

TRAINING AND SUPPORT INCENTIVE APPLICATION FORM



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

Submit to efficiency.training@ieso.ca

Incomplete applications will not be considered or processed.

SECTION 2: APPLICATION INFORMATION (INCENTIVES WILL BE PAID TO THE APPLICANT ONLY)

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

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

Enbridge Gas Inc. Business or Industrial Customer: **Yes** **No**

If you are an Enbridge Gas Inc. ("Enbridge") Business or Industrial Customer, you may be eligible to receive a Save on Energy/Enbridge Joint Incentive for the Certified Energy Manager (CEM), Certified Sustainable Building Operator (CSBO) and Dollars to \$ense training courses described in Section 6.

If you wish to apply for one or more Joint Incentives, please select the "Yes" box above and complete Section 6 of this Application.

If you are eligible to receive a Joint Incentive, you will not be eligible to receive a Save on Energy Incentive under Section 5 for the same training course.

If you are not an Enbridge Business or Industrial Customer, you are not eligible to receive the Joint Incentives described in Section 6. Please complete only Section 5.

SECTION 3: PARTICIPANT INFORMATION

If more than one participant attends a selected training course, 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 TRAINING COURSES 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 training course fees, and, if applicable, please disclose any other incentives received or applied for that cover a portion of the training course fee. Only training course fees incurred by the Applicant or Participant (i.e. those not covered by other incentives) are eligible for reimbursement pursuant to this Agreement.

(Ensure that invoice **clearly shows**: name of training course provider, cost, date and location of training.)
- ✓ Copy of any **professional certification** received through CBCP, CEA, CEM, CMVP, CSBO and PMVA. For other training courses, evidence of successful completion provided by training course provider.

SECTION 5: TRAINING COURSES FOR SAVE ON ENERGY INCENTIVES

Please select the training course(s) for which this Application is being submitted. If you are an Enbridge Business or Industrial Customer, and you are applying for a CEM, CSBO and/or Dollars to Sense training course incentive, do not select the applicable training course under SECTION 5. Please complete SECTION 6 and apply for a Joint Incentive instead.

Each training course has specific criteria for eligibility. Please ensure that all requirements for each training course 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. For certainty, if any portion of the training course fees is covered by other incentives, such amounts will not be eligible for reimbursement and will be excluded from the Save on Energy Incentive calculation. All dollar amounts are in Canadian dollars.

Achieving Net-Zero Buildings

- ✓ Individuals currently employed with an accountability for, or providing services for, energy management or building operations at a commercial, institutional or industrial facility, or facilities, in Ontario.
- ✓ Up to 50% or up to \$550 of course fees for eligible participants.
- ✓ Received upon the completion of training offered by Canadian Institute for Energy Training (CIET).

Building Energy Modelling

- ✓ Individuals currently employed with an accountability for, or providing services for, energy management or building operations at a commercial, institutional or industrial facility, or facilities, in Ontario.
- ✓ Up to 50% or up to \$550 of course fees for eligible participants.
- ✓ Received upon the completion of training offered by Canadian Institute for Energy Training (CIET).

Certified Building Commissioning Professional (CBCP)

- ✓ Individuals currently employed to provide commissioning services for new or existing commercial, institutional or industrial facilities in Ontario.
- ✓ Up to 50% or up to \$1,600 of course fees for eligible participants.
- ✓ Received upon the successful completion of the Building Commissioning Professional Certification training and exam offered by Canadian Institute for Energy Training (CIET), American Society of Heating, Refrigeration and Air-Conditioning Engineers (ASHRAE) or Building Commissioning Association (BCA).

SECTION 5: TRAINING COURSES FOR SAVE ON ENERGY INCENTIVES (CONTINUED)

Certified Energy Auditor (CEA)

- ✓ Individuals currently employed to provide energy auditing services for new or existing commercial, institutional or industrial facilities in Ontario.
- ✓ Up to 50% or up to \$1,100 of course fees for eligible participants.
- ✓ Received upon the successful completion of the Certified Energy Auditor (CEA) training and exam offered by Canadian Institute for Energy Training (CIET) or Association of Energy Engineers (AEE).

