Grid Innovation Fund and Innovation Sandbox

2021 Joint Targeted Call Project Proposal Template Part A

Applicant: Double-click here and type the name of your organization (short form)

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# Part 1: Detailed Project Description

## 1.1. Applicant Information

Key Information

|  |  |
| --- | --- |
| **Project Title:** |  |
| **Applicant:** |  |
| **Submission Date:** |  |

Applicant’s Designated Contact

(e.g. project lead, project manager, etc.)

|  |  |
| --- | --- |
| **Name:** |  |
| **Title:** |  |
| **Mailing Address:** |  |
| **Phone:** |  |
| **Email:** |  |

Applicant’s Executive with Signing Authority

(e.g. CEO, CFO, ED, etc.)

|  |  |
| --- | --- |
| **Name:** |  |
| **Title:** |  |
| **Mailing Address:** |  |
| **Phone:** |  |
| **Email:** |  |

Accessibility Disclaimer: This is a fillable form and not all of the content in this document may be captured by a screen-reading device. If you require additional assistance to complete and submit this form, please contact [gridinnovationfund@ieso.ca](file:///C:\Users\micicm\Desktop\2021%20Enabling%20Resources%20Targeted%20Call\gridinnovationfund@ieso.ca).

**PLEASE READ THROUGH THE ENTIRE TEMPLATE PRIOR TO COMPLETING TO ENSURE THAT YOU UNDERSTAND THE QUESTIONS. Be as succinct and detailed as possible; bullet points and equations are encouraged. References, evidence, citations and step-by-step calculations are strongly encouraged to support any claims. Should you have any questions regarding the submission package, please contact the GIF team (**[**gridinnovationfund@ieso.ca**](mailto:gridinnovationfund@ieso.ca)**)**

** MAXIMUM 12,000 WORDS EXCLUDING “ATTACHED ITEMS” described in Section 6 or References**

## 1.2 Brief Project Description

|  |
| --- |
| Provide a brief description of your project. Please keep your description to a maximum of 120 words. |

Expected Project Duration: Months

## 1.3 Project Overview

Please check off all categories and markets that are applicable to your project

|  |  |  |
| --- | --- | --- |
| **Category** | **Target Market(s)** | **Project Type** |
| Demand Reduction    Demand Response  Load Shifting  Efficient electrification  Load Reduction  System Integration | Commercial  Institutional  Industrial  Agricultural  Commercial  Existing Homes  New Homes  Single/Multifamily | Strategic Opportunity  Emerging Technology  Demonstration  Program  Tool  Strategic research |

## 

## Table showing an example of a budget overview 1.4 Budget Overview

**APPLICANT TO COMPLETE\***

Complete the table below following the example provided. Please list the names of any and all third party contributors and indicate whether or not their funding is confirmed. In addition to the budget outline below, Applicants must complete the Process Flow, Budget, Work Plan, Measuring Results, Project Risk Profile and Quantifiable Outcomes Excel template provided in Project Proposal Part B. “IESO Contribution” represents your cash request to the IESO. This request should not violate the leverage rules of the specific project category as stated in the Application Guideline.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Approximate total contribution (over full project duration) | | | |
|  | Cash ($) | Cash  (% of total project)\*\*\* | In-kind ($) | In-kind  (% of total project) |
| Applicant contribution | $0 | 0% | $0 | 0% |
| Partner 1\*\* contribution | $0 | 0% | $0 | 0% |
| Partner 2 contribution | $0 | 0% | $0 | 0% |
| Partner 3 contribution | $0 | 0% | $1 | 100% |
| Subtotal (non-IESO contribution) | $ 0 | 0% | $ 1 | 100% |
| IESO Contribution | $1 | 100% | $0 | 0% |
| Total | $ 1 | 100% | $ 1 | 100% |

\* Add rows as necessary

\*\* Provide actual name

\*\*\* In the highlighted cells right click and press “update field” to update the cell with correct value

## 1.5 About the applying organization

|  |
| --- |
| Describe the mandate and composition of the applying organization. Provide:   * a brief history of the organization (1 paragraph max); * a description of the organization’s primary business activities; * a description of how the organization is funded and staffed; * a description of the role of the organization in the energy sector. |

\*Insert Text here\*

1.6 About the project partners

|  |
| --- |
| Describe each of the partners’ organizations. Provide:   * a brief history of the organization (1 paragraph max); * a description of the organization’s primary business activities; * a description of how the organization is funded and staffed; * a description of the role of the organization in the energy sector. |

\*Insert Text here\*

1.7 Project Concept and Rationale

|  |
| --- |
| In this section, fully describe the proposed project by addressing each of the points below. Please be specific, detailed, concise and structured. Claims need to be supported by citation, evidence and/or calculations with stated assumptions. Do not use embellishment or adjectives to upsell the solution. Bullet points, equations, calculations and quantitative descriptions are strongly encouraged where appropriate. Equations need to be numbered. References/citations can either be provided as an attached document or at the end of this document. |
| 1.7.A. Describe the project concept and scope (max. 1 paragraph). |

