PROGRAM GUIDE | APRIL 2026 - MARCH 2027

ENSPiRE

A BOMA Initiative

RETROFIT READY

ACCELERATING RETROFITS ACROSS CANADA

Original publication date: March 10, 2026

Funded by Natural Resources Canada's Deep Retrofit Accelerator Initiative

Canada

BOMA Canada

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Program Information

The BOMA Enspire Retrofit Ready initiative provides financial support to mid-tier commercial building owners and managers undertaking activities that improve building energy performance and prepare for deep retrofits.

The initiative offers funding across four activities:

1. Recommissioning and Building Optimization
2. Energy Monitoring and Tracking Systems
3. Business Case Development
4. Retrofit Coordinators

Initiative Duration: April 1, 2026 - March 26, 2027

Total Retrofit Ready Initiative Budget: $4,000,000

Funding: Between 60% - 80% of eligible pre-tax costs up to specified caps based on building size and activity type.

All funding amounts and caps referenced in this program guide are exclusive of applicable taxes. The program provides funding based on pre-tax costs, and participants are responsible for any applicable taxes (HST/GST) on the entire project cost prior to the incentive deduction.

The application for the Retrofit Ready initiative is completely online through the BOMA Enspire portal at bomaenspire.ca. Users must create a profile and successfully register their business and property to apply for funding opportunities.

IMPORTANT NOTE: The Retrofit Ready initiative funds noncapital professional and technical services that support retrofit implementation and readiness. Capital expenditures, including the purchase and installation of new equipment or systems, are not eligible for funding under the BOMA Enspire program.

BOMA Enspire is delivered by BOMA Canada with $24.9M funding from Natural Resources Canada (NRCan) under its Deep Retrofit Accelerator Initiative (DRAI).

Learn more about the DRAI program here

Learn more about BOMA Canada here

Eligibility Requirements

Eligibility Requirements

Participant Eligibility

Participants must fall under the following:

- Commercial or institutional building owners/managers
- Property management companies with owner authorization
- Have legal authority to make decisions for the building
- Must not be receiving DRAI funding for the same activities from other programs
- Agree to all terms and conditions of the program

Building Eligibility

Eligible buildings must comply with the following:

- Located in Canada
- Identify as a Class B or C commercial or institutional building
- Built before 2016
- Between 10,000 - 250,000 square feet in Gross Floor Area
- Connected to ENERGY STAR Portfolio Manager with 14+ months of the latest utility data

Note: Federal government owned and operated facilities are not eligible for funding under the BOMA Enspire Program.

Asset Types: The following privately owned or operated asset types are eligible, provided they meet the above criteria.

- Offices: Buildings used primarily for office space
- Enclosed Shopping Centres: Indoor retail facilities with multiple stores (entire facility must participate, not just one store in the building)
- Open-Air Retail: Shopping centers with store entrances facing outdoors
- Light Industrial: Warehouses, distribution centers, packing facilities and light manufacturing (i.e., warehouses, distribution hubs, packaging and assembly, small fabrication or finishing operations)
- Hotels and Lodging: Accommodation facilities with guest rooms
- Mixed-Use Commercial Properties: Buildings combining commercial uses (with at least 30% of gross floor area being used for commercial purposes), which may include office, retail, and residential components
- Restaurants: Food service establishments with dedicated facilities
- Municipal or provincially owned and operated small to medium buildings are eligible to receive funding, on a case-by-case basis

Eligibility Requirements

The following Asset Types are eligible if they meet the above criteria:

- Health Care Facilities: Hospitals, clinics, and medical office buildings
- Schools: K-12 and post-secondary educational facilities
- Recreation Facilities: Community centers, athletic facilities, YMCA/YWCA, sports complexes

Service Provider Eligibility

All funded activities must be completed by qualified service providers who:

1. Are enrolled in the BOMA Enspire Service Provider Directory
2. Meet the qualification requirements for their service category and for the eligible activity for which they are receiving funding
3. Are a separate entity from the applicant (building owner/property manager)

Applicant Responsibility

- Applicants must select service providers from the BOMA Enspire Service Provider Directory. **To learn more about enrolling into the BOMA Enspire Service Provider Directory, see Appendix A**
- If a preferred service provider is not listed, the applicant should direct the service provider to enroll into the directory before submitting the application
- The applicant must disclose any relationship with the service provider as part of the application process
- It is ultimately the applicant's responsibility to ensure that the work is completed by qualified professionals

BOMA Enspire encourages participants to conduct research, get multiple quotes, and exercise proper due diligence before awarding contracts.

