



# Energy Efficiency Program – Energy Analysis and Implementation Participant’s Guide

Business and Major Industries Markets

Recommissioning of Building Mechanical Systems 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.

The *Participant's Guide* is intended for customers who wish to get a Recommissioning of Building Mechanical Systems Grant. It explains the steps to follow to make a request for financial assistance as well as the eligibility criteria.

Also included are the forms required to request financial assistance. Énergir encourages participants to submit their applications electronically, along with supporting documents.

The conditions for participation came into effect on **November 7, 2019**. 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.

## Business and Major Industries Markets



For more information

### For more information, consult:

- your commercial representative
- the Énergir DATECH team of engineers
- your Major Industries sales representative
- [energir.com/recommissioning](https://energir.com/recommissioning)

### To submit requests or for any administrative information regarding an application:

#### By e-mail:

[energyefficiency@energir.com](mailto:energyefficiency@energir.com)

#### By mail:

Énergir  
Energy Efficiency Department  
1717 du Havre  
Montréal, Québec H2K 2X3

#### By phone:

514 598-3410



Description and objective

## Description and objective

The recommissioning of building mechanical systems – also simply called “recommissioning” or “RCx” – is a process that aims to optimize a building’s existing systems by improving their energy efficiency, putting the emphasis directly on equipment performance and on integrating the systems. The process consists of examining the operation and maintenance of the building’s systems, explaining how they should work, and defining the means by which their performance will be optimized.

The approach reviews the overall performance of the building’s mechanical systems, considered as a group of integrated systems.

Following the recommissioning of a building’s mechanical systems, the building’s optimal performance can be maintained through persistence strategies that call for continuous monitoring to ensure the savings are long lasting.

A recommissioning project has five phases: planning, investigation, implementation, transfer, and continuous monitoring. The grant focuses on these five phases, as described below.

**Planning** corresponds to the preparations for a recommissioning project. It includes establishing the project’s objectives, choosing a certified RCx agent, preparing an energy performance profile, forming a project team, and developing a recommissioning plan. This plan must accompany the Application for Admission to the grant.

During the **investigation** phase, the agent carries out several tasks. First, he studies<sup>1</sup> the available documentation about the building and establishes a diagnostic of the building’s various mechanical systems. The agent then selects and prioritizes the measures that offer energy efficiency opportunities for the building. Lastly, he draws up a final Plan for implementing the measures identified, as well as persistence strategies to ensure that the energy savings are long lasting.

## Business and Major Industries Markets



### Description and objective

In the **implementation** phase, the agent implements the measures selected, then the persistence strategies.

In the **transfer** phase, the agent works with the client to ensure that the documentation on the building's mechanical systems is updated. This step may include training the personnel responsible for managing the building to transfer the knowledge needed to ensure that the persistence strategies are put into practice every day.

**Continuous monitoring** is aimed at ensuring that the measures implemented are uninterrupted in order to guarantee the persistence of the savings over the medium term. The agent must therefore put in place a series of performance indicators designed to reveal any anomalies so he will be able to analyze the cause of deficiencies observed in the building. As well, the agent will work with the technical personnel throughout the continuous monitoring and take any corrective action needed.



## Special clause

The terms and conditions outlined in this guide are applicable to any new request received after November 7, 2019. Requests received before that date are subject to those in effect before November 7, 2019.

Énergir reserves the right to modify the grant or cancel it at any time without prior notice. However, all requests for participation in the grant that have already been accepted by Énergir before its cancellation will be processed. Also, Énergir reserves the right to interpret the terms and conditions of the grant, taking into account any other condition potentially prescribed by the Régie de l'énergie.