\*Insert Text here\*

|  |
| --- |
| 1.7.B. Describe the project rationale. Include an explanation of the electricity issues or barriers and how the proposed solution will address them. |

\*Insert Text here\*

|  |
| --- |
| 1.7.C. Describe similar projects/programs/tools/solutions/research/technologies that exist in the market today. |

\*Insert Text here\*

|  |
| --- |
| 1.7.D. Describe how this project is unique and innovative from similar projects referenced above in 1.7.C. |

\*Insert Text here\*

|  |
| --- |
| 1.7.E. Describe how this project enables savings and/or cost reduction for ratepayers in Ontario. |

\*Insert Text here\*

|  |
| --- |
| 1.7.F. List the technology solution(s) (e.g. dispatching solution, telemetry solution, etc. and resource type(s) (e.g. solar PV, storage etc.) that will be included this project. |

\*Insert Text here\*

|  |
| --- |
| 1.7.G. Quantitatively describe in detail how this project will achieve expected results for metrics referenced in ***Project Proposal Document Part II*** Worksheet “**6. Quantifiable Outcomes**” including any sustainable energy savings and/or cost reductions and/or increased reliability. Claims need to be supported by  citation, evidence and/or step-by-step calculations with stated assumptions on how the outcomes were derived. All equations need to be numbered. |

\*Insert Text here\*

|  |
| --- |
| 1.7.H. How will the successes, metrics and savings listed above in 1.7.G persist beyond project completion? |

\*Insert Text here\*

|  |
| --- |
| 1.7.I. Describe how the scope of this pilot project relates to conservation and/or demand management.  i.e. reduction of electricity consumption and/or reducing the draw of electricity directly or indirectly from the IESO-controlled grid, and/or promoting consumers to change their demand profile by either consuming less electricity or shifting their consumption |

\*Insert Text here\*

|  |
| --- |
| 1.7.J. Should this project not receive funding from the IESO, please describe the impact(s) this would have on the project. |

\*Insert Text here\*

|  |
| --- |
| 1.7.K. A competitive bidding process is required for any subcontracts over $50,000.00 in value. If you require external consultants, please outline the key attributes and selection criteria you will use to make a decision. If you plan to continue using any third parties that have already been competitively procured, please provide information on them, including the role that they will play in this project, their existing contracted roles with your organization, and the manner and date that they were selected as your service providers. |

\*Insert Text here\*

|  |
| --- |
| 1.7.L. Projects funded through the Grid Innovation Fund cannot have a net-positive greenhouse gas (GHG) emissions impact. Please articulate how you will ensure that the solution being proposed will not contribute to a net-positive GHG emissions impact. |

\*Insert Text here\*

1.8 Technical & Scalability Assessment

In this section, fully describe the proposed project by addressing each of the points below. Please be specific, detailed, concise and structured. Claims need to be supported by citation, evidence and/or equations with step-by-step calculations with stated assumptions. Do not use embellishment or adjectives to upsell the solution. Bullet points, equations, calculations and quantitative descriptions are strongly encouraged where appropriate. Equations need to be numbered. References/citations can either be provided as an attached document or at the end of this document.

1.8.1. Technology

|  |
| --- |
| 1.8.1.A. Describe the proposed project’s technology in detail. Clearly establish the basis for the project’s novelty and technical and functional superiority. Provide diagrams, designs, equations, etc. as necessary (within this document). |

\*Insert Text here\*

|  |
| --- |
| 1.8.1.B. Outline work completed to date confirming/validating the feasibility of the project’s technology (e.g. trials, third party validation, and expert comment). List any patents secured or applied for (include status). |

\*Insert Text here\*

|  |
| --- |
| 1.8.1.C. Describe the current state of any programs/tools/research/technologies proposed to be undertaken, the state of development this project is intended to achieve, and activities required to establish commercial readiness. Please note which activities fall under the scope of this project. |

\*Insert Text here\*

|  |
| --- |
| 1.8.1.D. Check off all functionalities below that relate to the project, specifically around dispatching and compliance, telemetry and metering and settlement. |

### 

### Dispatching and Compliance

| A dispatching tool/software/technology that is able to receive offer data from DERs/DER resource aggregations (DERA) intending to demonstrate real-time[[1]](#footnote-1) capabilities at the wholesale and distribution level. |  |
| --- | --- |
| The dispatching tools/software/technologies is able to send dispatches, at random, from both the IESO and from the distribution system in accordance with IESO market rules: (5-min energy, 10/30- min operating reserve and regulation). |  |
| The DER/DERA responds to dispatch in real-time to demonstrate the ability to meet both wholesale and distribution system needs independently and/or simultaneously[[2]](#footnote-2) |  |
| A non-resource owner/aggregator (such as the platform partner or third party) is able to verify compliance/non-compliance |  |
| The project includes reporting on compliance with supporting evidentiary data |  |

### Telemetry

| The project demonstrates (via simulation/research etc.) how the IESO can receive aggregated telemetry from DERAs in accordance with market rules from a data granularity, data quality, privacy and cybersecurity for real-time visibility and forecasting. The project also demonstrates how data can be collected and used more efficiently by distributor(s). | ☐ |
| --- | --- |
| The project demonstrates what telemetry services will benefit the distribution system. | ☐ |

