

Frequently Asked Questions

Energy Partnerships Program

These FAQs are not binding on the IESO and in no way vary or impact the interpretation of the EPP Rules and Funding Agreement. In the event there is any conflict or inconsistency between this document and the EPP Rules and Funding Agreement, the terms in the EPP Rules and Funding Agreement will govern.

Capitalized terms used but not defined in this document that are defined in the EPP Rules (the “Rules”) have the meanings given to them in the Rules.

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- I incurred expenses for eligible EPP activities prior to applying and following the Eligible Funding Date, how do I apply to the Energy Partnership Program for re-imburement?

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- **What is the Evaluation Schedule for EPP? What does it mean if I submit my application after the “Submit By” date?**

Partnership Stream FAQs

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- If I receive funding from other sources related to exploring Project Partnerships, am I ineligible to receive funding from the IESO?
- Do I need to have already applied to the FIT Program, or received a FIT Contract in order to apply to the Partnership Stream of EPP?
- If I don't submit an Application by the Application Window Deadline, what implications will this have on my Eligible Funding Date?

Recently Added

- **I am applying to the Partnership Stream for funding and one of my activities will be to develop an Offering Statement as part of developing the organization structure for the entity that will hold Economic Interest in, and/or, Control the entity that owns the Project. What do I attach in the Attachments Checklist for an “Offering Statement”?**

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- What type of Remote Energy Projects would be eligible under this stream?
- Will pre-feasibility assessments be an Eligible Activity?

- How long does an approved Remote Community have to complete the work once funding has been awarded?
- Does the proposed energy solution need to be a FIT recognized technology?

Program Launch FAQs

Why was the EPP launch delayed?

After the Draft EPP Rules were posted in May 2015, the IESO undertook a comprehensive review of all existing Funding Support Programs in an effort to continue to look for efficiencies and improvements within the EPP. The IESO continued to develop the EPP to ensure that the new consolidated and streamlined rules were reflective of any findings and potential improvements from this review.

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How have the Rules changed since the draft Program Documents were posted in May 2015?

The IESO has taken stakeholder feedback into consideration and updated items such as: Eligible and Ineligible Expenses, timelines for reimbursable funding, Application requirements, and streamlining the Rules overall to make them easier to understand. A summary of changes is available on the EPP website.

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Has the IESO made any reimbursement funding available in light of the delay of the EPP launch?

Yes, the Eligible Funding Dates for Internal and External Expenses for each EPP stream have been revised. The updated Eligible Funding Date is outlined in the EPP Rules for each stream.

Given that the Partnership Stream and Project Development Stream were not launched in 2015 as intended, and given the anticipated funding needs for 2016, on June 10, 2016, the Minister of Energy directed the IESO to allocate the \$4 million in unspent Support Programs funds from the 2015 budget to the \$10 million annual Support Programs budget for 2016, increasing the 2016 budget from \$10 million to \$14 million.

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How soon can we apply for funding?

The EPP Rules were posted to the website on June 13, 2016. The Application Window will be open as of June 27, 2016. The EPP will accept Applications on a continuous basis after June 27, 2016.

A schedule of Application review dates will be posted on the EPP website when the Application Window opens on June 27, 2016.

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When do you expect first contracts to be offered in EPP?

It is anticipated that Funding Agreements will be offered in the third quarter of 2016.

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How will I be notified when the EPP launches? Is there a subscriber list?

The EPP launch will be posted on the IESO's website and the IESO's Facebook and Twitter pages. In addition, the IESO will issue communications via the EPP subscriber list. Please ensure you subscribe to be notified of updates to the EPP through the EPP website.

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If an Applicant submits an Application for funding, can they also apply to other non-IESO Funding Programs in relation to this project?

Yes, but where the Applicant has received or expects to receive additional government funding (e.g., from any of the federal, provincial or municipal governments, or any of their agencies) in relation to an Eligible Activity where funding is also being requested under EPP, the Applicant is required to disclose such sources of funding to the IESO as part of the Application.

The IESO has the sole and absolute discretion not to award funding for any activities that are, or are perceived to be, duplicative of funding received from any other source.

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General EPP FAQs

What kinds of costs will be eligible for funding under the EPP?

Costs eligible for funding within each stream include:

Partnership Stream: Legal, technical and financial due diligence costs involved in exploring Project Partnerships.