Eligibility Requirements

Data Requirements:

ENERGY STAR Portfolio Manager (ESPM) property data access must be shared with BOMA Enspire **(account: bomaenspire)**

Minimum 14 months of recent and continuous energy consumption data in ESPM, including:

- Monthly electricity consumption (kWh)
- Monthly natural gas consumption (if applicable)
- Monthly water consumption (if applicable)

All data must:

- Include the most recent 14 consecutive months and not be older than October 2023

Building details including:

- Gross floor area
- Year built
- Operating hours
- Occupancy rates
- Building systems information

BOMA Canada reserves the right to verify utility data through utility bills or direct utility data access.

Funding Structure

Funding Structure

The BOMA Enspire Retrofit Ready initiative funds between 60-80% of eligible pre-tax costs up to the specified caps based on building size and activity.

In the Retrofit Ready initiative, funded by Natural Resources Canada, all payments must be issued directly to the service provider that was designated as the service provider on the application who completed the work. Unlike past BOMA Enspire programs, building owners or managers cannot receive these payments.

Applying Taxes Correctly

Applicants are responsible for paying all taxes on the services, even when funding covers up to 80% of eligible costs. NRCan requires that taxes be applied to the full, nonsubsidized value of the services, and requires proof of payment of 100% of the taxes along with the non-subsidized portion of the project cost. **For an example of a sufficient final invoice, please see Appendix C.**

The Retrofit Ready initiative will fund the following four activities:

1. Recommissioning and Building Optimization
2. Energy Monitoring and Tracking Systems
3. Business Case Development
4. Retrofit Coordinators

Funding Caps

This section outlines the maximum funding that can be received by a single building, by a building owner/property manager, or by a service provider.

Total funding received across this initiative and the previous BOMA Enspire initiatives (Quick Start Audit [QSA] and Building Performance Excellence [BPE]) cannot exceed the combined funding caps. If a building or portfolio has already received the maximum funding under past BOMA Enspire Initiatives (QSA/BPE), it is not eligible for Retrofit Ready. Buildings or portfolios that did not previously reach their cap may still receive additional funding. Funding is allocated on a first come, first served basis, and BOMA Enspire may revoke reserved funding if a project is unlikely to meet required deadlines.

Only successfully funded QSA/BPE projects count toward the total funding caps; previously ineligible applications do not. All past QSA/BPE participants will be notified of any remaining funding eligibility before the launch of the Retrofit Ready initiative. If you previously participated in QSA/BPE and want to confirm your remaining funding for a building, portfolio, or service provider organization, please contact our Support Centre at support@bomaenspire.ca.

Funding Structure

Funding Cap by Building Size Category

The total funding available for each building is dependent on the building size.

Participants can apply for more than one activity per building provided the total funding requested is within the combined project caps, as indicated below. Funding for multiple projects within the same building is not guaranteed.

Building Size Category	Square Footage Range	Combined Project Cap
Tier 1	10,000 – 50,000 sq ft	$75,000
Tier 2	50,001 – 100,000 sq ft	$100,000
Tier 3	100,001 – 250,000 sq ft	$125,000

Funding Cap by Building Owner/Property Manager Account

The maximum funding available per building owner or property manager account is $500,000 total across all their buildings and activities from the Retrofit Ready, QSA and BPE initiatives, that have been successfully funded.

Funding Cap by Service Provider

The maximum funding available to any single service provider is $2,000,000 in total across all applications from Retrofit Ready, QSA and BPE initiatives that have been successfully funded.

Program Budget and Allocation

The BOMA Enspire Retrofit Ready initiative has a total budget of $4,000,000. The allocation across the activities is as follows:

Activity	Activity Cap
Recommissioning and Building Optimization	$2,750,000
Energy Monitoring and Tracking Systems Business Case Development Retrofit Coordinators	$1,250,000

BOMA Enspire reserves the right to re-allocate funding to activities based on participants' needs.

