

## Section 1: APPLICATION INSTRUCTIONS

Please ensure that this Application is:

- completed by the Applicant in full with all applicable details
- signed by both the Applicant and all Participants
- submitted with all supporting documentation attached

**Incomplete Applications will not be considered or processed.**

Submit to [efficiency.training@ieso.ca](mailto: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 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

By checking this box, the Applicant (Organization/Employer) confirms that any and all Participants were employed by the Applicant at time of Initiative participation, and continue to be full-time employees as of the date written above.

## 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

Supporting documentation must be submitted with the completed Application to be considered and processed. Please check each box to confirm the required documentation is submitted to the IESO as part of 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 certificate, or equivalent document of Initiative completion provided by training and support provider

Multiple Participant Form(s)  
(only if applicable)

**Section 5: INITIATIVES**

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

Each Initiative has specific criteria for eligibility. Please check each box to confirm all requirements for each Initiative selected have been met. Training and Support Incentives cover course and/or certification fees only, and exclude taxes. All dollar amounts are in Canadian dollars.

**Building Operator Certification (BOC)**

IESO Training and Support Incentive covers 50% of course 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 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 has one year of experience AND one year of college level education in a facilities operations & maintenance-related program.

**Certified Energy Manager (CEM)**

IESO Training and Support Incentive covers 50% of course 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 certification.

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 has one year of experience AND one year of college level education in a facilities operations & maintenance-related program.

**Certified Measurement & Verification Professional (CMVP)**

IESO Training and Support Incentive covers 50% of course fees up to a maximum of \$1,100

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 certification.

The Participant is currently employed to provide measurement and verification services for electricity conservation projects to commercial, institutional or industrial customers in Ontario.

**Building Commissioning Professional Certification**

IESO Training and Support Incentive covers 50% of course 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 certification.

The Participant is currently employed to provide commissioning services for new or existing commercial, institutional or industrial facilities in Ontario.

**End-use Training**

IESO 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 energy management or building operations 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, OR has one year of experience AND one year of college level education in a facilities operations & maintenance-related program.

**Advanced Building Recommissioning**

IESO 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.

**RETScreen Expert Training**

IESO Training and Support Incentive covers 50% of course fees up to a maximum of \$800

The Participant completed the 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 energy management or building operations in commercial, institutional, or industrial facilities in Ontario.

*Optional*  
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.

**Dollars to \$ense Workshops**

The IESO 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").

The Participant is currently employed with an accountability for energy management or building operations in a commercial, institutional, or industrial facility in Ontario with a minimum of 50,000 sq. ft.

**Certified Energy Auditor**

The IESO Training and Support Incentive covers 50% of course fees up to a maximum of \$1100

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.

The Participant is currently employed to provide energy auditing services for new or existing commercial, institutional or industrial facilities in Ontario.

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## 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 and Participant(s) each confirm that they are either a resident of Ontario and/or operating in Ontario or conducting business in Ontario.
5. 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.
6. 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.
7. 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, 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.
8. 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](mailto:efficiency.training@ieso.ca).
9. Except as otherwise provided, the terms and conditions as outlined of 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.
10. 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.
11. 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.