Project Development Stream: Soft costs associated with developing a renewable energy project, such as obtaining the requisite regulatory approvals.

Remote Project Development Sub-Stream of the Project Development Stream: Costs associated with developing an energy project to offset diesel use in Remote First Nations Communities, including activities such as early stage business planning and assessments.

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If I have multiple FIT projects, do I need to fill out separate Application Forms?

Applicants may submit a single Application Form for a Project Portfolio consisting of four or more FIT projects of the same renewable fuel. Applicants with one to three FIT projects must submit separate Application Forms for each project. The forms will be available once the Application Window opens on June 27, 2016.

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Are Tribal Councils and Political Territorial Organizations eligible as FNM Organizations for Identified Transmission Projects in the EPP rules?

The eligibility of all First Nation and Métis (FNM) Organizations, including Tribal Councils and Political Territorial Organizations, will be evaluated on a case by case basis. The FNM Organization must represent the interests of more than one First Nation and Métis Community in the sole and absolute discretion of the IESO.

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Is there any population size limit for municipalities applying to EPP?

There is no size limit for Municipalities in the EPP.

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I have an older Funding Agreement not yet completed in another IESO Support Program. Does this hinder my ability to receive EPP Funding?

In order to be eligible to receive funding under EPP, prior IESO funding recipients must:

- Have completed any previous Funding Agreements,
- OR**
- Not be in Default with regard to any Funding Agreements entered into between the Recipient and the IESO.

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When do I have to go through the Competitive Procurement Process?

If external service providers are being retained to undertake work on the Project, and the total cost of these services is greater than \$15,000, a Competitive Procurement is required.

Where the provider of goods or services has been providing this type of service to the Applicant prior to January 1, 2016, a Competitive Procurement is not required, provided the Applicant provides supporting evidence of the pre-existing relationship.

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Will I have to provide evidence for my expenses?

All Applicants are required to provide supporting documents to evidence the costs and expenses being funded by the EPP. Expenses must be evidenced by timesheets (for internal employees), supporting receipts, invoices, and proof of payment as set out in the Funding Agreement or as otherwise required by the IESO.

The successful funding recipient will also have to provide Deliverables and a Summary Report related to the Eligible Expenses. The form of the Deliverables will be set out in the Funding Agreement.

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If we received funding for our project under a previous IESO Support Program, can we receive funding under the EPP?

Applicants who have received funding under a Support Program such as the AREF, CEPP, MPSEPP or ATF-Reimbursement Program may apply for funding under the EPP for new Project Partnerships and Projects not yet funded.

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How will the budget allocation for EPP be communicated?

All EPP materials, including the budget allocation, program guidelines and Application Forms, will be posted to the EPP website when the EPP opens the Application Window on June 27, 2016. The budget allocation is reviewed quarterly by the IESO and is subject to change as streams fill.

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How does the Application review process work?

Applications will go through a three-stage review process:

In the first stage, the IESO will assess whether the Application is complete and eligible for further review.

In the second stage, the third-party review committee will review the Applications in timestamp order by the Applicant Type. The review committee will make recommendations to the IESO on whether the Applicant should be funded and the amount of funding to be awarded.

If approved, Applicants will receive an approval letter followed by an offer to enter into a Funding Agreement. If rejected, Applicants may submit a new or revised Application, which will receive a new Timestamp and be subject to the Program Rules at the time of submission.

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How is the Application timestamp determined?

An Applicant will receive a timestamp based on the date and time the Application has been received by the IESO by email or by mail/courier. If the Application requires clarification, the timestamp will change to the date and time the clarification has been received. This process may continue until the IESO has determined the Application has met all completeness and eligibility requirements.

The IESO encourages all Applicants to review the EPP Rules and Application Guidelines in order to submit complete Applications and maintain their original timestamp.

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Will the budget allocation be grouped by Applicant Type?

Yes, each Applicant Type will be allocated a specific portion of the overall annual EPP budget.

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If I am working with other eligible Applicants in exploring Partnerships for the same Renewable Energy or Transmission Project, does each Applicant need to submit their own Application?

No, when working collaboratively with other eligible Applicants, you may submit one Application on behalf of all Applicants. A Lead Applicant must be selected, and all other Applicants will be considered "Joint Applicants."

If the Application is approved, all Joint Applicants will be required to sign the Funding Agreement.

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If I submit an Application with Joint Applicants that are a different Applicant Type, which budget allocation will the Application be reviewed in?