### Metering and Settlement

| The project includes a research component on metering and settlement for DERAs at the wholesale and distribution levels | ☐ |
| --- | --- |
| The research focuses on identifying all viable metering options that are compliant with market rules, standards and policies and that can be integrated with IESO metering business processes and systems | ☐ |
| The research includes potential alternatives (or amendments needed) to the above mentioned rules/standards/policies and the benefits/drawbacks of each, including the costs to implement. | ☐ |
| The research describes how other jurisdictions are dealing with real-time metering and settlement for DERAs | ☐ |

### DER Operationalization (Optional)

The IESO and OEB recognize that there may be additional operational barriers not discussed above that can prevent DERs/DERAs from participating in wholesale markets and distribution systems. ‘Please complete this optional section if your project addresses a barrier not identified above.

| The project clearly identifies an operational barrier (not discussed above) and proposes a demonstration/ research/simulation on how the barrier can be overcome |  |
| --- | --- |
| The projects/programs/tools/solutions/research/technologies benefits the wholesale and distribution system |  |

|  |
| --- |
| 1.8.1.E. What makes your proposed programs/tools/solutions/research/technologies unique from and superior to those of your competitors and current baseline technologies? How exactly does the performance of your programs/tools/solutions/research/technologies compare against these solutions? Using the table below, demonstrate your understanding of the performance of these other programs/tools/solutions/research/technologies , and specify your performance goals. |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Competitor Name** | **Measure (Technology)** | **Performance Factor 1 (specify)** | **Performance Factor 2 (specify)** | **Performance Factor 3 (specify)** |
|  | Your technology (specify) | e.g. Annual Electricity Savings (kWh) | e.g. Cost of generation ($/kWh) | e.g. Incremental Cost ($) |
|  | Baseline technology (specify) |  |  |  |
|  | Competing technology 1 (specify) |  |  |  |
|  | Competing technology 2 (specify) |  |  |  |
|  | Add additional lines as necessary |  |  |  |

Specify the performance factors most relevant to your technology and critical to competitive advantage in your market place.

Please list references for all figures used:

1.

2.

|  |
| --- |
| 1.8.1.F. Please describe how cyber security has been factored into your project and any standards/controls/tools that will be implemented to mitigate cyber security risk. |

\*Insert Text here\*

1.8.2. Market

|  |
| --- |
| In this section, please describe the market that could utilize/implement the solution being proposed in this application. |
| 1.8.2.A. Describe the target market. Please include references. |

\*Insert Text here\*

|  |
| --- |
| 1.8.2.B. What is the potential size, structure and trends of your target market?  Please include references. |

\*Insert Text here\*

|  |
| --- |
| 1.8.2.C. List current and potential customers in Ontario and please include level of interest and timeline for potential adoption by customers.  Please include references. |

\*Insert Text here\*

|  |
| --- |
| 1.8.2.D. What are the non-regulatory and non-policy barriers to entry in your target market? How is this project designed to address those? |

\*Insert Text here\*

|  |
| --- |
| 1.8.2.E. Outline the commercialization plan for the product, such as scaling up production and growing the company. Please include targets/thresholds that the projects needs to reach in order to commercialize/scale. |

\*Insert Text here\*

|  |
| --- |
| 1.8.2.F. Who specifically are your competitors and what is their market share?  Please include references. |

\*Insert Text here\*

|  |
| --- |
| 1.8.2.G. Describe your sales and distribution strategy to obtain the potential identified customers. |

\*Insert Text here\*

1.8.3. Business Model

|  |
| --- |
| 1.8.3.A. Has there been an agreement reached to work together with key suppliers/partners after the pilot? **(I.e. an MOU/agreement level) If there are alternatives to these key partners/activities for the future, please describe them.** |

\*Insert Text here\*

|  |
| --- |
| 1.8.3.B. Please state whether the programs/tools/technologies are likely to be financially feasible for scaling following project completion. (I.e. Are there customers that are ready to purchase the product? What is the estimated payback period and underlying assumptions?) Claims need to be supported by citation, evidence and/or step-by-step calculations with stated assumptions on how the outcomes were derived. All equations need to be numbered. |

\*Insert Text here\*

|  |
| --- |
| 1.8.3.C. If the programs/tools/technologies are currently not financially feasible, please explain what will enable them to become commercially viable (e.g. lower technology cost). Please indicate if/how this project will address this.  Claims need to be supported by citation, evidence and/or step-by-step calculations with stated assumptions on how the outcomes were derived. All equations need to be numbered. |

\*Insert Text here\*

|  |
| --- |
| 1.8.3.D. Please list any assumed grants/incentives for financial feasibility. If these grants/incentives were no longer available, would the project still be financially feasible? |

\*Insert Text here\*

1.8.4. Regulatory Consideration(s)

|  |
| --- |
| In this section, fully describe the OEB Innovation Sandbox support and/or temporary relief from a regulatory requirement that will be needed in order for the project to proceed.  Please refer to Section 3 of the Application Guideline for information about OEB Innovation Sandbox support. |
| 1.8.4.A. Please indicate any innovative arrangements included as part of the project that test new activities, services or business models that are not present in Ontario or contemplated by the current regulatory framework. |

