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# Indigenous Energy Support Program (IESP)

Program Guidelines  
Version 1.0  
April 2024

IESP resources are available at:

[IESO website – IESP](#)

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## 1. Background

The Independent Electricity System Operator (“IESO”) (as successor to the Ontario Power Authority) has designed, administered and managed a portfolio of Energy Support Programs (“ESPs”) since 2009 in accordance with directions from the Minister of Energy. For additional information on the history of the ESPs and predecessor support programs, please visit the [IESO website](#).

From time to time, the IESO makes updates to the ESPs, informed by feedback from Indigenous communities and program recipients. In 2022, the IESO conducted a survey and engaged with Indigenous communities, organizations and program recipients to seek input on the proposed redesign of the ESPs under a single Indigenous Energy Support Program (“IESP” or “the Program”) structure. The IESP seeks to increase funding accessibility, transparency and clarity of IESO’s expectations and targets, while demonstrating the IESO’s commitment to continued support of Indigenous participation and engagement in the electricity sector.

## 2. Program Objectives and Overview of Areas of Funding

The objective of the IESP is to promote broad equitable participation in Ontario’s electricity sector by First Nation and Métis Communities and First Nation and Métis Organizations by supporting community capacity building, including energy planning and access to project partnerships and development, as well as the building of energy knowledge, awareness and skills related to energy projects.

Unless otherwise defined, capitalized terms used in the Program Guidelines have the meanings set out in section 6.

The Program will have a total budget of \$15 million per calendar year (the “IESP Budget”). Applications will be subject to the IESP Budget in effect as of the date the application is submitted to the IESO.

The Program provides support through one or more of the following three Areas of Funding (“AOF”):

### 2.1 Capacity Building

The Capacity Building AOF provides funding to support First Nation and Métis Communities and First Nation and Métis Organizations in planning, evaluating and implementing energy-related priorities and to support awareness, education, skills, and capacity building initiatives to help prepare them to fully leverage energy opportunities and contribute to cleaner, more reliable, and more affordable energy systems. Initiatives funded through this AOF include:

- hiring a designated Community Energy Champion (CEC) within their community or organization;
- expenses such as equipment, training, engagement, or travel related to the work of the CEC;
- community energy engagement;

- energy skills building, project training and certifications;
- innovative knowledge and data sharing models.

## **2.2 Economic Development**

The Economic Development AOF provides funding to support equitable access to project partnerships and development leading to clean, reliable and affordable supply-side solutions for First Nation and Métis Communities, and First Nation and Métis Organizations. Initiatives funded through this AOF include:

- the assessment and development of renewable energy projects;
- the assessment and development of partnerships for renewable energy projects and transmission projects;and
- innovative supply-side solutions to challenges that support the IESO’s focus on reliability and cost-effectiveness, as demonstrated through emerging technologies, new business models, new practices, regulatory or policy constructs, and existing solutions that are used in novel ways.

## **2.3 Energy Resiliency & Monitoring**

The Energy Resiliency & Monitoring AOF provides funding to support First Nation and Métis Communities and First Nation and Métis Organizations with community-led development of a new community energy plan designed to enhance community energy security, and updates to it. Initiatives funded through the Energy Resiliency & Monitoring AOF include:

- development of a new community energy plan; and
- updates to an existing community energy plan.

Ideally, a community energy plan will help identify challenges and opportunities to increase community and organizational energy security. In practice, the community energy plan can include any number of elements, but at a minimum, it must contain the six components described in Appendix A, which is incorporated by reference into the IESP Guidelines.

# **3. Participation in the Indigenous Energy Support Program**

## **3.1 Maximum Funding Amount**

Under the IESP, an Applicant may be eligible to apply for funding under one or more AOF, subject to the maximum AOF and Project Type values specified in Table 1, and provided that the aggregate maximum approved funding for an Applicant per calendar year does not exceed \$730,000. The maximum funding amount is subject to the aggregate funding limit for each AOF and any other requirements set out in these Program Guidelines.

