

Section 1: APPLICATION INSTRUCTIONS

Please ensure that this Application is:

- completed by the Applicant in full with all requested information
- signed by both the Applicant and all Participants
- submitted with all supporting documentation

Incomplete Applications will not be considered or processed.

Submit to efficiency.training@ieso.ca

Section 2: APPLICANT INFORMATION (Incentive will be paid to the Applicant ONLY)

The Incentive is available to an organization/employer (the "Applicant") that sends qualifying full-time employees/members to a training Initiative.

Legal Name of Applicant
(Organization/Employer of Participant(s))

Applicant Representative Name

Title

Address

City

Prov

Postal Code

Phone

Email

Applicant Representative
Signature* (E-signature acceptable)

Date

Section 3: PARTICIPANT INFORMATION

If more than one Participant attends a selected Initiative, please complete the **Multiple Participant Form**

Participant Name

Title

Address

City

Prov

Postal Code

Phone

Email

Participant Signature*
(E-signature acceptable)

Date

*By signing and submitting this Application, the Applicant and Participant(s) each certify that all information contained herein is true, complete and accurate as stated in this Application and as of the date(s) written above. The Applicant and Participant agree to be bound by the terms and conditions of the attached Training and Support Incentive Agreement. The Applicant further agrees that the IESO may, in its sole discretion, reject the Application or any evidence in support of the Application for any reason, or request further evidence or verification, or contact any person to verify that the information stated in the Application is correct.

Section 4: SUPPORTING DOCUMENTS FOR ALL INITIATIVES SELECTED

Please ensure the following required supporting documentation is submitted with this Application.

✓ Copy of **original invoice** made out to the Applicant or Participant for the Initiative fees
*(Ensure that invoice **clearly shows** name of course provider, course cost, date and location of training)*

✓ Copy of any **professional certification** received through CEM, CMVP, CEA, BOC and Commissioning Professional initiatives. For other initiatives, evidence of successful completion provided by training and support provider

✓ For Custom Training: IESO pre-approval document provided by training provider

Section 5: INITIATIVES for Save on Energy Incentives

UNION GAS OR ENBRIDGE BUSINESS CUSTOMERS:

For Save on Energy/Union Gas or Save on Energy/Enbridge Joint Incentives for BOC, CEM and Dollars to Sense initiatives, please apply in **SECTION 6**

Please select the Initiative(s) for which this Application is being submitted.

Each Initiative has specific criteria for eligibility. Please ensure that all requirements for each Initiative selected have been read and that each Participant meets the requirements. Training and Support Incentives cover course, exam and/or certification fees only, and exclude taxes. All dollar amounts are in Canadian dollars.

Building Operator Certification (BOC)

SOE Training and Support Incentive covers 50% of course/exam fees up to a maximum of \$1,500

- ✓ The Participant has completed the course and exam provided by the Canadian Institute for Energy Training ("CIET") and has received professional certification.
- ✓ The Participant is currently employed with an accountability for building operations & maintenance or energy management of a commercial, institutional or industrial facility in Ontario with a minimum of 50,000 sq. ft.
- ✓ The Participant has two years or more of experience working in an environment as specified above, OR at minimum has one year of experience AND one year of college level education in a facilities operations & maintenance-related program.

Building Commissioning Professional Certification

SOE Training and Support Incentive covers 50% of course/exam fees up to a maximum of \$1,600

- ✓ The Participant completed the course and/or exam provided by the Canadian Institute for Energy Training ("CIET"), the American Society of Heating, Refrigeration, and Air-Conditioning Engineers ("ASHRAE"), or the Building Commissioning Association ("BCA") and received professional certification.
- ✓ The Participant is currently employed to provide commissioning services for new or existing commercial, institutional or industrial facilities in Ontario.

RETScreen Expert Training

SOE Training and Support Incentive covers 50% of course fees up to a maximum of \$900

- ✓ The Participant completed course provided by a recognized provider of RETScreen Expert training as listed on the Save on Energy website.
- ✓ The Participant is currently employed with an accountability for, or providing services for, energy management or building operations in commercial, institutional, or industrial facilities in Ontario.
- ✓ For IESO-sponsored one-year subscription to RETScreen Expert Professional mode (valid only on a two- or three-day training):
The Participant and/or the Applicant organization are new subscribers and have not previously received a free or paid one-year subscription to RETScreen Expert Professional mode.