Timeline &
Key Dates

Timeline &
Key Dates

Timeline & Key Dates

Milestone	Date
Initiative Launch	Wednesday, April 1, 2026
Pre-Project Application Deadline	Tuesday, December 1, 2026
Pre-Approval	BOMA will conduct technical reviews within 15 business days of receipt of completed application.
Mandatory Check-ins	Every 60 days after pre-approval until project completion.
Final Activity Completion Deadline	Friday, January 29, 2027
Post-Project Application Deadline*	Friday, February 12, 2027
Initiative End Date (All Payments Made)	Friday, March 26, 2027

* Post-Project Application Deadline is the last day by which to submit all post-applications through the BOMA Enspire portal. Any applications not submitted by this date will risk losing funding.

Applicants are responsible for ensuring their projects are completed on schedule and for submitting all required funding applications by the designated deadlines.

To closely monitor project progress, the BOMA Enspire Team will conduct mandatory check-ins every 60 days after your project has received pre-approval. **At each 60-day check-in, you must provide a brief status update that includes confirmation of your project's start date, an estimate of current progress, and confirmation that your project remains on track for completion by the proposed end date**. You may also need to provide evidence of forward progress on the activity, which may be requested by an Account Manager at any time.

You are required to respond to each 60-day check-in request within 10 business days. Failure to respond within this timeframe, or **if your project is determined by the BOMA Enspire Team to be off track, will result in your project being moved to the end of the waitlist. Please note: Placement on the waitlist means funding for your project is not guaranteed and will depend on available budget.**

In addition to the scheduled 60-day check-ins, the BOMA Enspire Team may reach out at any time during your application process to request evidence that your project is progressing as planned. Evidence of forward progress may include a signed work order, photos of commissioning work that is underway, project plans showing work progress, etc. You must respond to these requests within 10 business days to avoid your project being moved to the waitlist.

Finally, it is your responsibility to submit your post-project application by the stated deadline. After the post-project submission deadline (Friday, February 12, 2027) please respond to all information requests within 5 business days. A delayed response to information requests after this date may put your project at risk of losing funding.

Submission Requirements

Submission Requirements

Participant Obligations

- Maintain accurate records of all project activities and expenditures
- Provide additional documentation, photos, and/or access to the building for verification purposes, if requested
- Provide credentials of the service provider(s), if requested
- Share energy performance data for program evaluation
- Complete all funded activities by the specified deadlines
- Submit all required documentation within specified timeframes

Pre-Project Documentation Requirements

All applications must include the following pre-project documentation:

- Detailed scope of work for the activities requesting funding
- A cost estimate from the selected service provider
- An estimated timeline to complete the work and to submit the required post-project documentation

Additional documentation required at the pre-project application stage varies by activity.

For details, refer to the Pre-Project Documentation Requirements listed under each activity in the Eligible Project Activities and Funding section of this guide.

Post-Project Documentation Requirements

For all funded projects, across all activities, participants must submit the following items after project completion:

- Detailed invoice(s) from service provider(s)
- Proof of payment to the service provider in the amount not covered by the incentive, plus applicable taxes on the full project cost. Acceptable proof of payments are Bank Statements, proof of cashed cheque from building owner/manager
- All required post-application required documents, as shown under the activity list in the following section
- Where applicable and required, anticipated implementation schedule for selected measures

Additionally, each activity has its own post-project documentation requirements, outlined in the Eligible Project Activities and Funding section of this guide.

Payments

In the Retrofit Ready initiative, funding will **only** be paid to service providers directly, not to building owners or property managers. To commence the payment process, participants must submit their post-application documents which includes the service provider banking information. Payments will be made via electronic funds transfer (EFT). Service provider banking information can be provided in the following formats:

- void cheque
- bank letter with banking information

More details are found on page 40-42 of this guide.

Eligible Activities and Funding

Eligible Activities and Funding

Eligible Activities and Funding

This section provides an overview of the key aspects associated with each activity, including the maximum available funding for different building tiers, a detailed breakdown of eligible and ineligible costs, and both pre-project and post-project requirements. Additionally, it outlines the necessary quality assurance and quality control measures, specifying the desk and site-visit requirements to ensure successful project implementation and compliance.