## 3.2 Eligible Applicants

- First Nation or Métis Communities;
- First Nation or Métis Organizations (including Friendship Centres, Indigenous housing providers, and others); and
- In the case of the Capacity Building (Part B) AOF, non-Indigenous entities working in partnership with, and for the benefit of, First Nation or Métis Communities, or First Nation or Métis Organizations are also eligible applicants (Note: Non-Indigenous entities may only apply as joint applicants working with a First Nation or Métis Community or First Nation or Métis Organization as the lead applicant);

OR

- In the case of the Remote Projects Development Project Type under the Economic Development AOF, only those Identified Remote First Nations Communities that did not previously access such funding under the predecessor Energy Partnerships Program offered by the IESO as a part of the ESPs.

Funding is not provided to individuals. Joint applications for a shared single Project may be submitted by two or more eligible applicants. Applicant eligibility for the IESP is determined in the sole and absolute discretion of the IESO or the Ministry of Energy, as applicable.

## 3.3 Eligible Project Types and Funding Amounts under Areas of Funding

### 3.3.1 General:

Funding is provided under the IESP for eligible expenses that are directly related and reasonably necessary to complete the Project or for the employment of a CEC, as the case may be. Please note that in-kind contributions (if any) are not reimbursable under the IESP.

All applications to the IESP must fit within one or more of the AOF described in Table 1.

Subject to any other requirements outlined in these Program Guidelines, where the applicant is applying to the IESP for more than one Project, the applicant must submit a separate application in respect of each Project.

### 3.3.2 Capacity Building (Part A) AOF:

Applicants may be eligible for funding up to a maximum of \$195,000 per application, inclusive of any Additional Qualification Top Up.

Applicants may not apply for funding under another AOF within the same application if applying for funding under the Capacity Building (Part A) AOF. For the avoidance of doubt, applicants seeking to access funding under the Capacity Building (Part A) AOF must submit a separate application for such funding.

While all applicants are encouraged to have identified a CEC candidate at the application stage, in order to be eligible for funding under the Capacity Building (Part A) AOF:

- Applicants that have applied for the Additional Qualification Top Up are required to have (i) identified a CEC candidate at the application stage and (ii) hired a CEC prior to the execution of a Funding Agreement; and
- Applicants that have not applied for the Additional Qualification Top Up are required to have hired a CEC prior to the execution of a Funding Agreement.

Additionally, applicants that apply for the Additional Qualification Top Up must complete and submit the Additional Qualification Information form, which is Appendix C to the IESP application form.

### **3.3.3 Capacity Building (Part B) AOF:**

Applicants may submit multiple Project applications under the Capacity Building (Part B) AOF and may be eligible for funding up to a maximum of \$150,000 per application.

The applicable Threshold Amount for a duly qualified single external resource is 40% of the maximum funding amount that is specified in the Funding Agreement for the Capacity Building (Part B) AOF.

### **3.3.4 Economic Development AOF:**

With the exception of the Remote Projects Development Project Type, applicants may submit multiple Project applications under this AOF and may be eligible for funding up to a maximum of \$250,000 per calendar year regardless of the number of applications submitted.

Applicants that are Identified Remote First Nations Communities may be eligible for funding under the Remote Projects Development Project Type up to a maximum of \$500,000 towards eligible expenses associated with the development of renewable energy based solutions to help reduce diesel dependence in their respective communities.

With the exception of the Remote Projects Development Project Type, the maximum amount of funding provided for a Project under this AOF is the lesser of 80% of the total Project costs and the maximum funding amounts per Project Type set out in Table 1. For example, if you are applying for funding for a Feasibility Study (subject to a maximum of \$50,000 in funding) and your total Project cost is \$60,000, you would be eligible for up to \$48,000 of funding as this is the lesser of 80% of the Project costs and the maximum funding amount for a Feasibility Study. However, if the Project costs were \$65,000, then you would be eligible for up to \$50,000 of funding, which is the lesser of 80% of the Project costs (i.e. \$52,000) and the maximum funding amount for a Feasibility Study.

Applicants seeking to access funding for a Feasibility Study under this AOF may not apply for funding for Project Development or Innovation within the same application if the Project Development or Innovation funding request relates to the same Project as, and is contingent on the results of, that Feasibility Study. Funding for the related Project Development or Innovation activities may be requested in a subsequent IESP application, following completion of the Feasibility Study.

Applicants seeking to access funding related to transmission facilities may only apply for Partnerships funding under this AOF.