Eligibility criteria

## Eligibility criteria

1. The applicant must be a current Énergir customer.
2. The grant is aimed at buildings or groups of buildings with natural gas consumption of at least 75,000 m<sup>3</sup> per year. On the specific approval of Énergir, certain buildings with annual natural gas consumption below 75,000 m<sup>3</sup> could be eligible.
3. The building in question must not have been the subject of an agreement for the payment of financial assistance during the preceding five (5) years as part of an application under the Recommissioning Grant or the New Efficient Construction Grant.
4. The project must be managed by a certified recommissioning (RCx) agent, and accredited by the Ministère des Ressources naturelles.
5. The request for financial assistance must be submitted before the recommissioning project is started and the Application for Admission and Simplified Plan forms must be duly completed and in compliance. Also the request must not cover a project that is the subject of a request for financial assistance under the ÉcoPerformance program for the Recommissioning of Mechanical Systems.
6. The potential energy savings shown in the Plan are judged satisfactory by Énergir.
7. Any measure calling for the substitution of one energy source by another is excluded.
8. Measures related to equipment replacement, to procedures, tariff optimization or maintenance are not eligible.
9. Measures eligible for Énergir's prescriptive programs, or for studies, encouragement and implementation grants, are excluded from the Recommissioning Grant.
10. On the specific approval of Énergir, energy services companies (also called ESCOs or ESCOs) may ask for a grant. For an application to be eligible, they must submit the invoices and supporting documents required for each phase of the grant.
11. The applicant must agree to complete all the phases of the grant, failing which, Énergir reserves the right to cancel the application and to request the reimbursement of any sums already paid.
12. Énergir reserves the right to retain some of the financial assistance or to require a modified payment agreement in the case where the financial assistance ceiling has been reached before the end of the project.
13. All phases of the grant must respect the norms and regulations in effect. Énergir reserves the right to interpret the terms and conditions of the grant.



Financial assistance

# Financial assistance

The financial assistance awarded by Énergir for the Recommissioning of Mechanical Systems Grant is divided into four parts:

Recommissioning phase of the project	Terms of payment of financial assistance
Investigation	50% of eligible costs
Implementation	\$0.30/m <sup>3</sup> saved up to 50% of eligible costs <sup>2</sup>
Transfer	50% of eligible costs
Continuous monitoring	50% of eligible costs <sup>3</sup>

**Financial assistance ceiling for the project: \$100,000**

## Investigation

The financial assistance that will be paid for the investigation corresponds to 50% of the eligible costs for this phase.

## Implementation

The financial assistance that will be paid for this phase varies depending on the natural gas saved. It corresponds to \$0.30/m<sup>3</sup> of natural gas saved in the first year following the implementation of the recommissioning measured approved by Énergir and whose payback period (PRI<sup>4</sup>) is longer than or equal to one year. However, the amount granted for this phase is limited to 50% of the implementation costs of the eligible measures.

## Transfer

The financial assistance that will be paid for the transfer corresponds to 50% of the eligible costs for this phase.

$$PRI = \frac{\text{Implementation costs of recommissioning measure}}{\text{Annual natural gas savings (\$) associated with the measure}}$$

<sup>2</sup> For measures with a payback period longer than or equal to one year  
<sup>3</sup> Mandatory monitoring for 2 years and possibility of voluntarily extending the monitoring up to a maximum of 10 years in total.  
<sup>4</sup> Payback period: Period that must elapse before the value of the annual natural gas savings associated with the measure are equal to the implementation costs of that measure.



Financial assistance

### Monitoring persistence of measures

The final part of the financial assistance covers the continuous monitoring of the measures implemented. The monitoring phase may extend over a maximum of 10 years. A minimum 2-year monitoring period is mandatory in order to receive the financial assistance. The final part of the financial assistance corresponds to 50% of the eligible costs for this phase. The eligible costs include the professional consulting fees for carrying out the monitoring as well as producing the annual monitoring report.

### Maximum ceiling and combination of financial assistance from other organizations

The total financial assistance paid by Énergir for all the phases is limited to \$100,000 per project.

