contact the resource-person identified on **Form I** to set a date for the inspection. During the inspection visit, the customer participating in the Implementation of Energy Efficiency Measures Grant must be able to show the Énergir representative conducting the inspection evidence that the measures for which Énergir has paid financial assistance have indeed been implemented.

If this inspection reveals that the measures have not been implemented, the customer agrees to immediately reimburse the financial assistance granted by Énergir under this grant.



Steps to follow



Forms

If you use **Version 12 of Acrobat Reader (or Professional)** you can complete, send (by e-mail), print, and save the various forms. When you have completed the forms, hit the Send button and you will be directed to an e-mail. You can then write a message and also enclose your other documents before you send the e-mail to Énergir.

Feasibility Studies

Before the work – new request for admissibility

- [Application for admissibility \(form I\) and Request for financial assistance \(form IIa\)](#)
- Attach the Service proposal

After completion – request for payment

- [Summary of measures covered by request for financial assistance \(form III\) and Request for payment of financial assistance \(form IVa\)](#)
- [Detailed report of costs \(form IIIa\)](#)

For participating customers only

- [Detail of internal resources \(form V\)](#)

Forms

Implementation of Energy Efficiency Measures

Before the work – new request for admissibility

- [Application for admissibility \(form I\), Request for financial assistance \(form IIb\) and Summary of measures covered by request for financial assistance – preliminary report \(form III\)](#)
- [Detailed report of costs – preliminary report of detailed costs \(form IIIa\)](#)
- Attach the study and/or calculations

For large-scale projects:

- [Savings Monitoring Plan \(Appendix 2\)](#)

After completion – request for payment

- [Summary of measures covered by request for financial assistance – final version \(form III\) and Request for payment of financial assistance & implementation certification \(form IVc\)](#)
- [Detailed report of costs – final version \(form IIIa\)](#)

Major Industries



Forms

For large-scale projects:

- [Report on savings monitoring – Appendix 3](#)
- [Request for payment of financial assistance \(form IVd\)](#)

Business

Preparation Guide

- [Preparation Guide – Studies component and Implementation component](#)

Major Industries

Appendix

Treatment of applicable taxes

Studies and implementation

As an enterprise registered for GST and PST and as a beneficiary of financial assistance offered under the above grant, we wish to inform you that in order to comply with the *Excise Tax Act* (GST) and the *Act respecting the Québec sales tax* (PST), an invoice addressed to Énergir must be submitted claiming the total amount of the financial assistance accorded.

- In order for Énergir to make the payment, the invoice must be presented in due form and contain the following information:
 - name of beneficiary of financial assistance (the customer);
 - address where work was carried out;
 - address of Énergir;
 - number and date of invoice;
 - description: *Financial assistance related to the Feasibility Studies and Implementation Grant*;
 - amount of financial assistance claimed and indicated in letter of acceptance from Énergir;
 - taxes payable on amount of financial assistance: GST and PST;
 - beneficiary's GST and PST account numbers;
 - indicate file number shown on acceptance letter.

The invoice must be sent to the following address with the **Request for payment of financial assistance (Forms IVa, IVc)**, following completion of the work.

Your accounting and tax specialists will be able to give you more details concerning this specific procedure and the tax treatment of the financial assistance. Please do not hesitate to consult them.

[Download the invoice template to be completed](#)

To submit a request or for any administrative information regarding an application:

By e-mail:

energyefficiency@energir.com

By phone:
514 598-3410