Certified Energy Manager (CEM)

- ✓ Individuals currently employed with an accountability for providing services in building operations and maintenance or energy management of a large commercial, institutional or industrial facility in Ontario.
- ✓ Individuals who have two or more years of experience working in an environment as specified above, OR who have one year of experience and one year of college-level education in a facilities operations and maintenance-related program.
- ✓ Up to 50% or up to \$1,600 of course fees for eligible participants.
- ✓ Received upon the successful completion of the Certified Energy Manager (CEM) training and exam offered by Canadian Institute for Energy Training (CIET) or Association of Energy Engineers (AEE).

Certified Measurement and Verification Professional (CMVP)

- ✓ Individuals currently employed to provide measurement and verification services for electricity efficiency projects to commercial, institutional or industrial customers in Ontario.
- ✓ Up to 50% or up to \$1,300 of course fees for eligible participants.
- ✓ Received upon the successful completion of Certified Measurement and Verification Professional (CMVP) training and exam offered by Canadian Institute for Energy Training (CIET) or Association of Energy Engineers (AEE).

Certified Sustainable Building Operator (CSBO)

- ✓ Individuals currently employed with an accountability for, or providing services for, energy management or building operations at a commercial, institutional or industrial facility, or facilities, in Ontario.
- ✓ Up to 50% or up to \$1,500 of course fees for eligible participants.
- ✓ Received upon the successful completion of the Certified Sustainable Building Operator (CSBO) training and exam offered by Canadian Institute for Energy Training (CIET).

Dollars to \$ense Energy Management Workshops

- ✓ Individuals currently employed with an accountability for, or providing services for, energy management or building operations at a commercial, institutional or industrial facility, or facilities, in Ontario.
- ✓ Up to 50% or up to \$300 per day for any full-day standard or customized workshop for eligible participants.
- ✓ Received upon the successful completion of a Dollars to \$ense workshop offered by Canadian Institute for Energy Training (CIET) or TdS Dixon Inc. (KnowEnergy).

Existing Building Recommissioning

- ✓ Individuals currently employed as a continuous optimization (RCx) service provider, recommissioning agent, building operator, energy manager or facility manager in an existing commercial, institutional or industrial facility in Ontario with a minimum size of 50,000 sq. ft.
- ✓ Up to 50% or up to \$950 of course fees for eligible participants.
- ✓ Received upon the completion of training offered by Canadian Institute for Energy Training (CIET).

Energy Efficiency Building Operations (EEBO)

- ✓ Individuals currently employed with an accountability for, or providing services for, energy management or building operations at a commercial, institutional or industrial facility, or facilities, in Ontario.
- ✓ Up to 50% or up to \$300 per day for each workshop fee for eligible participants.
- ✓ Received upon the completion of training offered by Canadian Institute for Energy Training (CIET), TdS Dixon Inc. (KnowEnergy) or Local Authority Services (LAS).

Energy Management and the ISO 50001 Standard

- ✓ Individuals currently employed with an accountability for, or providing services for, energy management or building operations at a commercial, institutional or industrial facility, or facilities, in Ontario.
- ✓ Up to 50% or up to \$350 of course fees for eligible participants.
- ✓ Received upon the completion of training offered by Canadian Institute for Energy Training (CIET).

SECTION 5: TRAINING COURSES FOR SAVE ON ENERGY INCENTIVES (CONTINUED)

Fundamentals and Advanced Management of Compressed Air Systems

- ✓ Individuals currently employed with an accountability for, or providing services for, energy management or building operations at a commercial, institutional or industrial facility, or facilities, in Ontario.
- ✓ Individuals who have two or more years of experience working in an environment as specified above, OR have one year of experience and one year of college-level education in a facility operations and maintenance-related program.
- ✓ Up to 50% or up to \$750 of course fees for eligible participants.
- ✓ Received upon the completion of training offered by Compressed Air Challenge.

High Performance Sustainable Buildings: HVAC Optimization

- ✓ Individuals currently employed with an accountability for, or providing services for, energy management or building operations at a commercial, institutional or industrial facility, or facilities, in Ontario.
- ✓ Individuals who have two or more years of experience working in an environment as specified above, OR have one year of experience and one year of college-level education in a facility operations and maintenance-related program.
- ✓ Up to 50% or up to \$750 of course fees for eligible participants.
- ✓ Received upon the completion of training offered by Building Owners and Managers Institute of Canada (BOMI).

