



## PRELIMINARY ENGINEERING STUDY: PROPOSAL CHECKLIST

### ESSENTIAL INFORMATION

1. Provide a brief description of the Industrial System to be studied, why this System was chosen for study and how it will reduce electricity use.

*[This could include approximate motor HP, hours of operation, control method (if any), annual electricity consumption of the Industrial System, any pre-study estimates of Electricity Savings and Project costs for each proposed Electricity Savings Measure.]*

2. Clearly define the study scope and deliverables, including a description of the methodology/approach that will be used to determine the Electricity Savings and capital costs for the Electricity Savings Measure(s). (Reference: Preliminary Engineering Study Contract - Exhibit B Preliminary Engineering Study Minimum Requirements)

*[This could include the Final Report, energy models, (such as spreadsheets), design drawings, data logs, etc. As well as the proposed approach for data collection and analysis.]*

3. Ensure that the Proposal indicates that the report will provide Electricity Savings estimated to an accuracy of +/- 30%, and Project costs estimated to an accuracy of +/- 50%.

### SUPPORTING INFORMATION

4. Provide a breakdown of travel costs and other expenses. Please adhere to the Ontario Government's policy for consultants and expenses. *[For more information please visit [www.doingbusiness.mgs.gov.on.ca](http://www.doingbusiness.mgs.gov.on.ca)]*

5. Provide the engineering firm/consultant's general information.

*[This could include legal business name, alternate names, contact information and primary contact person. Note that a Certificate of Authorization from PEO is required to offer consulting services in Ontario.]*

6. Provide a proposed study timeline, schedule of effort and resource allocation for major tasks.

*[This could include the following key milestones: study kick-off, Draft Report submission and Final Report submission.]*

### ADDITIONAL INFORMATION - DEPENDING ON NATURE OF SAVINGS MEASURE

7. Provide a description of the approach to be used to quantify the benefits associated with any non-energy benefits. *[This could include lower operating and maintenance costs.]*

8. Provide a disclosure of any real or perceived conflict of interest for this Project.

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The PROCESS AND SYSTEMS Upgrade Initiative - PRELIMINARY ENGINEERING STUDY PROPOSAL CHECKLIST is provided only as a guide to assist Applicants in preparing Applications for a Preliminary Engineering Study Incentive and is not binding on the OPA. The OPA is not required to accept Applications that conform to this Checklist. The OPA may change, modify, amend or update the PROCESS AND SYSTEMS Upgrade Initiative from time to time. While the OPA will endeavour to keep the Checklist current, the OPA cannot guarantee its accuracy or completeness. Please refer to the Preliminary Engineering Study Funding Contract, as applicable, for the most up-to-date terms and conditions.