Applicants seeking to access funding for Project Development are encouraged, but not required, to have an existing community energy plan prior to applying for funding under this AOF, in order to link the Project with long-term community energy visioning. Applicants seeking funding for Project Development, Feasibility Study or Innovation that have an existing community energy plan are required to include the following data in the application: baseline energy data and energy profile, and justification of project for future community energy development.

### 3.3.5 Energy Resiliency & Monitoring AOF:

Applicants may be eligible for funding up to a maximum of \$135,000 per application in connection with either the development of a new community energy plan or an update to an existing community plan (not both).

Applicants seeking to access funding for the development of a new community energy plan are encouraged, but not required, to have hired a Community Energy Champion (CEC) prior to applying for funding under this AOF.

Applicants seeking funding for updates to an existing community energy plan are required to have hired a CEC prior to applying for funding under this AOF.

The applicable Threshold Amount for a duly qualified single external resource is 40% of the maximum funding amount that is specified in the Funding Agreement for the Energy Resiliency & Monitoring AOF.

**Table 1: Eligible Project Types and Funding Amounts under Areas of Funding**

AREA OF FUNDING	PROJECT TYPES	MAXIMUM FUNDING AMOUNT PER PROJECT TYPE (subject to aggregate AOF funding limits)
<p><b>CAPACITY BUILDING (PART A)</b></p> <p>Aggregate funding limit of \$195,000 per application</p>	<p><b>Community Energy Champion (CEC) Salary:</b> Eligible expenses associated with the salary, wages and benefits, contributions, and assessments associated with employing a CEC as set out below:</p> <ul style="list-style-type: none"> <li>Up to <u>\$55,000 per year</u> for three (3) years; or</li> <li>Up to <u>\$60,000 per year</u> for three (3) years, if applying for and approved for the Additional Qualification Top Up of \$5,000 per year, provided, in each case, adequate progress is being made, as determined in the sole and absolute discretion of the IESO.</li> </ul>	<p>Up to \$180,000 per application</p>

AREA OF FUNDING	PROJECT TYPES	MAXIMUM FUNDING AMOUNT PER PROJECT TYPE (subject to aggregate AOF funding limits)
	<p><b>CEC Expenses:</b> Eligible expenses for relevant training costs for the CEC, and costs for related materials, equipment, travel, products and services that are required to carry out the work of the CEC.</p>	Up to \$15,000 per application
<p><b>CAPACITY BUILDING (PART B)</b></p> <p>Aggregate funding limit of \$150,000 per application</p>	<p><b>Community Energy Engagement:</b> Projects that enhance awareness of, and knowledge about, energy-related issues in First Nation or Métis Communities, or First Nation or Métis Organizations, including, but not limited to, the following:</p> <ul style="list-style-type: none"> <li>• Community workshops and meetings</li> <li>• Youth and Elder specific projects</li> <li>• Activities that educate and enhance energy-related capacity to understand and navigate the current energy environment.</li> </ul>	Up to \$75,000 per application
	<p><b>Energy skills building, project training and certifications:</b> Energy sector skills training programs and certifications that build job-ready capacity and develop tangible skills within First Nation or Métis Communities, or First Nation or Métis Organizations to prepare them to participate in, develop, manage and own energy projects or initiatives, including, but not limited to, the following:</p> <ul style="list-style-type: none"> <li>• Technical capital project training</li> <li>• Energy efficiency technical training</li> <li>• Energy project management certification</li> <li>• Operation and maintenance</li> <li>• Energy financial modeling</li> <li>• Certified Energy Manager (CEM) training</li> </ul>	Up to \$75,000 per application



AREA OF FUNDING	PROJECT TYPES	MAXIMUM FUNDING AMOUNT PER PROJECT TYPE (subject to aggregate AOF funding limits)
	<p><b>Innovative knowledge/data sharing models:</b> Projects that demonstrate and deploy novel initiatives, approaches, or delivery models related to energy issues in First Nation or Métis Communities, or First Nation or Métis Organizations. The application must clearly demonstrate how the project approach or delivery method is unique or innovative within the context of the community or organization, and how the unique or innovative approach will contribute to the success of the project, including, but not limited to the following:</p> <ul style="list-style-type: none"> <li>• Learning or teaching about new and emerging energy topics and projects</li> <li>• New energy skills training and delivery methods</li> <li>• Research and data incorporating Traditional Knowledge</li> <li>• Innovative knowledge sharing among youth and Elders</li> </ul>	Up to \$60,000 per application
<p><b>ECONOMIC DEVELOPMENT</b></p> <p>Aggregate funding limit of \$250,000 per application, which only applies to the following Project Types: Project Development, Feasibility Study, Partnerships, and Innovation.</p>	<p><b>Feasibility Study:</b> Eligible expenses associated with permitting, technical and design assessments, economic assessments, or diesel offset or technology assessments by First Nation or Métis Communities or First Nation or Métis Organizations.</p>	Up to \$50,000 per application