Making the Case for Decarbonization Projects

- ✓ Individuals currently employed with an accountability for, or providing services for, energy management or building operations at a commercial, institutional or industrial facility, or facilities, in Ontario.
- ✓ Up to 50% or up to \$350 of course fees for eligible participants.
- ✓ Received upon the completion of training offered by Canadian Institute for Energy Training (CIET).

Measurement and Verification: Essentials and Advanced

- ✓ Individuals currently employed with an accountability for, or providing services for, energy management or building operations at a commercial, institutional or industrial facility, or facilities, in Ontario.
- ✓ Up to 50% or up to \$550 of course fees for eligible participants.
- ✓ Received upon the completion of training offered by Canadian Institute for Energy Training (CIET).

Performance Measurement and Verification Analyst (PMVA)

- ✓ Individuals currently employed to provide measurement and verification services for electricity conservation projects to commercial, institutional or industrial customers in Ontario.
- ✓ Up to 50% or up to \$1,400 of course fees for eligible participants.
- ✓ Received upon the successful completion of the Performance Measurement and Verification Analyst (PMVA) training and exam offered by Efficiency Valuation Organization (EVO).

Pump System Matter: Pump System Optimization

- ✓ Individuals currently employed with an accountability for, or providing services for, energy management or building operations at a commercial, institutional or industrial facility, or facilities, in Ontario.
- ✓ Individuals who have two or more years of experience working in an environment as specified above, OR have one year of experience and one year of college-level education in a facility operations and maintenance-related program.
- ✓ Up to 50% or up to \$750 of course fees for eligible participants.
- ✓ Received upon the completion of training offered by Hydraulic Institute.

RETScreen Expert Training

- ✓ Individuals currently employed with an accountability for, or providing services for, energy management or building operations at a commercial, institutional or industrial facility, or facilities, in Ontario.
- ✓ Up to 50% or up to \$900 per day for each workshop fee for eligible participants.
- ✓ Received upon the completion of training offered by Canadian Institute for Energy Training (CIET), TdS Dixon Inc. (KnowEnergy) or RER Energy Inc.

For a limited time, new RETScreen subscribers may receive a free one-year subscription to RETScreen Expert Professional mode.

SECTION 6: TRAINING COURSES FOR SAVE ON ENERGY/ENBRIDGE JOINT INCENTIVES

If you are an Enbridge Business or Industrial Customer, please select the training course(s) for which this Application is being submitted.

Each training course has specific criteria for eligibility. Please ensure that all requirements for each training selected have been read and that each Participant meets the requirements. Joint Incentives cover course, exam and/or certification fees only, and exclude taxes. For certainty, if any portion of the training course's fees is covered by other incentives, such amounts will not be eligible for reimbursement and will be excluded from the Joint Incentive calculation. All dollar amounts are in Canadian dollars. Please note that if you are eligible to receive a Joint Incentive you will not be eligible to receive a Save on Energy Incentive under Section 5 for the same training course.

Certified Energy Manager (CEM)

- ✓ Individuals currently employed with an accountability for providing services in building operations and maintenance or energy management of a large commercial, institutional or industrial facility in Ontario.
- ✓ Individuals who have two or more years of experience working in an environment as specified above, OR who have one year of experience and one year of college-level education in a facilities operations and maintenance-related program.
- ✓ Up to 75% or up to \$2,500 of course fees for eligible Enbridge customers.
- ✓ Received upon the successful completion of the Certified Energy Manager (CEM) training and exam offered by Canadian Institute for Energy Training (CIET) or Association of Energy Engineers (AEE).

Certified Sustainable Building Operator (CSBO)

- ✓ Individuals currently employed with an accountability for, or providing services for, energy management or building operations at a commercial, institutional or industrial facility, or facilities, in Ontario.
- ✓ Up to 75% or up to \$2,250 of course fees for eligible Enbridge customers.
- ✓ Received upon the successful completion of the Certified Sustainable Building Operator (CSBO) training and exam offered by Canadian Institute for Energy Training (CIET).

