

Energy Efficiency Education Grant Program Guidelines

Supporting communities to build energy efficiency literacy

Communities are not just the places in which we live. Communities are also the groups of people that we gather with to share interests, passions, or purpose. We want to support the diverse communities in Alberta to engage in energy efficient actions in the places they work, live and play. The foundation of energy efficient actions is the understanding of how best to be energy efficient in those spaces.

Section 1 - Program Guidelines

Program Objectives

Organizations are eligible to receive funding to help Albertans build awareness, skills and capacity to take action on energy efficiency and renewable energy. For a project to be eligible, it must create a measurable impact and align with one or more of the following program objectives:

- Leverage education related to enhancing energy efficiency
- Build capacity in communities to deliver GHG reductions
- Reduce GHG emissions in a measurable way that leverages learning

Timelines for Funding and Completion

- Applications are now due December 31, 2018, by midnight (Mountain Standard Time).
- Applicants will be notified of the decision no later than January 31, 2019 by midnight (Mountain Standard Time).
- The suggested grant end date is March 31, 2020, by which time all work under the grant must be completed. For larger grant requests (closer to the maximum amount), we will consider grant end date extensions if valid reason is provided.
- Successful applicants must submit and complete a final report for their project by no later than 45 days past the grant completion date.

Eligibility

- Alberta registered community or educational organization, or delivering programs within Alberta
- Experience that demonstrates competency in delivering energy and environmentally focused education
- 2 million dollars liability insurance coverage
- Organizations must be in operation for a minimum of one year and be in good standing with required filings and their status.
- For those organizations working with vulnerable populations, a vulnerable sector check.

The list of types of organizations who should consider submitting an application includes, but is not limited to:

- Non-profit organizations

- Registered charities
- Co-operative organizations
- Community associations
- Educational groups or clubs (e.g. school clubs)
- Post-secondary education institutions
- Municipalities
- Indigenous community
- Education institutions (K-12)

We encourage partnerships. Applications must be a single proposal, with partners listed under the Project Personnel section. There must be a designated principle for each partnership to which grants funds are dispersed, who is accountable for management of those funds. For-profit companies can partner with eligible organizations to submit proposals; however, the proposal must be submitted by the eligible organization. Please contact program staff for further information.

Eligible Activities

The following types of activities are included as examples, and would be considered “project-based”:

- Education focused on the fundamentals of energy efficiency and/or renewable energy.
- Experiential, innovative activities or interactive learning tools that drives increased energy efficiency action.
- Awareness and monitoring of energy efficiency for buildings; includes technology, like meters, that facilitates learning.
- Training energy efficiency champions.
- Capacity building or technical training within or for use by businesses or organizations.
- Development of curriculum tied energy efficiency education materials
- Curriculum audit for energy efficiency and renewable energy content.

Be creative! We want to see programs that drive energy efficiency actions!

Ineligible Activities

The following are examples of activities that would rank low on the application scorecard:

- Event sponsorship
- Technology development
- Home or business retrofits

Program Overview

The Program will provide up to 100% of the eligible project costs, up to a maximum amount of \$125,000. Proposals will be evaluated by a selection committee based on established [criteria](#). The funds will be disbursed by January 31, 2019, based on descending evaluation score, until funds are exhausted.

The basic components of the Program include:

Part I: Application

- Applicants must complete the application form.

- See section 2 for a detailed list of proposal requirements. Must list partners and alternative funding sources and include an income statement.

Part II: Review

Once all applications are reviewed to confirm basic eligibility requirements are met, applications will be assessed by a review panel using Energy Efficiency Alberta's evaluation criteria.

- The applications will be assessed using the evaluation criteria in this document.
- Using the application scorecard, funding allocation will be determined by order of descending score, until funds are completely allocated.
- Submission of an application does not guarantee funding.
- The full Program terms and conditions will be developed by Energy Efficiency Alberta and shared with successful applicants.

Applicants may be contacted by a member of the review panel to provide clarification or further detail on their budget or proposed project.

Evaluation Criteria

The proposals will be assessed based on the following criteria, by a selection panel:

- Alignment with Energy Efficiency Alberta [mandate](#);
- Identifiable and measurable learning outcomes;
- Advances or innovation in energy efficiency or renewable energy literacy;
- What problem in the energy efficiency sector this program attempts to resolve or progress;
- Existing funding or contributions (including in-kind) towards the total project expenses from multiple sources;
- Who the proposed grant programming will impact* over a specified period;
- Demonstrated organizational ability and capacity to deliver, and within grant implementation timelines;
- Establishment in Alberta within the communities the organization serves; and
- Diversity of audiences.