AREA OF FUNDING	PROJECT TYPES	MAXIMUM FUNDING AMOUNT PER PROJECT TYPE (subject to aggregate AOF funding limits)
<p>Aggregate funding limit of \$500,000 for eligible Identified Remote First Nations Communities, which only applies to the following Project Type: Remote Projects Development</p>	<p><b>Partnerships:</b> Eligible expenses associated with due diligence work, including to support procurement processes, required to assess and develop opportunities for First Nation or Métis Communities or First Nation or Métis Organizations to participate in:</p> <ul style="list-style-type: none"> <li>(a) partnerships in new or existing renewable energy projects; or</li> <li>(b) partnerships with licensed transmitters or entities seeking to become licensed transmitters, in future transmission facilities that have been included in regional plans, bulk system plans or the Long Term Energy Plan (LTEP), and for which the Ministry of Energy has determined it prudent to commence development work, including, but not limited to, the transmission line to Pickle Lake, the Northwest Bulk Transmission Line (Waasigan Transmission Line), remote community connections, or others that may be identified to the IESO in writing by the Minister of Energy.</li> </ul>	<p>Up to \$85,000 per application</p>
	<p><b>Project Development:</b> Eligible expenses associated with the development of renewable energy projects by First Nation or Métis Communities, or First Nation or Métis Organizations, on their own or in partnership with a third party. For the purposes of the IESP, project development includes operations and maintenance, minor capital renewable projects (e.g., rooftop solar), and major capital renewable projects (e.g., solar micro-grid).</p>	<p>Up to \$250,000 per application</p>

AREA OF FUNDING	PROJECT TYPES	MAXIMUM FUNDING AMOUNT PER PROJECT TYPE (subject to aggregate AOF funding limits)
	<b>Innovation:</b> Funding support for the demonstration and deployment of innovative delivery models and/or technologies related to renewable energy projects. For the purposes of the Program, this may be demonstrated through emerging technologies, new business models, new practices/regulatory/policy constructs, and existing solutions that are used in novel ways.	Up to \$250,000 per application
	<b>Remote Projects Development:</b> Funding support for eligible expenses associated with the development of renewable energy based solutions to help reduce diesel dependence in Identified Remote First Nations Communities.	Up to \$500,000 per Identified Remote First Nations Community regardless of the number of applications for Projects under this Project Type
<b>ENERGY RESILIENCY &amp; MONITORING</b>  Aggregate funding limit of \$135,000 per application	Development of a new Community Energy Plan	Up to \$135,000 per application
	Updates to an existing Community Energy Plan	Up to \$75,000 per application

### 3.4 Eligible and Ineligible Expenses

Additional criteria regarding Eligible Expenses and a list of Ineligible Expenses are set out in the Funding Agreement, which must be signed by all successful applicants in order to receive funding.

#### 3.4.1 Eligible Expenses

Eligible Expenses can include:

Costs associated with activities carried out by and deliverables delivered by:

- duly qualified internal resources, including the salary, wages and benefits, contributions, and assessments paid to internal resources; and
- duly qualified external resources (i.e., professional and technical consultants and contractors), provided that the costs incurred for the services of a single external resource shall only qualify as Eligible Expenses up to the applicable Threshold Amount, if any;

OR

In the case of the Capacity Building (Part A) AOF:

- Salary, wages and benefits, contributions, and assessments associated with employing a CEC, inclusive of any Additional Qualification Top Up where applicable;
- Relevant training costs for the CEC; and
- Costs for related materials, equipment, travel, products and services that are required to carry out the work of the CEC.