Quality Assurance and Quality Control (QA/QC)

During the pre-approval or post-approval process, your application may require additional documentation for verification. This process is known as Quality Assurance and Quality Control (QA/QC). If your project is selected for QA/QC, the technical reviewer will notify you that the application has been selected for QA/QC and provide a list of requirements which must be responded to in order to satisfy the QA/QC inquiry. This may include additional documentation, interviews with staff involved in the project, and/or site visits to the discretion of the technical reviewer. QA/QC requests must be responded to within 5 business days; failure to respond to requests for QA/QC information could result in the application being waitlisted or cancelled. Time spent responding to QA/QC requests does not preclude the application from meeting the overall program submission timelines.

1. Recommissioning and Building Optimization

Recommissioning and Building Optimization activities fine-tune existing systems for peak performance, comfort, and efficiency. This work focuses on restoring and improving the performance of existing systems without capital investments — making it a cost-effective strategy for enhancing operations and reducing energy waste. The result is a smarter, more responsive building that performs better.

Recommissioning Stream Options

Participants may choose one of the following pathways within the Recommissioning Stream:

1. **Whole Building Recommissioning & Optimization**

A comprehensive, end-to-end recommissioning of the entire facility, addressing building wide systems to restore performance, improve comfort, and optimize energy use.

OR

2. **Systems-Based Recommissioning (up to three systems)**

   Participants may select any one, two, or all three of the following system specific recommissioning activities:

   - HVAC System Recommissioning
   - Controls / Building Automation System Recommissioning
   - Water-Side Energy System Recommissioning

This structure offers flexibility—allowing teams to undertake a full-building optimization when appropriate, or to target the specific systems that will deliver the greatest operational or energy performance benefit.

Service Provider Requirements for All Recommissioning Activities

All service providers that undertake Recommissioning Activities must have/adhere to the following requirements (note these are requirements of the person(s) conducting the work, not the overall company):

1. **Experience: ≥5 recommissioning projects in the last 5 years of similar size/complexity**

AND

2. **Certification (At least 1 of the following):**
    - Association of Energy Engineers (AEE) Certified Building Commissioning Professional (CBCP)
    - AEE Existing Building Commissioning Professional (EBCP)
    - NRCAN Advanced Recommissioning training and certification, delivered through the Canadian Institute for Energy Training (CIET)
    - American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) Building Commissioning Professional (BCxP)
    - Building Commissioning Association (BCxA) Certified Commissioning Professional or Certified Commissioning Firm (CCP or CCF)
    - Associated Air Balance Council (AABC) Commissioning Group (ACG) Certified Commissioning Authority (CxA) certification
    - National Environmental Balancing Bureau (NEBB) Commissioning Process Professional (CxPP)
    - Professional Engineer (P.Eng) licensed to practice in the same province as the project/ building

1.1 Whole Building Recommissioning & Optimization

Whole Building Recommissioning & Optimization is a comprehensive, facility wide process that evaluates and optimizes the performance of all major building systems together rather than as isolated components. It goes beyond simply combining HVAC, controls, and water-side recommissioning by examining how these systems interact, identifying cross-system issues, and ensuring the building operates efficiently and consistently as a cohesive whole.

This approach includes a full building-level investigation, performance verification, and optimization effort that establishes baseline performance, tests system functionality, and

1.1 Whole Building Recommissioning & Optimization

confirms improvements through documented post-implementation results. By taking a holistic view, Whole Building Recommissioning supports deeper operational improvements, better occupant comfort, and long-term, persistent energy savings across the entire facility.

