

# Co-op Training Allowance Program Trade Ally Network (TAN) Supplemental Terms and Conditions



## Background

FortisBC may provide training funds (the "**Training Allowance**") to TAN Members, as a benefit supplemental to participation in the TAN Program, to assist in the promotion of education and training related to their natural gas and electric services (in the FortisBC electric territory only), as approved by the TAN Program and in accordance with the TAN Program Terms and Conditions as supplemented by these terms and conditions (the "**Supplemental Terms and Conditions**").

## Acknowledgment and declaration

Each TAN Member, by submitting the required deliverables for receipt of Training Allowance, agrees to participate in the Training Allowance Program and be bound by these Supplemental Terms and Conditions:

1. **Interpretation.** In these Supplemental Terms and Conditions, unless otherwise defined herein, capitalized words and expressions have the same meanings as are assigned to them in the TAN Program Terms and Conditions.

## 2. Eligibility and Approval

2.1 Eligibility. Each applicant must be an active TAN Member. The Training Allowance may only be used for technical training, workshops and classes related to the promotion and sales of high efficiency appliances, appliance safety, installation, best practices, or other courses related to energy efficient measures (the "**Training**").

2.2 The Training Allowance must meet the following requirements:

- a. All Training sessions must be pre-approved by FortisBC (see "Pre-approval Process" section below). Training sessions without prior approval on file will not be eligible to receive funding reimbursement.
- b. The Training must support the use of natural gas and/or electricity, as well as electrically and/or gas operated equipment, depending on the service provided by FortisBC in the Service area.
- c. Successful completion of the Training is mandatory. Where applicable, the contractor must achieve a passing grade.

2.3 Pre-Approval Process.

- a. TAN Members must receive pre-approval by FortisBC prior to attending the Training. Prior to registering for and/or attending the Training, the following must be submitted to, and approved by, FortisBC:
  - i. brief description of the Training session;
  - ii. the name of the Training provider;
  - iii. the names of employees who will be attending the Training;
  - iv. the location and date of the Training; and
  - v. the total cost of the Training before taxes.
- b. The Pre-approval Process documents must be delivered to [tradeallynetwork@fortisbc.com](mailto:tradeallynetwork@fortisbc.com) at least three (3) business days prior to proposed Training.
- c. After receiving approval, TAN Members may proceed to registering and paying for the pre-approved Training session.

## 3. Reimbursement.

3.1. Reimbursement Amount. FortisBC may provide reimbursement in the amount of fifty per cent (50%) of the pre-approved amount for Training ("**Training Allowance**") up to the maximum amount per TAN Member established by FortisBC annually. Travel, meals, lodging or other expenses are not included in the reimbursement. TAN Members who live in remote communities where training is not offered may apply to have 50 per cent (50%) of their travel and lodging costs (excluding taxes) pre-approved by FortisBC. Funding available for the Training is limited and will be dispersed to eligible TAN Members on a first-come, first served basis, based on the timing of receipt of all deliverables following completion of Training.

3.2. Request for Reimbursement.

- a. The following must be submitted electronically by the TAN Member to FortisBC (using [fortisbc.com/onlineforms](https://fortisbc.com/onlineforms)) to obtain Training Allowance:
  - i. the Training reimbursement claim form;
  - ii. a copy of FortisBC's pre-approval email;
  - iii. a copy of the invoice showing total Training sessions costs, along with a proof of payment in full, issued by Training

provider; and

- iv. proof of successful completion of the Training and, where applicable, proof that the contractor passed the Training. This may be in the form of a certificate of completion; letter from the course provider confirming successful completion; and any other form satisfactory to FortisBC, in its sole discretion.

- b. The request for reimbursement and supporting deliverables must be submitted by the TAN Member. Submissions by a third party will be rejected.
- c. TAN Member is responsible for paying all taxes associated with the Training.

3.3. Reimbursement Deadline. Requests for reimbursement must be submitted NO LATER THAN ninety (90) days after successful completion of the Training.

3.4. Only registered, active participants of the TAN Program are eligible for the Training Allowance. Cheques will not be made payable or mailed to a third party (such as an association training agent, etc.). Third parties cannot submit paperwork on behalf of a TAN Member.

3.5. Payment of Training Allowance. The Training Allowance will be paid by cheque addressed to the TAN Member or EFT deposit to the TAN Member, if the TAN Member is registered with FortisBC's accounts payable department. Training Allowance cannot be assigned. FortisBC is under no obligation to re-issue a cheque which has been returned as undeliverable or to replace a stale-dated cheque. TAN Member is responsible for any applicable tax on funding. Please allow six to eight weeks to receive the reimbursement payment.

4. **Rejection of requests.** FortisBC reserves the right, in its sole discretion, to reject requests for the Training Allowance which are incomplete, inaccurate, illegible or late, or do not meet all requirements, or which include an invoice not containing required details or which do not otherwise comply with these Supplemental Terms and Conditions. FortisBC is not responsible for late submissions. Documents and invoices submitted electronically are at the TAN Member's sole risk.

5. **TAN Program Terms and Conditions.** These Supplemental Terms and Conditions relate to specific rights and obligations applicable to the Training Allowance Program and are supplemental to, and must be read in conjunction with, the TAN Program Terms and Conditions. These Supplemental Terms and Conditions, together with the TAN Program Terms and Conditions apply and are in full force and effect with respect to, and during, the TAN Member's participation in the Training Allowance Program.

6. **Eligibility.** In no way limiting section 5 (TAN Program Terms and Conditions), the TAN Member must continue to meet the eligibility criteria of the TAN Program to receive the Training Allowance.

For more information, contact: Phone: 1-866-884-8833 (Option 3)

Email: [tradeallynetwork@fortisbc.com](mailto:tradeallynetwork@fortisbc.com)