### **3.4.2 Ineligible Expenses**

The following expenses are not eligible for funding under the IESP:

- Costs that are not directly related to the Project, activities or the work of the CEC;
- Costs related to activities for which funding was received in relation to the Project or the work of the CEC from another source;
- Costs that the applicant or joint applicant(s) did not directly incur;
- Costs incurred, or relating to any Project, Project Type, matter or thing carried out before the start of, or after the end of, the Funding Agreement;
- Costs associated with meeting the administrative obligations of the application or Funding Agreement under the IESP, including preparing status and other reports as may be required under the Funding Agreement;
- Costs associated with preparing the application or applications under the IESP, entering into a funding agreement under the IESP, preparing the applications or proposals under any other IESO program, or entering into any other IESO program agreement;
- Costs related to meetings with or the lobbying of any governmental authority or the IESO;
- Costs associated with the use of personal devices (e.g. personal mobile or landline phones, laptops or internet service provider fees, etc.);
- Costs related to administrative operating expenses such as real estate expenses, insurance, utilities, memberships, dues, subscriptions, accounting, or maintenance of equipment;
- Costs incurred that are not evidenced by deliverables, including any supporting documentation required under the Funding Agreement, or other evidence of payment satisfactory to the IESO in its sole and absolute discretion;
- Costs not approved by the IESO as part of the application and budget, unless otherwise agreed to in writing by the IESO in its sole and absolute discretion;
- Costs for travel, hospitality or meals within Ontario that do not comply with the [Ontario Travel, Meal and Hospitality Expenses Directive](#);

- Costs that in the IESO’s view, in its sole and absolute discretion, materially deviate from the approved application in relation to the eligible activities, work plan, budget, project team, timelines or Project description;
- Costs in respect of HST;
- In respect of the Capacity Building (Part A) AOF, costs related to the provision of legal advice or the development or distribution of legal templates, precedent agreements, or materials that are considered or could be considered legal or financial advice;
- In respect of the Capacity Building (Part B) AOF and the Energy Resiliency & Monitoring AOF, costs incurred for the services of a single external resource in excess of 40% of the maximum funding amount specified in the Funding Agreement for the Capacity Building (Part B) AOF or the Energy Resiliency & Monitoring AOF, as the case may be, are also not eligible; and
- In respect of the Economic Development AOF, the following costs are also not eligible:
  - Any amounts paid to a governmental authority, including fees paid for governmental certifications;
  - Partnership-related costs incurred after the applicant’s acquisition of an economic interest in a renewable energy project partnership or transmission project partnership;
  - Costs associated with participating in Ontario Energy Board (“OEB”) proceedings related to an electricity transmission project; and
  - Costs incurred after the OEB designates a transmitter to develop an electricity transmission project, if the designated transmitter is not the applicant or its proposed project partner (or their affiliate).

## 4. Application Submission Process

Applications to the IESP will be accepted on an ongoing basis, with application review windows throughout the year. The application review window dates will be published on [the IESO website](#). Before applying to the IESP, applicants should review these IESP Guidelines and the Funding Agreement carefully, and are encouraged to seek independent legal, business and other professional advice, as appropriate.

The IESP application development process is supportive. Applicants should contact IESP staff with any questions at [IESP@ieso.ca](mailto:IESP@ieso.ca). IESP staff will be available to provide feedback and guidance throughout application development, and may ask for additional information or references. As a condition of funding support, the IESO may request changes to your application. Please allow sufficient time for application review and feedback prior to submitting your final application.

All applications must be submitted via email to [IESP@ieso.ca](mailto:IESP@ieso.ca), using the IESP application form found on [the IESO website](#). Additional details regarding the application submission and review process are

found in Appendix B which is incorporated by reference into the IESP Guidelines. Applicants are encouraged to contact IESP staff prior to submitting an application.

## 5. Application Review Process

Applications that meet the completeness and eligibility requirements of the IESP will be assessed by a review committee comprised of IESO staff that are not responsible for the delivery and oversight of the IESP. The IESO review committee will provide recommendations to the IESO as to whether to approve the application for funding and recommend an amount of funding, if any, from the funding allocated under the IESP Budget. Notwithstanding such recommendation, the IESO maintains the right to accept or reject an application or approve less than the funding amount requested in the application or recommended by the IESO review committee, for any reason, in its sole and absolute discretion, and the allocation of available funding among applications to the IESP is in the sole and absolute discretion of the IESO.