\*Insert Text here\*

|  |
| --- |
| 1.8.4.B. Please list all regulatory requirements within the OEB’s jurisdiction that may prevent or impede the innovative arrangements being proposed, and describe how these regulatory requirements present barriers to the project moving forward |

\*Insert Text here\*

|  |
| --- |
| 1.8.4.C. Please describe the OEB Innovation Sandbox support being sought in relation to any regulatory barriers to implementation. |

\*Insert Text here\*

|  |
| --- |
| 1.8.4.D. If applicable, please describe the approach other markets/jurisdictions have taken to remove relevant regulatory/policy barriers. |

\*Insert Text here\*

|  |
| --- |
| 1.8.4.E. If seeking OEB Innovation Sandbox support, please describe the potential for the project to provide clear benefits to consumers and the safeguards that will be in place to provide a reasonable degree of consumer protection during the trial. |

\*Insert Text here\*

|  |
| --- |
| 1.8.4.F. If seeking OEB Innovation Sandbox support, please describe within what timeline Sandbox support and (where applicable) a decision on any related exemption application is required in order for the project to proceed. |

\*Insert Text here\*



# Part 2: Evaluation Criteria

The details of the evaluation criteria are provided below for your reference. Further details can be found in the Application Guideline found [here](https://www.ieso.ca/en/Get-Involved/Funding-Programs/Grid-Innovation-Fund/Targeted-Call-for-Proposals). Applicants with highly ranked applications will be provided with the opportunity to work with the Review Committee to refine their applications to address any questions and/or feedback. Once questions and/or clarifications have been addressed via an updated application, the Review Committee will bring high ranking applications forward for executive approval in Q1 2022.

|  |  |  |
| --- | --- | --- |
| **Category** | **Evaluation Criteria** | **Weighting** |
| Potential Impact | Significance of ratepayer cost reduction potential | 10 points |
| Market Capability Building Impact | The project builds the skills and knowledge required by the market to accelerate the adoption of cost-effective DER solutions to meet the needs of customers and the electricity system | 5 points |
| Market, program or technical advance | The project is testing a novel approach and advances the “state of the art” in Ontario | 10 points |
| Project Team & Partners | The project team has the qualifications and experience required to execute a large-scale, strategic project. The project team provides evidence of appropriate partnerships, including a utility partner where appropriate. A minimum of three (3) partners (including lead applicant) have been listed and Letters of Support have been provided. Projects with a greater number of highly qualified, experienced and committed partners will be given greater points (due to the capacity building aspects that such projects offer). | 15 points |
| Project funding | The project has secured funding additional to the funding requested from the IESO that is required to complete the project. The overall funding proposal satisfies IESO funding requirements (minimum 25% cash contributions from lead applicant and partners towards the total project value) and appropriately allocates risk between the proponent, partners and the IESO. The lead applicant is making a cash contribution toward the project. The financial ask of the IESO is a minimum of $1 million. The IESO’s funding will not account for any more than 50% of total project costs. | 10 points |
| Project purpose and outcomes | The project outcomes are aligned with the high-level objectives of this joint call and have the potential to influence regulatory evolution and wholesale market participation. The project timeline allows for outcomes to be made available so that the IESO and OEB may use the results for future planning initiatives. | 5 points |
| Project design | The project’s design is reasonable and likely to meet the stated objectives. The project satisfies the criteria of section 2 in the Application Guideline. The scope, work plan and scheduled tasks are contained in a clear and logical framework that supports successful completion of the project (for example, any DER assets or other resources included in the project scope have already been commissioned or will be commissioned in the near future). | 15 points |
| Wholesale Market and Distribution Participation | The project demonstrates the prospect for mutual benefit to both the wholesale market and distribution systems and coordination between these systems. Projects that can test solutions under multiple project categories in Section 2.2 of the Application Guideline will be awarded greater points. | 15 points |
| Regulatory Innovation | The project includes innovative arrangements that test new activities, services or business models for project proponents that are not currently present in the current regulatory environment or contemplated in the current regulatory framework. The application identifies regulatory requirements that may prevent or impede the innovative arrangements, activities or business models being proposed. Where regulatory barriers are identified, the application identifies the Sandbox support required to address regulatory barriers to implementation. | 15 points |

# Part 3: Project Team & Partners

In this section, please outline the composition of the project team and list any project partners. Note the role that each person and organization participating in the project will play. Include the applicant organization in this table. If a third party is not yet part of the team, please identify the accountability they will be responsible for and enter TBD for the name and organization. Letters confirming the role and responsibilities of any and all partners must be included with the application. Please attach CVs for project team members as an appendix.