The financial assistance awarded by Énergir may be combined with financial assistance from complementary programs offered by other energy distributors or government organizations, except those offered by the ÉcoPerformance program. The cumulative total of financial assistance obtained must not exceed 75% of the eligible costs. Otherwise, Énergir will pay the customer the financial assistance envisaged minus the contributions paid by other organizations so that the portion payable by the customer represents at least 25% of the eligible costs.



# Completion steps and deliverables

## Opening of application

### Step 1a

#### Submission of request for financial assistance to Énergir

The applicant and his accredited agent submit a request for financial assistance to Énergir by completing the **Application for Admission (Tab 1 of Application for Recommissioning Grant – Form I)**, which must be accompanied by the **Simplified Plan (Form II)** or by a planning report that includes the information required in the **Simplified Plan**. The applicant must submit the **Application for Recommissioning Grant** in Excel, along with the Simplified Plan as a PDF file.

The Plan must contain:

- A description of the building (year of construction, square footage, vocation);
- A description of the building's mechanical systems and a list of the heating, ventilation and air conditioning systems (HVAC);
- An energy consumption profile before the project is carried out;
- The scope of the investigation of the mechanical systems envisaged and the investigation method to be employed;
- A timetable for the completion of the various phases of the project;
- An estimate of the costs of each phase of the project.

In submitting his application, the customer acknowledges having read and agreed to the Grant's eligibility criteria.

### Step 1b

#### Analysis of Application for Admission and request for modifications, if applicable/acceptance

Énergir analyzes the request for financial assistance based on the eligibility criteria and confirms (in writing) the acceptance (or refusal) of the financial assistance, the amount awarded, the timeframe for completion and a reminder of the completion conditions.

The applicant agrees that Énergir may request the accredited agent to provide details about the contents of the plan or to make any modifications judged necessary to ensure that the project respects the good practices of a recommissioning approach.



### Completion steps

## Investigation

### Step 2a

#### Investigation of the building

Following confirmation of eligibility by Énergir, the accredited agent has six (6) months to carry out the investigation and produce his investigation report, in accordance with the Plan. The customer must advise Énergir in the event this timeframe cannot be respected. Beyond that date, Énergir reserves the right to refuse to pay the financial assistance.

### Step 2b

#### Submission of investigation report and Implementation of Recommissioning Measures to Énergir for approval

The accredited agent submits his investigation report to Énergir. The applicant agrees that Énergir may request the accredited agent to make modifications to the report in order to respect the Plan.

The investigation report must contain:

- An energy performance profile comparing consumption before the work (based on actual data) with consumption after the work (based on estimated data) for each energy source used (with a detailed list of the equipment that consumes energy and a breakdown of energy consumption between the principal systems);
- An inventory of the energy improvements identified, with justifications and calculations of energy savings;
- An implementation plan and a timetable for the measures envisaged;
- A recapitulation of the costs of the project with a bill for fees for support services;
- Details of the parameters and performance indicators to be monitored and the method chosen for verifying the persistence of the measures implemented and energy performance;
- A description, provided by the accredited agent, of the transfer strategies planned for each measure, including training, technical support, updating of plans and operating manuals, as well as documentation of good practices.
- A brief description of the monitoring protocol for each measure, and the number of years planned for continuous monitoring.

The accredited agent also submits the **Application for Recommissioning Grant** by completing **Tab 2: Declaration of costs of investigation** and **Tab 3: Register of preliminary measures**. The form must be in Excel.

This form must include:

- Details of the costs associated with the investigation phase.
- An estimate of the costs for the transfer and continuous monitoring phases, as well as the number of years of monitoring planned.



### Completion steps

- Details of all the energy efficiency measures identified and defined in the investigation report by the agent, specifying which measures will be implemented;
- Details of the savings (all sources combined) and costs associated with each measure defined in the investigation report.