Funding decisions will be based on the extent to which a proposed Project or CEC, as the case may be, addresses community energy needs and the degree to which it satisfies the IESP application review criteria outlined in Table 2.

**Table 2: Application Review Criteria**

<b>Review Criteria</b>	<b>Description</b>
Strategic fit	Will the Project or CEC enhance First Nation or Métis energy-related capacity and leadership and support awareness, education, skills, and/or capacity building, supply-side solutions that contribute to cleaner, more reliable and more affordable energy systems for First Nations and Métis? Where applicable, does the Project relate directly to an existing community energy plan and the short and long-term energy vision of the community or organization?
Community benefit, need, and support	How are community members involved in the Project? How does the Project or CEC benefit the community? Is there an identified need for the Project or CEC? Has a document expressing community support (band council resolution, board resolution, etc.) been included with the application?  Has an engagement plan been developed to specifically target the community or organization? Has appropriate rationale been provided?
Project team and partners (not applicable to Capacity Building (Part A) AOF)	Have a sufficient number of community or organization members been included on the energy team? Does the project team (internal and external resources) have the qualifications and experience required to execute the Project? Is there evidence of strong and appropriate partnerships, if applicable?

<b>Review Criteria</b>	<b>Description</b>
Job description / incumbent qualifications (only applicable to Capacity Building (Part A) AOF)	Is the job description sufficiently detailed and appropriate within the context of the purpose and intended outcome? If an incumbent CEC has been selected, does the incumbent have the skills and experience to successfully meet the purpose and intended outcomes? Where the Additional Qualification Top Up has been requested, does the description express how the particular eligible qualifications of the identified CEC candidate will serve as valuable for the purpose and intended outcomes?
Financial feasibility	Is the budget for the Project or CEC detailed, reasonable and justified? Have revenue sources for costs outside of those assigned to the IESP funding been identified and secured?
Project purpose and outcomes	Are the Project’s purpose and intended outcomes clearly articulated? Is the plan to realize and evaluate the Project’s outcomes sufficiently detailed and reasonable?  If applying for funding under the Economic Development AOF for the Innovation Project Type, is the Project sufficiently innovative? Will it provide a novel solution? Will it address a gap?

Successful applicants will receive an approval letter followed by an offer to enter into the Funding Agreement. Unsuccessful applicants, whether as a result of the available funding being fully allocated or otherwise, will be informed in writing that their application has been rejected and the IESO will provide reasons for such determination. If the application is rejected, any such rejection shall not prohibit an applicant from submitting a new application provided the IESO is still accepting applications. The new application will be subject to the Program Guidelines and Funding Agreement in effect at the time of submission.

## 6. Definitions

Defined Term	Meaning
Additional Qualification Top Up	<p>means the additional funding of \$5,000 per year that successful applicants may be eligible for under the Capacity Building (Part A) AOF in respect of eligible expenses for salary, wages and benefits, contributions, assessments and taxes associated with employing a CEC, where the CEC has one or more of the following qualifications:</p> <ul style="list-style-type: none"> <li>• Canadian Institute of Energy Training (CIET) Certified Energy Manager (CEM);</li> <li>• CIET Certified Energy Auditor (CEA);</li> <li>• successful completion of Indigenous Clean Energy 20/20 Catalyst Program; or</li> <li>• any other certifications or qualifications that may be considered as eligible by the IESO, in its sole and absolute discretion.</li> </ul>
Community Energy Champion or CEC	<p>means a designated energy champion hired by a First Nation or Métis Community, or a First Nation or Métis Organization to support the planning, implementation and evaluation of energy-related priorities.</p>
First Nation or Métis Community	<p>means, for the purposes of the IESP:</p> <ol style="list-style-type: none"> <li>a) a First Nation in Ontario that is a “band” as defined in the <i>Indian Act</i> (Canada);</li> <li>b) the Métis Nation of Ontario or any of its active Chartered Community Councils; or</li> <li>c) a person, other than a natural person, that has previously been determined by the Government of Ontario to represent the collective interests of a community that is composed of First Nation or Métis individuals.</li> </ol>
First Nation or Métis Organization	<p>means, for the purposes of the IESP, an organization that, as determined in the sole and absolute discretion of the IESO, represents the interests of more than one First Nation or Métis Community, or was established to provide key services to one or more First Nation or Métis Communities or members of one or more First Nation or Métis Communities.</p>