Measurement of the following would be considered an asset:

- Demonstrable, verifiable GHG emissions reductions resulting from educational programming; or
- Verifiable energy savings (electricity, gas or water); or
- Jobs created.

*Note: impact means significant energy savings for the organization resulting from the educational initiative; or extent to which people participate in the project, affecting behavior; or breadth of people impacted (includes diversity and number).

Part III: Disbursement of Funds

Notification and payment will proceed as follows:

- Successful applicants will be contacted by the Program Administrator within approximately 60 days of the application closing date. The Program Administrator will email a copy of the approved

eligible grant agreement, including terms and conditions, to the organization. The organization must agree to the grant agreement, spend the grant funding according to the approved eligible budget and submit the interim and final report within the specified time frame.

- Unsuccessful applicants will be notified of the decision within approximately 60 days of the application closing date.
- When an application is approved, the participant will receive the funds after a grant agreement is signed.
- The funds will be disbursed via EFT.

Part IV: Project Execution

- The funding recipient will proceed with the execution of their proposed project as per the Energy Efficiency Alberta Grant Agreement.
- The grant agreements will include reporting requirements for financial information, progress based on agreed upon metrics and success stories and quotes.
- A pre-determined reporting schedule to be mutually agreed upon by the applicant and the Agency.
- The recipient may be required to provide:
 - Quarterly reports on project progress, budget spending, or how success metrics are being achieved.
 - Project data or results, including success stories, community outreach, number of impacted people, education materials or curriculum developed, GHG emissions reductions as a result of education, energy savings, jobs created, etc.
 - Any other reporting required as agreed upon by Energy Efficiency Alberta and applicant.
 - Please see [Reporting](#) for details on timelines.

Funding Parameters

- Energy Efficiency Alberta intends to provide upfront funding.
- Grant funding not used or accounted for in accordance with the approved eligible budget is repayable by the recipient to Energy Efficiency Alberta.
- The grant recipient is required to notify the Program Administrator if the project cannot be completed or the applicant organization or partner organization has ceased operations. If this happens, the applicant may be required to repay to Energy Efficiency Alberta a portion or all of the grant amount. The amount of funding to be repaid will be at the discretion of the Program Administrator.
- If the actual project costs are less than the approved budget, the applicant has two options:
 - Submit a written request to expand the scope of the project, and if approved, apply the unexpended funds to this purpose; OR
 - Return unexpended funds to Energy Efficiency Alberta once the final amount has been confirmed by the Program Administrator.

Program funding is limited, and not every eligible application will receive funding. The amount approved for each project may be less than the amount requested and is based on how closely the project meets

grant criteria, eligible expenses, the number of requests received and consideration for providing support across the province.

Eligible expenses

Eligible expenses include:

- Project planning expenses.
- Salary costs associated with the operation of the project.
- Travel expenses for project participants or personnel (must comply with the Government of Alberta Travel , Meal and Hospitality Expenses Policy).
<http://www.finance.alberta.ca/business/planning-accountability/accountability/GoA-Travel-Meal-and-Hospitality-Expense-Policy.pdf>
- Rentals related to program delivery.
- Project supplies and training materials.
- Content and technology development – could include subcontractor expenses
- Training to enable program development for program staff
- Administrative costs up to 10% of the overall grant amount

Ineligible expenses

Ineligible expenses include:

- Training or enrollment fees for individuals not connected to program deliveries
- In-kind expenses
- Payment for services that would normally be provided without charge (e.g. honoraria)
- Capital purchases or equipment
- Living allowances or expenses related to training activities
- Expenses related to non-program related facilities or premises (i.e. construction, rent, utilities)
- Costs associated with preparing funding applications and fundraising
- Alcohol
- Any expenses incurred prior to funding award
- Goods and Services Tax and the Harmonized Sales Tax

Grant Funding

Grant funding may be disbursed at Energy Efficiency Alberta's sole discretion. This contribution could be in the form of direct financial input to the project budget or in the form of services provided by the applicant organization in delivering the project. This requirement allows Energy Efficiency Alberta to support as many projects as possible and ensures that applicants undertaking large projects demonstrate their commitment to the work from inception.

Reporting

- Grant recipients will be required to submit interim and final reports for each funded project.
- The interim report must be submitted within 6 months after the start of the project or at the half way project milestone, whichever comes first.
- For grants closer to the maximum amount, Energy Efficiency Alberta may require quarterly reports.

- The final report must be submitted within 60 days after the project end date.
- Final and interim reporting templates will be available to grant recipients.

Important notes:

- The grant recipient must permit Energy Efficiency Alberta to examine, during regular business hours, the books or records relating to the expenditure of the grant to determine if the grant has been properly spent.
- Records should be kept for seven years following completion of the project.
- The interim and the final reports must be properly completed and signed by an authorized signing authority of all partners who signed the original application.
- The Program Administrator reserves the right to request additional interim reports.