Joint Applications with different Applicant Types will be grouped to the budget allocation of the Lead Applicant. For example, if a Municipality and Public Sector Entity submit a Joint Application, and the Municipality is designated as the Lead Applicant on the Application Form, the Application will be grouped into the Municipality budget allocation.

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If an applicant type budget allocation does not get fully used, will the remaining amount be transferred to an applicant type budget allocation that is oversubscribed?

The IESO may revise and/or replace the budget allocation schedule, in its sole and absolute discretion, from time to time. Applications will be subject to the Support Programs Budget in effect as of the date the Application is submitted to the IESO.

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What is a Supporting Resolution?

Supporting Resolutions differ between Applicant Type. Please review a summary of the following Supporting Resolutions;

First Nation and Métis Community

A band council resolution or an equivalent resolution that is acceptable to the IESO in its sole and absolute discretion.

FNM Organization

A resolution of the board of directors, as well as a band council resolution or an equivalent resolution that is acceptable to the IESO in its sole and absolute discretion from each First Nation and Métis Community represented by the FNM Organization.

Municipality

A bylaw passed by a Municipality.

Co-operative

A resolution of the governing board of the Co-operative.

Public Sector Entity

A resolution of the board of directors or a letter of support from the Public Sector Entity that is otherwise acceptable to the IESO in its sole and absolute discretion.

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I incurred expenses for eligible EPP activities prior to applying and following the Eligible Funding Date, how do I apply to the Energy Partnership Program for re-imbusement?

Applicants who have incurred costs for eligible activities prior to applying and following the Eligible Funding Date must complete the Application and show a Work Plan of work completed, a Budget of expenses incurred and a Project Team of internal and external service providers who undertook the work.

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What is the Evaluation Schedule for EPP? What does it mean if I submit my application after the “Submit By” date?

The Evaluation Schedule sets out the cycles of application submission dates and evaluation schedule to help guide applicants in submitting an Application. The Evaluation Schedule helps Applicants understand when their Application will be reviewed and when they can expect to hear a funding decision on their Application.

The “*Submit By*” date and the “*Application Review Meeting Date*” set out when an Application will be reviewed by the Review Committee, if the Application is received by the IESO on or before the “Submit Date” for that cycle.

Applications are accepted on a continuous basis and Applicants who submit an Application after the “Submit By” date for a particular cycle will still be accepted and reviewed in the next cycle.

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Partnership Stream FAQs

What can I receive funding for under the Partnership Stream?

The Partnership Stream provides funding for legal, technical and financial due diligence costs involved in exploring Project Partnerships when developing a FIT Project, LRP Project, or Identified Transmission Projects.

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Who is eligible for funding under the Partnership Stream?

First Nation and Métis communities and Organizations can receive funding when exploring Project Partnerships related to a FIT Project, an LRP Project, or an Identified Transmission Project.

Renewable Energy Co-operatives, Municipalities, and Public Sector Entities can receive funding when exploring Project Partnerships related to a FIT Project.

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What is an Identified Transmission Project?

An Identified Transmission Project is a future, planned, major transmission line that is determined by the Ministry of Energy to be a priority. This includes the following;

- The East-West Tie Expansion Line
- The Transmission Line to Pickle Lake
- The Northwest Bulk Transmission Line; and

- Remote Community Connections.

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What if an Applicant is pursuing a Transmission Line that is not an Identified Transmission Project?

Applicants who are pursuing other Transmission Lines not included in the Identified Transmission Lines are encouraged to contact EPP staff. The IESO will work the Ministry of Energy, who determines which transmission lines are priorities, to determine if the Transmission Project is eligible for EPP funding.

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What is a licensed transmitter?

A licensed transmitter is an entity that has been approved to transmit electricity in Ontario and has received an Electricity Transmitter Issued License by the Ontario Energy Board (OEB).

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Can I apply for Partnership funding for more than one renewable energy project?

Funding for the Partnership Stream is based on the number of FIT or LRP Projects being pursued. Applicants are limited to one Application for funding up to the lesser of \$50,000 or 80 percent of Project Expenses for the Partnership Stream, regardless of the number of Projects or Proposed Project Partners.

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If I receive funding from other sources related to exploring Project Partnerships, am I ineligible to receive funding from the IESO?