<b>Defined Term</b>	<b>Meaning</b>
Funding Agreement	means the prescribed form of agreement entered into between a successful applicant(s) and the IESO in order to be eligible to receive funding under the IESP.
Identified Remote First Nations Communities	means the following four remote First Nations communities, for which, proposed future transmission connection is not identified in the Remote Community Connection Plan as economic: <ul style="list-style-type: none"> <li>(a) Fort Severn First Nation;</li> <li>(b) Kiashke Zaaging Anishinaabek First Nation (Gull Bay);</li> <li>(c) Weenusk First Nation (Peawanuck); and</li> <li>(d) Whitesand First Nation.</li> </ul>
Project	means, in respect of a given application for funding under one or more AOF, a single proposed initiative with a unified scope and related activities across all of those AOF.
Project Overview Application (POA)	means a prescribed form, as amended by the IESO from time to time, which is required to be completed and submitted by an applicant prior to formal application submission and describes the applicant and any project team members; the proposed Project(s); intended outcomes and estimated timeline; requested funding amount; and any other considerations.
Project Type	means, in respect of a Project, the specific funding opportunities listed in each AOF.
Threshold Amount	means the 40% maximum funding amount for a duly qualified single external resource as specified in the Funding Agreement for either the Capacity Building (Part B) AOF or the Energy Resiliency & Monitoring AOF.

## 7. General

- a. Receipt of an application to the IESP 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.
- b. The recommendation from the IESP Review Committee is required prior to the IESO being able to offer a Funding Agreement to the applicant.
- c. IESP funding will only be provided upon execution of the Funding Agreement between the applicant and the IESO, and only according to the terms and conditions therein.
- d. Any financial support provided to an applicant under the IESP does not create a relationship of principal and agent between IESO and the applicant. Further, the applicant has no

authority to create any such relationship or related obligation, express or implied, in the name of or on behalf of, the IESO.

- e. The IESO reserves the right to make public the names of applicants, the title and a description of their proposed project, and the amount of funds applied for. All other information submitted by the applicant in its application will also be treated as non-confidential unless clearly labelled as confidential by the applicant.
- f. In the event of any conflict or inconsistency between the IESP Guidelines and any Funding Agreement entered into, the provisions of the Funding Agreement will govern.
- g. The IESO reserves the right to:
  - 1. periodically review, amend or replace as necessary the IESP, the Program Guidelines, the Funding Agreement and IESP Budget, and any other prescribed forms;
  - 2. make additional amendments in response to directions from the Minister of Energy, changes in applicable laws and regulations, or any other circumstances as determined by the IESO in its sole and absolute discretion; and
  - 3. cap the amount of funding provided under the IESP, including under any AOF or Project Type, in any year.

## Appendix A - Community Energy Plan Mandatory Components

Component	Description
<p>1. Baseline Energy Assessment</p>	<p>A benchmark of the First Nation or Métis Community's, or First Nation or Métis Organization's, current energy performance that allows for the identification of potential opportunities for energy savings. At a minimum, to the extent possible, the baseline energy assessment must include the following data:</p> <ul style="list-style-type: none"> <li>a. Annual energy usage in the First Nation or Métis Community, or First Nation or Métis Organization, based on historical data for at least one prior year;</li> <li>b. Energy generation and consumption broken down by fuel type (i.e. gasoline, propane, wood, diesel, electricity), and consumption data broken down by end use (i.e. residential, commercial, transportation, etc.);</li> <li>c. Energy cost data by fuel type and sector;</li> <li>d. Energy usage trends (i.e., occupancy data; heating; ventilating; cooling; lighting; commercial energy consuming equipment) for residential and commercial buildings;</li> <li>e. A summary of the results of the baseline energy assessment research including a description of the data collection process, methodologies used for data analysis and any energy mapping undertaken; and</li> <li>f. The baseline energy assessment may also include greenhouse gas emissions data and renewable resource potential.</li> </ul>
<p>2. Future Energy Needs and Resources</p>	<p>An assessment of the First Nation or Métis Community's, or First Nation or Métis Organization's, future forecasted energy needs, including options for addressing these identified needs (i.e., conservation, energy efficiency, demand management, renewable energy and small-scale generation).</p>