Dollars to \$ense Energy Management Workshops

- ✓ Individuals currently employed with an accountability for, or providing services for, energy management or building operations at a commercial, institutional or industrial facility, or facilities, in Ontario.
- ✓ Up to 75% or up to \$500 per day for any full-day standard or customized workshop for eligible Enbridge customers.
- ✓ Received upon the successful completion of a Dollars to \$ense workshop offered by Canadian Institute for Energy Training (CIET) or TdS Dixon Inc. (KnowEnergy).



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 course (the “training course”).

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, 2024, BUT MAY BE CANCELLED AT ANY TIME WITHOUT PRIOR NOTICE.

1. The Applicant confirms that no Save on Energy Incentive has been paid out to it or any Participant in respect of the Participant(s) for the training course(s) outlined in this Application.
2. The Applicant confirms that any costs already covered by or that will be covered by funding or grants funded by a governmental authority, whether administered by the IESO, a local electricity or gas distributor or any other party, or rebates from manufacturers, wholesalers or other supply chain participants will be disclosed to the IESO as part of its Application. For certainty, Applicant or Participant fees covered by other incentives are not eligible for reimbursement pursuant to this Agreement and will be excluded from the incentive calculation.
3. The Applicant confirms that it or a Participant has paid the invoice(s) attached to this Application for the training course(s) in full, less any costs as disclosed in Section 2.
4. The Applicant confirms that this Application is submitted within three (3) months of the Participant(s) completing the training course(s) or within six (6) months for training courses requiring proof of certification (i.e. CBCP, CEA, CEM, CMVP, CSBO and PMVA).
5. The Applicant confirms that any and all Participants were employed by the Applicant at time of training course participation, and continue to be full-time employees as of the date of Application submission.
6. 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.
7. Applicant and Participant(s) each confirm that all of the eligibility requirements for each training course selected have been met.
8. 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 training course(s) selected in the Application according to the Incentive amount up to the maximum limit in effect at the time of the Application submission.
9. 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 training course evaluation, verification, measurement or management.
10. 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 training course or the Application or the Agreement, and in connection with any reporting activities relating to the training course, which shall include, without limitation: (i) sharing of Information with Enbridge Gas Inc., 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 training course based on such surveys; and (iii) disclosure to the Ontario Energy Board, the Ontario Ministry of Energy or the Office of the Auditor General of Ontario or their respective successors; (b) each hereby consents to the disclosure by the IESO to local and gas 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 training course evaluation; and (c) each will indemnify and save harmless the IESO, Enbridge Gas Inc., their service providers and their 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 training course.
11. 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.
12. 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.
13. 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.
14. 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/Enbridge Joint Incentives only:

In addition to the above Terms and Conditions, the following Terms and Conditions apply for the Save on Energy/Enbridge Joint Incentives (“Joint Incentives”):

1. The Applicant must have an active Enbridge Gas Inc. (“Enbridge”) account in good standing.
2. If the IESO approves the Application, Enbridge will, subject to the terms and conditions of this Agreement and Application, and within 90 business days of the date IESO approves the Application, pay directly to the Applicant an Incentive for the training course(s) selected in the Application up to or equal to 30% of course fees up for Certified Energy Manager, Certified Sustainable Building Operator and Dollars to Sense.
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 of the date the IESO approves the Application, pay to the Applicant an Incentive for the training course(s) selected in the Application up to or equal to 45% of course fees for Certified Energy Manager, Certified Sustainable Building Operator and Dollars to Sense.
4. The Applicant consents to the IESO sharing Applicant information with Enbridge for the purposes of confirming the Enbridge account, submitting payment to the Applicant address, and contacting the Applicant in connection to the foregoing.
5. The Save on Energy/Enbridge Joint Incentive only applies for training courses completed between January 1, 2018 and December 31, 2024, and Applications must be submitted within three (3) months of the Participant(s) completing the Dollars to Sense training course or within six (6) months of the Participant(s) completing the Certified Energy Manager and Certified Sustainable Building Operator training courses, but in any event no later than January 31, 2025.
6. Enbridge reserves the right to reject an Application for any reason.