## 3.1 Project Team

|  |  |  |
| --- | --- | --- |
| **Project team member** | **Organization and job title** | **Major accountability** |
|  |  | e.g. Project lead |
|  |  | e.g. Evaluation, Measurement and Verification |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## 3.2 Project Partners

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Organization** | **Project Role**  (e.g. participant, funder) | **Contribution Amount** | **Contribution** **Type**  (Cash / in-kind) | **If in-kind Contribution, please specify in what form** (e.g. Domain Expertise Consulting, Equipment) | **Status**  (Confirmed/Unconfirmed)  \*Please note that if you are invited to submit a proposal your partner must confirm their contribution in writing to the IESO. |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

\*Note: Add rows as necessary

## 3.3 Project Proposal Part B

|  |
| --- |
| Using the space provided in this section, fully describe how the work for this project will be undertaken and what the outcomes of the work will be.. |
| A. In one sentence, state the ultimate objective and the outcome of this project. |

\*Insert Text here\*

|  |
| --- |
| B. Use the templates provided in the Project Proposal Part B Excel File to provide additional details about your project’s detailed budget, workplan, risk assessment, measuring results, quantifiable outcomes and process flow to achieve the project outcomes from successful completion of project objectives. Examples for each of these worksheets is provided in the document for your reference. |

**Process Flow**: the process flow should demonstrate how your project will achieve its objectives. Your Process Flow should explain how the project’s activities and deliverables lead to the desired immediate, intermediate, long term, and ultimate outcomes. The process flow should provide a complete picture of the project, and should reflect the more detailed description that is provided through the milestone schedule, the budget and work plan. The process flow should be attached to the proposal in a separate document appended to this proposal, and can be made using a variety of software tools. The completion of the Process Flow will assist you in designing the short- and long-term outputs and outcomes of your project.

**Budget**: The detailed project budget should provide information about all activities undertaken as part of the project and reflect the in-kind and cash contributions of the applicant and any and all project partners. Please refer to the Application Guideline posted on the Grid Innovation Fund website for information about eligible and ineligible expenses.

**Work Plan:** Please fill out the Work Plan tab according to the instructions in the file. The items that you include in this document must match the deliverables and major task areas described in the milestone section 3.3.

**Measuring Results:** Measuring Results captures the performance indicators of each activity/deliverable, its associated target results and the timeframe of the results. This complements Section 4A of the written proposal.

**Project Risk Profile**: The risk profile should include as many risks as you think may possibly impact the project scope, budget or timeline.

**Quantifiable Outcomes**: Please complete the Quantifiable Outcomes according to the instructions in the file. Please note that for each outcome, you will need to include which section of the proposal is the outcome described and substantiated.

## 3.4 Project Plan

Using the milestone table provided below, provide a milestone schedule listing the deliverables and major activities in each task area. Describe each of the major task areas for this project (e.g. program design, development of training, measurement and verification, research, communications, knowledge transfer, etc.). Describe each of the major deliverables that will be provided to the IESO as part of this project. Please indicate which 3rd parties will also receive these deliverables, where applicable.

Milestones typically occur 3-6 times throughout the course of the project. For approved projects, milestone deliverables are submitted with a milestone report to the Grid Innovation Fund and form the basis for the release of funding. Consequently, please provide full, detailed description of deliverables. Milestone payments will not be made until all deliverables for that milestone have been satisfactorily completed.

The milestone schedule should be aligned with the completed worksheets as part of the Project Proposal Part B Milestone payments are based on the project costs incurred as described in the budget for that milestone.

**For each deliverable listed for each milestone, please include activities, method of measurement and target results. An example is provided as part of the first milestone in section 3.5 below. If you have checked off any functionalities identified in section 1.8.1.D of this proposal, please include details on how you will demonstrate the results as a deliverable in the appropriate milestone(s).**

**For any OEB Innovation Sandbox guidance/regulatory relief that has been requested by the applicant as outlined in section 1.8.4, please clearly identify in which milestone the OEB Innovation Sandbox guidance/relief will need to be in place for the project to be successful.**

3.4.B If applicable, please provide a list of demonstration sites / project participants of the pilot project and indicate if the sites/participants have been confirmed. If the sites/participants are not confirmed, please provide an approximate timeline of when it will be confirmed and what factors are dependent on the sites/participants confirmation.

3.4.A. If applicable, please provide a list of hardware/equipment that will be purchased and installed as part of this pilot project.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Equipment** | **Equipment Specification** | **Purchased**  (Yes/No) | **Installed**  (Yes/No) | **Installation Location**  **\*DO NOT PROVIDE RESIDENTIAL ADDRESSES\*** | **Approximate Installation Date** |
| e.g. Energy Storage System | e.g. 100kW, 400kWh, Li- ion | e.g. Yes | e.g. Yes | e.g. 123 ABC St. Toronto, CA | e.g. N/A |
| e.g. Grid Tied PV Inverter | e.g. 100kW | e.g. Yes | e.g. No | e.g. 456 ABC St. Toronto, CA | e.g. Jan 2023 |
| e.g. PV Panel | e.g. 50kW | e.g. No | e.g. No | e.g. 789 ABC St. Toronto, CA | e.g. Jan 2022 |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Site** | **Location**  **\*DO NOT PROVIDE RESIDENTIAL ADDRESSES\*** | **Status**  (Confirmed / Not Confirmed) | **Approximate Confirmation** | **Factors impacting confirmation** |
| e.g. 1 | e.g. 123 ABC St. Toronto, CA | e.g. Confirmed | e.g. N/A | e.g. N/A |
| e.g. 2 | e.g. 456 ABC St. Toronto, CA | e.g. Not-Confirmed | e.g. Jan 2023 | e.g. Site to be fully built Dec 2022 |
| e.g. 3 | e.g. 789 ABC St. Toronto, CA | e.g. Not-Confirmed | e.g. Jan 2022 | e.g. Site to be occupied Dec 2021 |