Energy Efficient Building Operations

SOE Training and Support Incentive covers 50% of workshop fees up to a daily maximum of \$300

- ✓ The participant completed the workshop offered by Local Authority Services (LAS) in partnership with Tds Dixon Inc. (KnowEnergy).
- ✓ The participant is currently employed with an accountability for energy management or building operations of a public sector facility in Ontario.

Certified Energy Manager (CEM)

SOE Training and Support Incentive covers 50% of course/exam fees up to a maximum of \$1,600

- ✓ The Participant completed the course and exam provided by the Canadian Institute for Energy Training ("CIET") or the Association of Energy Engineers ("AEE") and has received professional certification (CEM or EMIT).
- ✓ The Participant is currently employed with an accountability for, or providing services for, building operations & maintenance or energy management of a commercial, institutional or industrial facility, or facilities, in Ontario with a minimum of 50,000 sq. ft.
- ✓ The Participant has two years or more of experience working in an environment as specified above, OR at minimum has one year of experience AND one year of college level education in a facilities operations & maintenance-related program.

End-use Training

SOE Training and Support Incentive covers 50% of course fees up to a maximum of \$750

- ✓ The Participant completed a course provided by a recognized provider of the Compressed Air Challenge or Pump System Optimization training; or HVAC Optimization for High Performance Sustainable Buildings training provided by BOMI and within 3 months of registration.
- ✓ The Participant is currently employed with an accountability for, or providing services for, energy management or building operations in a commercial, institutional, or industrial facility, or facilities, in Ontario.
- ✓ The Participant has two years or more of experience working in an environment as specified above, OR at minimum has one year of experience AND one year of college level education in a facilities operations & maintenance-related program.

Dollars to Sense Workshops

SOE Training and Support Incentive covers 50% of each workshop fee per participant up to a daily maximum of \$300

- ✓ The Participant completed one or more workshops provided by the Canadian Institute for Energy Training ("CIET") or Tds Dixon Inc.
- ✓ The Participant is currently employed with an accountability for, or providing services for, energy management or building operations in a commercial, institutional, or industrial facility, or facilities, in Ontario.

Certified Measurement & Verification Professional (CMVP)

SOE Training and Support Incentive covers 50% of course/exam fees up to a maximum of \$1,300

- ✓ The Participant completed the course and exam provided by the Canadian Institute for Energy Training ("CIET"), the Association of Energy Engineers ("AEE"), or the Efficiency Valuation Organization ("EVO") and has received professional certification (CMVP or MVIT).
- ✓ The Participant is currently employed to provide measurement and verification services for electricity conservation projects to commercial, institutional or industrial customers in Ontario.

Advanced Building Recommissioning

SOE Training and Support Incentive covers 50% of course fees up to a maximum of \$875

- ✓ The Participant completed the course provided by the Canadian Institute for Energy Training ("CIET").
- ✓ The Participant is currently employed as a continuous optimization (RCx) service provider, recommissioning agent, building operator, energy manager or facility manager in a commercial, institutional or industrial facility in Ontario with a minimum of 50,000 sq.ft.
- ✓ The Participant has two years or more of experience working in an environment as specified above, and is an engineer registered with the Professional Engineers of Ontario.

Certified Energy Auditor

SOE Training and Support Incentive covers 50% of course fees up to a maximum of \$1300

- ✓ The Participant completed the course provided by the Canadian Institute for Energy Training ("CIET"), or the Association of Energy Engineers ("AEE") and has received certification (CEA or CEAIT).
- ✓ The Participant is currently employed to provide energy auditing services for new or existing commercial, institutional or industrial facilities in Ontario.

Custom Training

SOE Training and Support Incentive covers 50% of each custom training fee per participant up to a daily maximum of \$300

- ✓ The Participant completed one or more pre-approved custom training courses provided by a pre-approved training provider.
- ✓ The Participant is currently employed with an accountability for energy management or building operations in commercial, institutional or industrial facilities in Ontario

Section 6: INITIATIVES for Save on Energy/Union Gas or Save on Energy/Enbridge Joint Incentives

Please select the Initiative(s) for which this Application is being submitted.

Each Initiative has specific criteria for eligibility. Please ensure that all requirements for each Initiative selected have been read and that each Participant meets the requirements. Joint Incentives cover course, exam and/or certification fees only, and exclude taxes. All dollar amounts are in Canadian dollars.