## Step 2c

### Analysis of investigation report and request for modifications, if applicable/acceptance

Énergir analyzes the report and verifies that it respects the Plan. In the case where the scope of the investigation has been modified along the way, or if the report is judged unsatisfactory, Énergir reserves the right to request the accredited agent to make certain adjustments or modifications to the report and, if necessary, to suspend the request for financial assistance until receipt of a version considered acceptable.

## Step 2d

### Submission of documents and supporting documents for payment of the first part of the financial assistance

Once the investigation report and the related documents have been judged satisfactory by Énergir, the applicant may submit the **Request for payment (Tab 6 of Application for Recommissioning Grant)** for the investigation phase.

The form must be accompanied by the following documents:

- A copy of the bill sent to the applicant by the accredited agent covering his consulting fees for the project, plus the applicable taxes (GST and QST);
- A bill from the applicant to Énergir claiming the amount of financial assistance, plus the applicable taxes (GST and QST).

## Implementation and transfer

## Step 3a

### Implementation of Recommissioning Measures

From the date of confirmation by Énergir of the payment of financial assistance for the investigation phase, the applicant has two (2) years to complete the implementation of the recommissioning measures approved in the preceding phase. The customer must advise Énergir in the event this timeframe cannot be respected. Beyond that date, Énergir reserves the right to refuse the payment related to the implementation of the measures.



### Completion steps

## Step 3b

### Submission of report on implementation of measures to Énergir for approval

The accredited agent submits the implementation report to Énergir. The applicant has two (2) years from acceptance of the payment of the first part of the financial assistance to produce the report on the implementation of the recommissioning measures approved in the preceding phase. The implementation report must contain:

- A summary statement of the implementation of the measures with supporting bills;
- Any change from the measures approved at the investigation phase (measures not implemented or modified and difference in costs) with the new energy savings calculations, if applicable;
- The transfer and persistence strategies put in place.
- Include a description and details of the realizations/services/activities completed in the transfer phase, as well as the associated costs.

The accredited agent must also submit:

- The **Application for Recommissioning Grant** by completing **Tab 4: Declaration of final measures**, and **Tab 5: Declaration of transfer costs**. The form must also be submitted in Excel;
- Along with the bills for the measures completed in the implementation phase.

## Step 3c

### Analysis of implementation report and request for modifications, if applicable/acceptance

Énergir analyzes the report and verifies that it respects the Plan. In the case where implementation of the measures has been modified along the way, or if the report is judged unsatisfactory, Énergir reserves the right to request the accredited agent to make certain adjustments or modifications to the report and to suspend, if necessary, the request for financial assistance until receipt of a version considered acceptable.



### Completion steps

## Step 3d

### Submission of documents and supporting documents for the payment of the second part of the financial assistance

Once the implementation report and the related documents have been judged satisfactory by Énergir, the applicant must submit the **Request for payment (Tab 6 of Application for Recommissioning Grant)** for the implementation and transfer phases.

The form must be accompanied by the following documents:

- A copy of the bill sent to the applicant by the accredited agent covering the implementation and transfer costs of the recommissioning measures, plus the applicable taxes (GST and QST);
- A bill from the applicant to Énergir claiming the amount of financial assistance for the implementation, transfer and monitoring phases, plus the applicable taxes (GST and QST).

## Project completion

## Step 4a

### Submission of reports on monitoring persistence measures implemented

Every year following the date of confirmation by Énergir of the payment of financial assistance for the implementation and transfer phases, and for the next **two (2) years**, the accredited agent must submit a monitoring report on the persistence measures implemented according to the strategies established in the investigation and implementation phases. The accredited agent may voluntarily submit a monitoring report on the persistence measures in the years following the project. The costs for the voluntary monitoring are eligible for financial assistance for a maximum of 10 years, including the 2 years of mandatory monitoring. However, the total financial assistance paid by Énergir for this project may not exceed the financial assistance ceiling of \$100,000.