<b>Component</b>	<b>Description</b>
<p>3. Community Engagement</p>	<p>Identification of concrete ways in which the community energy plan has been tailored to the specific strengths, needs and opportunities of the First Nation or Métis Community, or First Nation or Métis Organization, as demonstrated through direct engagement with community members, constituents, and other relevant parties.</p> <p>A description of how engagement will inform the ongoing development, implementation, and updating of the community energy plan must be included.</p> <ul style="list-style-type: none"> <li>• For a new community energy plan there must be a minimum of three (3) engagements, including one engagement that is specifically geared towards the development of a community energy vision statement as further described below.</li> <li>• For an update to a community energy plan, there must be a minimum of one (1) engagement.</li> </ul>
<p>4. Community Energy Vision Statement</p>	<p>A community energy vision statement must be developed and included as part of the community energy plan.</p> <ul style="list-style-type: none"> <li>• For a new community energy plan, a community energy vision statement should be developed through the targeted community visioning engagement. This engagement should identify the core values and the vision the community holds for its energy future.</li> <li>• For an update to a community energy plan, a community energy vision statement should be developed with input from the community, but does not require a targeted engagement.</li> </ul>
<p>5. Short, Medium, and Long Term Energy Goals</p>	<p>Identification of specific energy goals that follow the SMART model (i.e., specific, measurable, actionable, realistic, and time-bound), align with the community energy vision statement, and provide more detailed information about the outcomes that the community seeks to achieve. The goals should be organized into short term (1 year), medium term (2-5 years), and long term (5+ years) time horizons.</p>

<b>Component</b>	<b>Description</b>
6. Implementation Plan	<p>Identification of actionable ways to meet energy needs and achieve community energy goals with a clearly defined implementation plan. For each energy goal, a corresponding list of community energy actions that describe the specific actions to be taken as a pathway to achieving an energy goal must be outlined. Each community energy action under an energy goal must have a corresponding anticipated timeline and estimated budget, as well as a description of the specific funding programs and incentives that may be accessed and the identification of other mechanisms for funding the community energy action.</p> <p>For example:</p> <p>Community Energy Goal:</p> <ul style="list-style-type: none"> <li>• Community Energy Action 1 <ul style="list-style-type: none"> <li>a. Anticipated Timeline</li> <li>b. Estimated Budget</li> <li>c. Potential Funding Programs, Incentives and Other Funding Mechanisms</li> </ul> </li> </ul>

## Appendix B – Application Submission and Review Process

Steps	Timeline
Step 1: The Application	<p>The Program Guidelines will help you understand what you need to do. Please thoroughly review it and the application template prior to starting an application. We are here to support you if you have questions. We encourage you to contact us before you begin your application at <a href="mailto:IESP@ieso.ca">IESP@ieso.ca</a></p>
Step 2: Project Overview Application	<p>Applicants must submit a Project Overview Application (POA) containing high-level details on the Project, including scope and anticipated outcomes.</p> <p>IESP staff will review POAs on an on-going basis.</p>
Step 3: Interview	<p>Based on the POA, IESP staff may request an interview with the applicant(s) to further discuss project details ahead of formal application submission.</p>
Step 4: Application Submission	<p>Submit your application to <a href="mailto:IESP@ieso.ca">IESP@ieso.ca</a>. For more information about application submission timelines, please visit <a href="#">the IESO website</a>.</p> <p>Please be sure to PDF all materials where possible, and ensure you have double checked the submission checklist in the application.</p> <p>Late or incomplete application submissions will not be accepted, unless the IESO has been notified in advance of the intake deadline and agreed to accept an application submission after the intake deadline.</p>
Step 5: Initial Review	<p>Within 30 business days of receiving the application, we will do our best to review it for completeness and eligibility. A clarification and feedback period may be included as part of the initial review to request additional information or amendments to the application.</p> <p>If your application passes the completeness and eligibility review, we will give it a validated time stamp, and communicate to you that it has been accepted for further consideration.</p>
Step 6: Review Committee	<p>Next, the application will be reviewed by an internal review committee based on the criteria outlined in the Program Guidelines. This can include project scope, feasibility, project team and other considerations related to the program.</p>

<b>Steps</b>	<b>Timeline</b>
Step 7: Funding Agreement	If your application is successful, you will be notified by email and offered a Funding Agreement with the IESO (see a <a href="#">sample Funding Agreement</a> ).

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