Check here for Union Gas business customer

Building Operator Certification (BOC)

Joint Incentives cover 75% of course fees up to a maximum of \$2350

- ✓ The Participant has completed the course and exam provided by the Canadian Institute for Energy Training ("CIET") and has received professional certification.
- ✓ The Participant is currently employed with an accountability for building operations & maintenance or energy management of a commercial, institutional or industrial facility in Ontario with a minimum of 50,000 sq. ft.
- ✓ The Participant has two years or more of experience working in an environment as specified above, OR at minimum has one year of experience AND one year of college level education in a facilities operations & maintenance-related program.

Check here for Enbridge business customer

Certified Energy Manager (CEM)

Joint Incentives cover 75% of course/exam fees up to a maximum of \$2,500

- ✓ The Participant completed the course and exam provided by the Canadian Institute for Energy Training ("CIET") or the Association of Energy Engineers ("AEE") and has received professional certification (CEM or EMIT).
- ✓ The Participant is currently employed with an accountability for, or providing services for, building operations & maintenance or energy management of a commercial, institutional or industrial facility in Ontario with a minimum of 50,000 sq. ft.
- ✓ The Participant has two years or more of experience working in an environment as specified above, OR at minimum has one year of experience AND one year of college level education in a facilities operations & maintenance-related program.

Dollars to \$ense Workshops

Joint Incentives cover 75% of each workshop fee per participant up to a daily maximum of \$500

- ✓ The Participant completed one or more workshops provided by the Canadian Institute for Energy Training ("CIET") or Tds Dixon Inc.
- ✓ The Participant is currently employed with an accountability for energy management or building operations of a commercial, institutional, or industrial facility in Ontario with a minimum of 50,000 sq. ft.



Section 7: Training and Support INCENTIVE AGREEMENT

Terms and Conditions

The Applicant has applied for a Training and Support incentive ("Incentive"), pursuant to the Application submitted to the Independent Electricity System Operator ("IESO") for an IESO-recognized third party training and support initiative (the "Initiative").

THE IESO RESERVES THE RIGHT, IN ITS SOLE DISCRETION, TO REJECT APPLICATIONS, OR CHANGE INITIATIVE RULES, FOR ANY REASON. ONLY APPLICATIONS THAT ARE COMPLETE AND MEET THE CRITERIA OUTLINED IN THE INCENTIVE AGREEMENT WILL BE CONSIDERED. THE TRAINING AND SUPPORT INCENTIVE IS AVAILABLE UNTIL DECEMBER 31, 2020 BUT MAY BE CANCELLED AT ANY TIME WITHOUT PRIOR NOTICE.