\*Note: Add rows as necessary

|  |  |  |  |
| --- | --- | --- | --- |
| **Participant** | **Status**  (Confirmed / Not Confirmed) | **Approximate Confirmation** | **Factors impacting confirmation** |
| e.g. 1 | e.g. Confirmed | e.g. N/A | e.g. N/A |
| e.g. 2 | e.g. Not-Confirmed | e.g. Jan 2021 | e.g. Contract not yet fully executed and awaiting counter signature from participant |

\*Note: Add rows as necessary

3.5 Milestone Description

|  |  |
| --- | --- |
| Milestone 1: **[Title]** | Submission Date: **[XX] months from project start date** |
| IESO Contribution Amount:  \*Final project milestone value must represent a minimum of  10% of Fund grant\* | $**XX** |
| Total Milestone Value: | $**XX** |

Detailed activities in each major task area that will be completed:

Please reference “Unique Line Item ID” for each activity as cited in the worksheet titled “2. Budget” as part of Project Proposal Part B document

Brief description of how this milestone advances the project:

\*EXAMPLE: Installation of meters and collection of data including the drafting of an M&V Plan\*

\* Example

1. Develop M&V Plan
   1. Develop detailed M&V Plan
   2. Review detailed M&V Plan with IESO
2. Meter Installation
   1. Develop metering plan
   2. Acquire submeters
   3. Meter installation
3. Establish Baseline
   1. Data collection
   2. Data analysis and weather normalization
4. Reporting
   1. Draft report on baseline establishment

Quantifiable Objectives Advancing This Milestone

Please include any quantifiable objectives as described in project activities here i.e. survey responses, energy targets, procurement activities, widget installation etc

|  |  |  |  |
| --- | --- | --- | --- |
| Activity | Method of Measurement | Target Result | Unit |
| \* Example Procure Submeters | \* Example Number of submeters delivered | \* Example 50 | submeters |
| \* Example Install Submeters | \* Example Number of installations | \* Example 50 | submeters |
| \* Example Collect Data | \* Example Data logger with minute frequency | \* Example 6 | months |

Identified Risks and Risk Mitigation Strategy

As referenced in Worksheet titled “5. Project Risk Profile”

|  |  |  |
| --- | --- | --- |
| Risk ID | Identified Risk | Risk Mitigation Strategy |
| 1 | \* Example Delays in submeter delivery | \* Example Factor in the expected lead time and add a buffer to compensate uncertainties in equipment delivery. |
| 2 | \* Example Submeter  Equipment Failure post installation | \* Example Complete QA testing prior to equipment installation. |

\* Example

Deliverables to IESO and OEB:

1. M&V Plan for approval
2. Report for analysis of data including the following sections:
   1. Executive Summary
   2. Introduction
   3. Methodology
   4. Data Description and Analysis
   5. Recommendation and Conclusion
   6. Supporting data used for analysis in CSV format as a separate attachment

Detailed activities in each major task area that will be completed:

Please reference “Unique Line Item ID” for each activity as cited in the worksheet titled “2. Budget” as part of Project Proposal Part B document

Brief description of how this milestone advances the project:

\*Insert Text here\*

|  |  |
| --- | --- |
| Milestone 2: **[Title]** | Submission Date: **[XX] months from project start date** |
| IESO Contribution Amount:  \*Final project milestone value must represent a minimum of  10% of Fund grant\* | $**XX** |
| Total Milestone Value: | $**XX** |

\*Insert Text here\*

Quantifiable Objectives Advancing This Milestone

Please include any quantifiable objectives as described in project activities here i.e. survey responses, energy targets, procurement activities, widget installation etc

|  |  |  |  |
| --- | --- | --- | --- |
| Activity | Method of Measurement | Target Result | Unit |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Identified Risks and Risk Mitigation Strategy

As referenced in Worksheet titled “5. Project Risk Profile”

|  |  |  |
| --- | --- | --- |
| Risk ID | Identified Risk | Risk Mitigation Strategy |
|  |  |  |
|  |  |  |
|  |  |  |

\*Insert Text here\*

Deliverables to IESO and OEB:

Brief description of how this milestone advances the project:

\*Insert Text here\*

Detailed activities in each major task area that will be completed:

Please reference “Unique Line Item ID” for each activity as cited in the worksheet titled “2. Budget” as part of Project Proposal Part B document

|  |  |
| --- | --- |
| Milestone 3: **[Title]** | Submission Date: **[XX] months from project start date** |
| IESO Contribution Amount:  \*Final project milestone value must represent a minimum of  10% of Fund grant\* | $**XX** |
| Total Milestone Value: | $**XX** |