Additional Information

Appeals

All grant application approval decisions made are final and appeals will not be accepted.

Freedom of Information and Privacy (FOIP)

The FOIP Act applies to any information that is provided to Energy Efficiency Alberta. This information may be disclosed in response to an access request under the FOIP Act, subject to any applicable exceptions to disclosure under the Act. The personal information that is provided on the grant application form will be used for the purpose of administering the Education Grant 2 program. It is collected under the authority of section 33(c) of the Freedom of Information and Protection of Privacy Act and is protected by the privacy provisions of the Act. Questions regarding FOIP can be directed to the Program Administrator.

Section 2 - Application Evaluation Overview

The application form and free form proposal will be used to provide all the information needed for Energy Efficiency Alberta to evaluate your proposal; you will be required to provide all the information requested in the sections listed below. **All fields are required** unless otherwise specified:

Organization Information: This section will collect basic information on the applicant organization to determine its basic eligibility to receive funding, as well as information regarding the organization's experience and capabilities. This section will be used to assess whether the organization has demonstrated the ability to deliver community focussed projects.

Project Description: This section will provide high-level information about the proposed project including a basic project schedule to which the applicant will be held accountable. This section requires the applicant to attach a project schedule which presents a timeline for activities and dates for key milestones. This section will be assessed based on the project objectives and schedule.

Project Objectives and Outcomes: This section will be used to assess the project's primary objectives, how they will be measured, how target groups will benefit, how the project's activities will strengthen Energy Efficiency Alberta's mandate and the benefits the project will deliver to the community. This section should also include a description of the target audience, as well as the proposed reach of the education over time.

Project Personnel: This section lists the project manager, planned suppliers, and partners. It will be assessed based on the appropriateness and qualification of the individuals, businesses, and organizations chosen to deliver the proposed project.

Needs and Risks Identification: This section will give an overview of identified needs that have prompted the need for the proposed project, as well as risk factors and mitigation approaches. This section will be used to assess whether the applicant has completed sufficient research to ensure achievement of project objectives and successful delivery of the project.

Budget: This section will be evaluated based on the reasonableness of the expenses listed given the project's schedule and objectives (i.e. value/impact for money.)

Glossary (optional): This section will be used to help the Energy Efficiency Alberta understand terms in the proposal that may be unique to the organization, have multiple meanings in different contexts or ambiguous meaning.

We encourage applicants, in their written proposal, to be creative. Include text, images, links to videos, anything you feel captures the spirit and intent of your proposed project!

Section 3 – Definitions

Applicant: The applicant is considered to be the organization who will be responsible for the funding.

Community Organization: Any organization eligible for the program based on the program Terms and Conditions of the Energy Efficiency Alberta Grant Agreement.

Contract Start Date: The date listed on the funding agreement as the start date.

Contract End Date: The date listed on the funding agreement as the end date.

Cost: means costs, expenses, fees, taxes, rates, in-kind payments, or other consideration of any kind.

Eligible Expense: Please see Appendix A for an outline of which expenses are eligible.

Energy Efficiency Alberta: Arms-length agency of the Province of Alberta.

Project schedule: The schedule must outline each of the tasks needed to complete the project, providing the timing and the sequence for each task.

Funding: Any monies provided by the Energy Efficiency Alberta for the purposes of funding a proposed project.

Ineligible Expense: Please see the [Ineligible Expense](#) section for an outline of which expenses are ineligible.

Partnering Organization: An external resource providing products or services to the project on a not-for-profit basis. The Recipient may use funds to pay partnering organizations for any eligible expenses they incur.

Project Manager: The individual who will serve as the point of contact for the project, and who is expected to have a significant day-to-day involvement in the project.

Project: The name for the proposed activities following the signing of the funding agreement.

Proposed project: The name for the proposed activities in the application form prior to being provided with funding.

Proposal: The content within a submitted application form is considered the Proposal.

Reach: How many people the grant funding impacts, either directly (through training) or indirectly (social media, Facebook, etc.)

Recipient: The organization identified as the Recipient(s) on the cover page to the Funding Agreement.

Signing Authority: An individual with the legal authority to bind the community organization to the terms of the program.

Travel, Meal, and Hospitality Expenses Policy: Refers to the Government of Alberta's Travel, Meal, and Hospitality Expenses Policy, which is amended from time to time, and can be found at the following link: <http://www.finance.alberta.ca/business/planning-accountability/accountability/GoA-Travel-Meal-and-Hospitality-Expense-Policy.pdf>