

Incentive Stacking Process and Requirements

Building Energy Retrofit Accelerator (BERA) and Energy Savings for Business (ESB) Programs
March 1, 2021

Background

The City of Edmonton (COE) launched the Building Energy Retrofit Accelerator (BERA) Program, an incentive program that provides financial incentives for deep-green energy efficiency upgrades and Greenhouse Gas (GHG) reductions to commercial and institutional buildings in Edmonton. To learn more, please head to the [BERA Program website](#).

The Emissions Reduction Alberta's (ERA) Energy Savings for Business (ESB) Program helps accelerate the uptake of commercially available energy saving technologies throughout Alberta. ESB is focused on supporting a critical component of the economy – small- and medium-sized businesses. To learn more, please head to the [ESB Program website](#).

The COE and ERA recognize the benefits to Edmonton businesses of participating in both programs. Specific upgrades and equipment, referred to as measures, overlap between the two programs. Each program offers unique measures, where overlapping measures exist, we welcome eligible projects to consider accessing funding from both programs. This document outlines the process and requirements that must be met to receive funding from both programs as well as combined funding limitations.

Incentive Stacking

Participants with facilities **in Edmonton** are eligible to receive funding from each program independently up to a maximum amount if they meet all program eligibility criteria from each program. Eligibility requirements can be found in each programs' Terms and Conditions, available on their respective websites. Please note that the same measure may have different eligibility requirements between the two programs and therefore, it's the applicant's responsibility to check the program requirement for eligible measures stacking.

If a participant seeks to receive an incentive for the same measure from both programs, they can access the lesser of:

- The sum of the individual maximum incentive value per measure from each individual program,
- A maximum combined incentive total from both programs of 50% of the total eligible costs per measure, or
- Either of the above totals, reduced as a result of other program limits (including but not limited to project or participant funding limits).

As described in the program Terms & Conditions, by accepting ESB or BERA funding for a project, participants will assign ownership of all environmental attributes or environmental products generated over the life of the project to ERA and COE.

Stacking is not eligible with the Building Energy Benchmarking Program or the Change Homes for Climate Solar Program. BERA offers bonus incentives for those implementing multiple measures, however, these bonuses are not available for projects that are utilizing stacking.

Example Incentive:

Jane Smith is planning to install five 3.00 hp Variable Frequency Drives (VFD). She gets a quote of \$5,644 for the project including equipment, labour and design costs. Jane applies for pre-approval from the ESB program, which provides an incentive of \$125 per hp up to a maximum of 50% of eligible expenses. Jane also applies for the BERA program, which provides an incentive of \$144 per hp.

Once Jane receives pre-approval from both programs, she can begin installing her VFDs. When the project is complete, Jane submits her final documentation to both programs. ESB completes the final approval and incentive payment first. From ESB, Jane will receive an incentive payment of:

- \$1,875 ($\$125 \text{ per hp} * 5 \text{ VFDs} * 3\text{hp}$), which is under the ESB measure maximum threshold of 50% of eligible expenses (\$2,822).

After ESB, BERA will complete their final approval and Jane will receive an incentive payment of:

- \$947, which is the lesser of the potential BERA incentive ($\$144 \text{ per hp} * 5 \text{ VFDs} * 3\text{hp} = \$2,160$) and the 50% combined incentive stacking limit (maximum combined incentive is 50% of \$5,644 eligible expenses = \$2,822. BERA incentive is \$2,822 - \$1,875 ESB incentives = \$947).

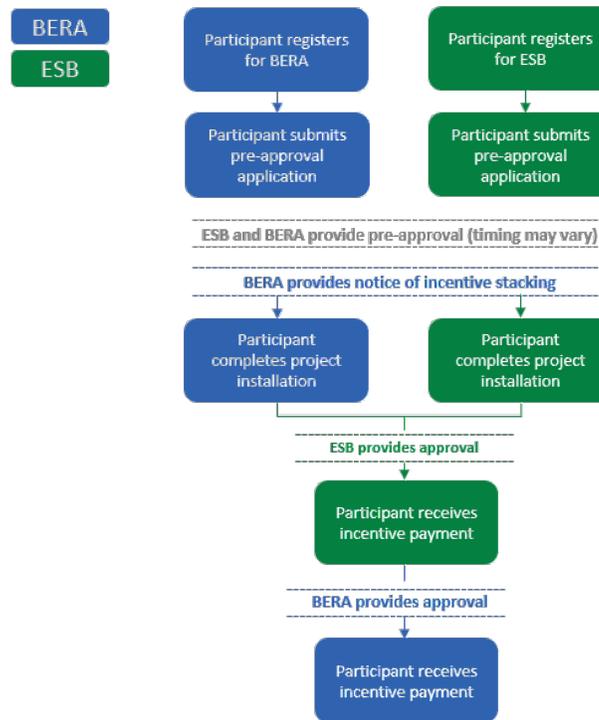
In total, Jane receives \$2,822 from utilizing both programs (\$1,875 ESB + \$947 BERA).

Process

The following outlines the process for how the ESB and COE programs will interact to ensure a streamlined and easy experience.

1. Participant registers for each program.
2. Participant submits a pre-approval application to each program (BERA's Post-Approval applicant stream is not available for stacked applications). In the application, the participant must disclose that they are applying for or receiving funding from another program, such as BERA or ESB.
3. BERA and ESB will complete their reviews and approvals independently based on each program's requirements. Participants will receive project pre-approvals from BERA and ESB (timing on these may vary).
4. BERA will notify the participant when a project is subject to program stacking (projects pre-approved for both programs with applicable measures) and that BERA final incentives will be subject to the additional incentive stacking limitations, timelines, and processes.
5. Participant and their contractor purchase the equipment and complete the project installation.
6. Participant submits the final (post-project) applications to each program.
7. ESB will provide approval first for the final application and issue incentive payment(s).
8. BERA will provide final approval after ESB for applications with the same measure(s) for the same projects and issues adjusted incentive payment(s) as applicable.

Process Flow



Overlapping Measures

To see the full eligible measures for the BERA and ESB programs please visit their respective websites. Please note that ESB will be adding measures to the program, so stay tuned for more stacking opportunities as these are released.

The following are measure types that may overlap between the two programs (measure categories, names and product-specific eligibility criteria may vary between the programs for equivalent technologies):

Lighting
LED Exit signs
Linear or Suspended Fixtures
Exterior LED Fixtures
Accent or Track Lighting
Bay LED Fixture
Refrigerated Case Lighting LED
Lighting Controls
Daylight Controls
Occupancy Controls
Exterior Controls
Refrigeration
Automatic Door Closer
Motors and Drives
Variable frequency drive (VFD) for pumps and motors

HVAC
Condensing boilers
High efficiency furnaces
Demand control ventilation
Condensing storage water heater
Condensing tankless water heater
Heat and energy recover ventilators
Building Envelope and Windows
Ceiling and wall insulation
High efficiency windows

Please note, the Eligible Measures lists and Terms and Conditions available on the BERA and ESB websites supersede any inconsistencies, conflicts, or ambiguities with this document.