\*Insert Text here\*

Quantifiable Objectives Advancing This Milestone

Please include any quantifiable objectives as described in project activities here i.e. survey responses, energy targets, procurement activities, widget installation etc

|  |  |  |  |
| --- | --- | --- | --- |
| Activity | Method of Measurement | Target Result | Unit |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Identified Risks and Risk Mitigation Strategy

As referenced in Worksheet titled “5. Project Risk Profile”

|  |  |  |
| --- | --- | --- |
| Risk ID | Identified Risk | Risk Mitigation Strategy |
|  |  |  |
|  |  |  |
|  |  |  |

\*Insert Text here\*

Deliverables to IESO and OEB:

|  |  |
| --- | --- |
| Milestone 4: **[Title]** | Submission Date: **[XX] months from project start date** |
| IESO Contribution Amount:  \*Final project milestone value must represent a minimum of  10% of Fund grant\* | $**XX** |
| Total Milestone Value: | $**XX** |

\*Insert Text here\*

Detailed activities in each major task area that will be completed:

Please reference “Unique Line Item ID” for each activity as cited in the worksheet titled “2. Budget” as part of Project Proposal Part B document

Brief description of how this milestone advances the project:

\*Insert Text here\*

Quantifiable Objectives Advancing This Milestone

Please include any quantifiable objectives as described in project activities here i.e. survey responses, energy targets, procurement activities, widget installation etc

|  |  |  |  |
| --- | --- | --- | --- |
| Activity | Method of Measurement | Target Result | Unit |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Identified Risks and Risk Mitigation Strategy

As referenced in Worksheet titled “5. Project Risk Profile”

|  |  |  |
| --- | --- | --- |
| Risk ID | Identified Risk | Risk Mitigation Strategy |
|  |  |  |
|  |  |  |
|  |  |  |

\*Insert Text here\*

Deliverables to IESO and OEB:

|  |  |
| --- | --- |
| Milestone 5: **[Title]** | Submission Date: **[XX] months from project start date** |
| IESO Contribution Amount:  \*Final project milestone value must represent a minimum of  10% of Fund grant\* | $**XX** |
| Total Milestone Value: | $**XX** |

\*Insert Text here\*

Detailed activities in each major task area that will be completed:

Please reference “Unique Line Item ID” for each activity as cited in the worksheet titled “2. Budget” as part of Project Proposal Part B document

Brief description of how this milestone advances the project:

\*Insert Text here\*

Quantifiable Objectives Advancing This Milestone

Please include any quantifiable objectives as described in project activities here i.e. survey responses, energy targets, procurement activities, widget installation etc

|  |  |  |  |
| --- | --- | --- | --- |
| Activity | Method of Measurement | Target Result | Unit |
|  |  |  |  |
|  |  |  |  |

Identified Risks and Risk Mitigation Strategy

As referenced in Worksheet titled “5. Project Risk Profile”

|  |  |  |
| --- | --- | --- |
| Risk ID | Identified Risk | Risk Mitigation Strategy |
|  |  |  |
|  |  |  |
|  |  |  |

\*Insert Text here\*

Deliverables to IESO and OEB:

\*\*\*Add/Delete Milestones Tables as required

# Part 4: Measuring Results: Evaluation Measurement

|  |
| --- |
| 4.A. Use the information provided in Section 3.3 and 3.4 to develop a detailed account of how the progress and impacts of this project will be accurately assessed. Fill in this information in the “4. Measuring Results” Worksheet in Project Proposal Part B. |

**Note:** Measuring results requires a performance indicator to be established for each project outcome and deliverable as well as a plan for how it will be measured. This enables the IESO to monitor not only the progress of the project, but its effectiveness at achieving its objectives. The process flow and the project plan are useful guides in completing this table.

Measurement and evaluation of the activities described in your measuring results worksheet should be accounted for in the project budget. Proper measurement and evaluation is a very important element for Grid Innovation Fund projects, and therefore sufficient resources should be allocated for this purpose.

For measurement of energy savings, you should follow the [IPMVP](https://evo-world.org/en/products-services-mainmenu-en/protocols/ipmvp) (International Performance Measurement and Verification Protocol) that the IESO uses as its standard.

|  |
| --- |
| 4.B. Economic Development |
| In this section please describe the development of the labour force that will occur as a result of:   1. Creation of new jobs through this project\*; 2. Number of jobs that this project will support excluding new job creation. 3. Learning of new skills by workers in existing positions; 4. Potential additional and/or indirect employment opportunities that may be created by you and your partner organizations   \*Note: For A) and B) please provide an estimate of the duration of the employment that will be created (e.g.: 2 weeks, 6 months, 5 years, etc.) |

\*Insert Text here\*

# Part 5: References

In this section, please provide three references that the IESO may contact to discuss your project. Examples of references could include: co-funders, or other parties who can attest to the strength of the project proposal and the project team. 3rd party project participants should not be listed as references.