1. The Applicant confirms that no Incentive has been paid out to it or any Participant in respect of the Participant(s) for the Initiative(s) outlined in this Application.
2. The Applicant confirms that it or a Participant has paid the invoice(s) attached to this Application for the Initiative(s) in full.
3. The Applicant confirms that this Application is submitted within eight (8) months of the Participant(s) completing the Initiative(s).
4. The Applicant confirms that any and all Participants were employed by, or are members of, the Applicant at time of Initiative participation, and continue to be full-time employees and/or members as of the date of Application submission.
5. The Applicant and Participant(s) each confirm that they are either a resident of Ontario and/or operating in Ontario or conducting business in Ontario.
6. Applicant and Participant(s) each confirm that all of the eligibility requirements for each Initiative selected have been met.
7. If the IESO approves the Application, the IESO will, subject to the terms and conditions of this Agreement and the Application, pay to the Applicant an Incentive for the Initiative(s) selected in the Application according to the Incentive amount up to the maximum limit in effect at the time of the Application submission.
8. The Applicant and the Participant(s) agree that each may share information with the IESO required to verify this Application, and the IESO may contact the Applicant or Participant(s) to conduct interviews, surveys or audits for the purposes of Initiative evaluation, verification, measurement or management.
9. The Applicant and the Participant(s) understand and agree that by submitting the Application, whether or not this Application is accepted: (a) each hereby consents to the collection, use, disclosure and other handling of any information it provides to the IESO, including personal information and records pursuant to the *Freedom of Information and Protection Act* (the "Information") relating to the operation, administration or assessment of the Initiative or the Application or the Agreement, and in connection with any reporting activities relating to the Initiative, which shall include, without limitation: (i) sharing of Information with Initiative evaluation consultants, service providers and training and support service providers; (ii) use by these parties of the Information to conduct, analyze and report on the results of surveys and modify the Initiative based on such surveys; and (iii) disclosure to the Ontario Energy Board, the Ontario Ministry of Energy or the Ontario Environmental Commissioner or their respective successors; (b) each hereby consents to the disclosure by the IESO to local distribution companies of information regarding the Applicant or Participant's past participation in other IESO-funded conservation and demand management programs for the purpose of processing the Initiative evaluation; and (c) each will indemnify and save harmless the IESO, Union Gas Limited, Enbridge Gas Distribution Inc., its service providers and its respective directors, officers and employees from any and all liability and all claims, losses, damages (including indirect or consequential damages), expenses and proceedings for personal injury (including death) or property damage of any person relating to, in connection with, resulting from, or arising out of the Initiative.
10. The Applicant and the Participant(s) understand that in connection with surveys, studies, audits and promotions of Save on Energy-related initiatives, the IESO may contact them directly. The Applicant and the Participant(s) also consent to the IESO contacting them including by email and other electronic communication for purposes of follow-up surveys, studies and audits, future conservation programs, customer satisfaction surveys, and other related purposes and understand that they may withdraw this consent at any time by contacting the IESO at 120 Adelaide Street West, Suite 1600, Toronto, ON M5H 1T1 or efficiency.training@ieso.ca.
11. Except as otherwise provided, the terms and conditions as outlined in this Agreement and the Application constitute the entire agreement between the parties in connection with its subject matter and supersede all prior representations, communications, negotiations and understandings, whether oral, written, express or implied, concerning the subject matter of this Agreement. This Agreement may not be varied, amended or supplemented except by an agreement executed by all of the applicable parties. Each of the parties will, from time to time, on written request of the other party, do all such further acts and execute and deliver or cause to be done, executed and delivered all such further things as may be reasonably required in order to fully perform and to more effectively implement the terms of this Agreement. This Agreement will be governed by and construed in accordance with the laws of the Province of Ontario and the federal laws of Canada applicable therein. The invalidity, unenforceability or illegality of any provision in this Agreement will not, to the extent permitted by applicable laws, affect the validity, enforceability or legality of any other provision of this Agreement, which will remain in full force and effect.
12. Each party to this Agreement will comply, in all material respects, with all laws and regulations required to be complied with in the performance of its obligations hereunder.
13. The Applicant and the Participant(s) understand and agree that non-compliance with the terms and conditions of the Agreement may result in revocation of Incentive amounts.

For Save on Energy/Union Gas or Save on Energy/Enbridge Joint Incentives only:

In addition to the above Terms and Conditions, the following Terms and Conditions apply for the Save on Energy/Union Gas and/or Save on Energy/Enbridge ("Joint Incentives"):

1. The Applicant must have an active Union Gas Limited ("Union Gas") business account in good standing or an active Enbridge Gas Distribution Inc. ("Enbridge") account in good standing.
2. If the IESO approves the Application, Union Gas or Enbridge will, subject to the terms and conditions of this Agreement and Application, and within 90 business days, pay directly to the Applicant an Incentive for the Initiative(s) selected in the Application up to or equal to 30% of course fees up to a maximum limit of (i) \$200 per day for Dollars to Sense, (ii) \$750 for Building Operator Certification, and (iii) \$900 for Certified Energy Manager.
3. If the IESO approves the Application, the IESO will, subject to the terms and conditions of this Agreement and the Application, and within 90 business days, pay to the Applicant an Incentive for the Initiative(s) selected in the Application up to or equal to 45% of course fees up to a maximum limit of (i) \$300 per day for Dollars to Sense, (ii) \$1600 for Building Operator Certification, and (iii) \$1600 for Certified Energy Manager.
4. The Applicant consents to the IESO sharing Applicant information with Union Gas or Enbridge for the purposes of confirming the Union Gas or Enbridge account, submitting payment to the Applicant address, and contacting the Applicant in connection to the foregoing.
5. The Save on Energy/Union Gas Joint Incentive only applies for courses taken after January 1, 2018.
6. The Save on Energy/Enbridge Joint Incentive only applies for courses taken after April 6, 2018.
7. Union Gas or Enbridge reserves the right to reject an application for any reason.