You may still receive funding from the IESO as long as the funding is not duplicative. You must identify the source and amount of additional funding contributions in your Budget when submitting an Application.

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Do I need to have already applied to the FIT Program, or received a FIT Contract in order to apply to the Partnership Stream of EPP?

The Partnership Stream is open to Eligible Applicants who are pursuing a FIT Project including those who have not yet applied to the FIT Program, but intend to do so.

Please note, Eligible Applicants must be able to prove that they, or their Proposed Project Partner have Access Rights to the Project Site; and demonstrate a reasonable likelihood, in the sole and absolute discretion of the IESO, of being able to connect the FIT Project to a Distribution System.

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If I don't submit an Application by the Application Window Deadline, what implications will this have on my Eligible Funding Date?

The Partnership Stream is open to Eligible Applicants who are pursuing a FIT Project including those who have not yet applied to the FIT Program, but intend to do so.

Please note, Eligible Applicants must be able to prove that they, or their Proposed Project Partner have Access Rights to the Project Site; and demonstrate a reasonable likelihood, in the sole and absolute discretion of the IESO, of being able to connect the FIT Project to a Distribution System.

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I am applying to the Partnership Stream for funding and one of my activities will be to develop an Offering Statement as part of developing the organization structure for the entity that will hold Economic Interest in, and/or, Control the entity that owns the Project. What do I attach in the Attachments Checklist for an "Offering Statement"?

Co-ops who will be developing an Offering Statement as part of their Eligible Activities are not required to attach the draft or final Offering Statement to their Application if they do not yet have one. The Partnership Stream Application has been updated to reflect a "Not Applicable" option in the Attachments Checklist.

Co-ops who will be updating an Offering Statement as part of their Eligible Activities must submit a copy of the draft or final Offering Statement that is being updated to their Application.

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Project Development Stream – FAQs

Who is eligible for funding under the Project Development Stream?

First Nation and Métis Communities, Municipalities, Co-operatives or a Public Sector Entity, or a Legal Entity wholly-owned and Controlled by any one of the above eligible groups are eligible to apply for funding under the Project Development Stream of the EPP.

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What types of Projects are funded under the Project Development Stream?

Eligible Applicants that are developing a Renewable Energy Project with a FIT Contract or a Portfolio of renewable energy projects with FIT Contracts may be eligible to apply.

Please note, microFIT Projects are not eligible for the EPP.

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What costs are eligible for funding under the Project Development Stream?

In the Project Development Stream, assistance may be provided for the costs associated with developing a renewable generating facility. These activities can include resource assessments, engineering and design studies, and required regulatory approvals, among others.

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Can we apply to the EPP for more than one Project?

Funding under the Project Development Stream of EPP allows for Applicants to submit one Application for four (4) or more FIT Contracts using the same technology within the same FIT Application Period which are classified as a Portfolio.

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Will I need to have been awarded a FIT Contract before I can apply for Project Development funding?

Yes, in order for an Applicant to be eligible for funding under the Project Development Stream, the Applicant or the relevant FIT Supplier must hold a FIT Contract or have been awarded an Offer Notice with regard to a FIT Contract.

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Remote Project Development Sub-Stream – FAQs

Which First Nation and Métis are eligible to submit an Application to the Remote Project Development Stream?

The four Remote Communities identified in the IESO's *Remote Community Connection Plan* where future transmission connection was determined to be uneconomic. These include:

1. Gull Bay First Nation (Kiashke Zaaging Anishinaabek)
2. Weenusk First Nation (Peawanuck)
3. Whitesand First Nation
4. Fort Severn First Nation

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How much funding will be available to each of the four (4) remote communities?

Each of the four (4) Remote Communities may be eligible for up to \$500,000 at 100% of Actual Project Expenses.

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What type of Remote Energy Projects would be eligible under this stream?

Any Project that intends to supply energy directly to the Community and will offset the use of diesel for electricity generation would be eligible.

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Will pre-feasibility assessments be an Eligible Activity?

Yes, pre-feasibility and early stage business planning are Eligible Activities under this Sub-Stream.

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How long does an approved Remote Community have to complete the work once funding has been awarded?

Once approved for funding, the Remote Community will have two years to complete the work proposed in their Application.

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Does the proposed energy solution need to be a FIT recognized technology?

The proposed energy solution does not need to be a FIT recognized technology. As long as the proposed energy solution will reduce the community's reliance on diesel, it is an eligible energy solution.

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