Reference 2

Reference 3

Reference 1

|  |  |
| --- | --- |
| **Name:** |  |
| **Job Title:** |  |
| **Organization:** |  |
| **Relationship:** |  |
| **Email:** |  |
| **Phone:** |  |

|  |  |
| --- | --- |
| **Name:** |  |
| **Job Title:** |  |
| **Organization:** |  |
| **Relationship:** |  |
| **Email:** |  |
| **Phone:** |  |

|  |  |
| --- | --- |
| **Name:** |  |
| **Job Title:** |  |
| **Organization:** |  |
| **Relationship:** |  |
| **Email:** |  |
| **Phone:** |  |

\*Insert more if necessary

# Part 6: Application Instructions

|  |
| --- |
| Use this list to verify that the requested items have been completed and included in your electronic package.  Please use the following labeling convention for your electronic submissions: Please scan statements and materials that require signatures, as electronic versions of all materials are preferred. Additional materials will not be considered in your review unless specifically requested by IESO. |
| **Submission check list:**   1. Cover letter from applicant (signed by applicant executive with signing authority) 2. Completed Proposal Part A template (this file) 3. Completed Proposal Part B, which includes: Proposal Part B Cover, 1. Process Flow, 2. Budget, 3. Work Plan, 4. Measuring Results, 5. Project Risk Profile and 6. Quantifiable Outcomes 4. CVs of Project Team (max. 2 pages each) 5. Most recent audited financial statements of applying organization 6. Copy of the lead organization’s certificate of incorporation 7. Signed final page of proposal Part A 8. Signed Letters of Support from all project partners to specify all cash and/or in-kind/ site demonstration commitments to the project. 9. Project Brief   **Please acknowledge that the applicant has reviewed and understands the terms and conditions contained in the template Grid Innovation Fund Agreement posted** [**here**](https://ieso.ca/en/Get-Involved/Funding-Programs/Grid-Innovation-Fund/Targeted-Call-for-Proposals)**. The IESO will not be able to accommodate applicants’ requests for changes to the terms and conditions. Successful project proponents will have one (1) week to review, sign and send the agreement back to the IESO for countersignature.**  Submit these files by the specified deadline to: [gridinnovationfund@ieso.ca](mailto:gridinnovationfund@ieso.ca) |
| **List** **of Additional Documents attached to this proposal**  Please list any other documents included in this proposal including Letters of Support from sites for proposals that involve piloting at specific sites |
| |  |  | | --- | --- | | Attachment 1 |  | | Title of Document: |  | | Description of Document: |  | |  | Attachment 2 | | Title of Document: |  | | Description of Document: | Attachment 3 | |  |  | | Title of Document: |  | | Description of Document: |  | |

\*Insert more if necessary

**\*\*PRINT, SIGN AND SCAN THIS PAGE (SIGNATURE REQUIRED) \*\***

# Part 7: Declaration

|  |  |  |
| --- | --- | --- |
| I attest to the accuracy of the content of this proposal and the attached financial statements. | | |
| Signature:  Name:  Date: | | |
| **Disclaimer**  Receipt of an application to the Grid Innovation Fund does not constitute a commitment by the IESO to support the application, nor does it create a business relationship between the applicant, its partners and the IESO. Executive approval is required for the Grid Innovation Fund to provide any financial support to any project, and the IESO will not provide financial support for the work of applicants performed prior to executive approval of that project. The decision of the executive team is final and takes precedent over prior communications. Financial support from the IESO to an applicant to the Grid Innovation Fund will only be provided upon execution of the contribution agreement between the applicant and the IESO, and only according to the terms and conditions therein. The IESO and the OEB reserve the right to make public the names of applicants, the title and a description of their proposed project, the amount of funds applied for. All other information submitted by the applicant in their proposal application will be treated as confidential. |

**Independent Electricity**

**System Operator**

1600-120 Adelaide Street West

Toronto, Ontario, M5H 1T1

Phone: 905.403.6900

Toll-free: 1.888.448.7777

E-mail: [customer.relations@ieso.ca](mailto:customer.relations@ieso.ca)

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LinkedIn symbol [linkedin.com/company/IESO](https://www.linkedin.com/company/ieso/)

**Ontario Energy Board**

2300 Yonge St.

Toronto, Ontario, M4P 1E4

Toll-free: 1.877.632.2727

E-mail : [publicinformation@oeb.ca](mailto:publicinformation@oeb.ca)

industryrelations@oeb.ca

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Twitter symbol @[OntEnergyBoard](https://twitter.com/OntEnergyBoard?ref_src=twsrc%5Egoogle%7Ctwcamp%5Eserp%7Ctwgr%5Eauthor)

LinkedIn symbol [linkedin.com/company/ontario-energy-board](https://ca.linkedin.com/company/ontario-energy-board)

1. “Real-time capabilities” means demonstrating actual, measureable, output changes in response to a dispatch instruction in accordance with market rules. Measuring compliance should not be done by the resource owner/aggregator. [↑](#footnote-ref-1)
2. The IESO and the OEB are happy to work with proponents on what a potential “Call Order” can look like. [↑](#footnote-ref-2)