The monitoring report must contain:

- A report on the status of the indicators related to monitoring energy performance, as defined in the persistence strategies in the preceding phases;
- An explanation of any differences or anomalies observed, compared with the report in the investigation report, the recommendations made to the applicant, the corrective action to be taken, as well as any changes required to procedures or the monitoring tools, if necessary.

The monitoring report must be accompanied each year by the **Summary of results of monitoring report on recommissioning persistence measures (Form III)** covering the monitoring of persistence measures implemented.



### Completion steps

#### Step 4b

##### **Analysis of monitoring report and request for acceptance/ modifications, if necessary**

Énergir analyses the Monitoring Report and confirms in writing its acceptance (or refusal) of financial assistance and the amount awarded.

#### Step 4c

##### **Submission of Request for payment of financial assistance for persistence monitoring**

Once the monitoring report is judged satisfactory by Énergir, the applicant must submit the **Request for payment (Tab 6 of Application for Recommissioning Grant)** for the continuous monitoring phase.

The form must be accompanied by the following documents:

- a copy of the bill sent to the applicant by the accredited agent covering the monitoring costs, showing the year of the project, plus the applicable taxes (GST and PST);
- A bill from the applicant to Énergir to claim the amount of financial assistance for the monitoring, as well as the applicable taxes (GST and PST).

Step 4 is repeated each year of continuous monitoring of the project (minimum 2 years, maximum 10 years).



# Forms

If you use **Adobe Acrobat Reader DC** 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.

In order to avoid any software incompatibility problems that may occur with some files, it is strongly recommended that you download and save the forms on your computer before completing them.

The **Application for Recommissioning Grant (Form 1)** is in Excel. This form will be updated at each step of the project and then submitted by e-mail.

## Step 1

### Plan

- [Form I – Application for Recommissioning Grant – Application for Admission \(Tab 1\)](#)
- [Form II – Simplified Plan](#)

## Step 2

### Investigation

- Form I – Application for Recommissioning Grant – Declaration of investigation costs (Tab 2), Register of preliminary measures (Tab 3) and Request for payment (Tab 6)
- Include: Investigation report

## Step 3

### Investigation & Transfer

- Form I – Application for Recommissioning Grant – Declaration of final measures (Tab 4), Declaration of transfer costs (Tab 5) and Request for payment (Tab 6)
- Include: Implementation report
- Bill for measures implemented

## Step 4

### Continuous monitoring

- Include: Monitoring report
- [Form III – Summary of results of monitoring report on recommissioning persistence measures](#)
- Form I – Application for Recommissioning Grant – Request for payment (Tab 6)

# Appendix

## Treatment of applicable taxes

### Recommissioning of Building Mechanical Systems

As a company registered for GST and PST and as the beneficiary of financial assistance offered under the above grant, we wish to inform you that, in order to respect the *Excise Tax Act* (GST) and the *Québec Sales Tax Act* (QST), a bill addressed to Énergir must be sent to Énergir for the total amount of financial assistance offered.

In order for the payment to be made, the bill must be drawn up in due and proper form and must contain the following information:

- Name of beneficiary of financial assistance (customer);
- Address of project;
- Énergir shown as addressee;
- Number of bill and date billed;
- Description: *Recommissioning of Building Mechanical Systems Grant*;
- Amount of financial assistance claimed and indicated in acceptance letter from Énergir;
- Taxes payable on the amount of financial assistance (GST, QST);
- Beneficiary's registration number for GST, QST;
- Reference to file number indicated on acceptance letter.

This bill must be transmitted to the following address, along with the **Request for payment of financial assistance tab6**, after each phase of the project.

Your accounting and/or 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.

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

**By e-mail:**

[energyefficiency@energir.com](mailto:energyefficiency@energir.com)

**By mail:**

Énergir  
Energy Efficiency Department  
1717 du Havre  
Montréal, Québec H2K 2X3

**By phone:**

514 598-3410