a. Maximum Available Funding

Activity	Percentage of Eligible Costs	Tier 1 10,000 - 50,000 sq ft	Tier 2 50,001 - 100,000 sq. ft.	Tier 3 100,001 - 250,000 sq. ft.
Whole Building Recommissioning & Optimization	80%	Up to $20,000	Up to $30,000	Up to $40,000

b. Service Provider Requirements

- Please see section above: "Service Provider Requirements for All Recommissioning Activities"

c. Eligible and Ineligible Costs

Eligible Costs	Ineligible Costs
• Professional fees for qualified recommissioning that is directly attributable to the approved scope of work • Commissioning report • Performance testing and diagnostic activities • Controls programming and optimization • Documentation updates • Staff training related to optimized operations	• Major equipment replacements • Maintenance activities not related to energy performance • Administrative overhead • Software/hardware purchases • Parts and materials unrelated to optimization • Any sensors needed for recommissioning

d. Pre and Post Project Requirements

Pre-Project Requirements

- Building Condition Assessment (If Applicable)
- Building Audit Report (If done within the past 5 years)
- List of current operational issues or concerns
- Proposed project plan and scope, including:
  - Whole Building Systems Included: Identify all building systems—HVAC, lighting, water, envelope, and controls—that will be part of the recommissioning scope
  - Operational Issues Addressed: List the building-wide performance problems the project intends to resolve across all systems
  - Testing Activities Planned: Outline the diagnostic and functional tests to be conducted for all relevant building systems
  - Staff Training: Provide a plan to train on-site staff on updated systems, controls, and operating procedures resulting from whole-building recommissioning

Post-Project Requirements

- Final Invoice – Sample provided in Appendix C
- Proof of payment via bank statement, cashed cheque
- A complete checklist of implemented optimization measures as provided in Appendix B
- A comprehensive recommissioning report, including:
  - Baseline Building Performance: Document how the entire building's systems were operating before recommissioning
  - Testing Procedures & Results: Summarize all functional and diagnostic tests performed across building systems and their outcomes
  - Completed Recommissioning Activities: A list of all recommissioning activities/ optimization measures completed as a result of the diagnostic tests, and when they were completed.
  - Updated Energy Savings Estimates: Provide revised savings calculations for all implemented optimization measures
  - Post-Implementation Verification: Compare pre- vs. post-implementation data to confirm building level performance improvements. This must include evidence of implementation, such as building energy bills, sub-metering, spot measurements, BAS trend data, and/or photos of the pre -and post- conditions
  - Operations & Maintenance Recommendations: List ongoing building wide maintenance and operational actions needed to sustain performance improvements
  - Staff Training Documentation: Record of all training delivered to building staff covering updated systems, controls, and procedures, including dates, attendees, and topics covered (applicable where systems are managed in-house).

- Subscription Service Documentation: Where systems are managed through a third-party or subscription-based service rather than in-house, provide details of the service provider, scope of services, and active subscription or service arrangement.

e. Quality Assurance Quality Control (QA/QC) Requirements (if requested)

Virtual QA/QC Requirements	Site Visit QA/QC Requirements
• Photo evidence of implemented recommissioning measures • BAS screenshots and/or trend data to confirm energy savings • Virtual meeting with building owner and staff to review completed activities • Proof that staff training materials have been distributed to staff (if applicable) • Additional verification, as required	• In-person meeting with building owner and maintenance staff to review completed activities • Site walkthrough to see all implemented measures, including confirming equipment setpoint changes, valve positions, controls, BAS dashboards, and other items, as necessary • Additional verification, as required

f. Required Optimization Measures Checklist

Buildings applying for funding for Whole Building Recommissioning & Optimization must submit the checklist below as part of the post-project documentation. For each measure not implemented, a justification must be provided explaining why it was not applicable or feasible for the specific building. Checklist also found in Appendix B

Optimization Measure	Potential Energy Savings	Non-Energy Benefits	Implemented Yes/No	Findings & Results
Align equipment operating schedules with building occupancy	2%-4% reduction in space heating load per hour of night setback	Improved building control, reduced heating and cooling load, extended equipment life		
Optimize hydronic and air supply temperatures	5%-10% of energy use in a typical air handling unit	Improved occupant comfort, improved building control, extended equipment life		
Optimize ventilation and exhaust rates	Up to 70% reduction in conditioned outdoor air volume	Improved occupant comfort, improved building control, reduced heating and cooling load		

Optimization Measure	Potential Energy Savings	Non-Energy Benefits	Implemented Yes/No	Findings & Results
Diagnose and eliminate simultaneous heating and cooling	5%-25% of space conditioning energy depending on system type and severity	Improved occupant comfort, improved building control, reduced heating and cooling load		
Eliminate passing valves	5%-10% of energy use in a typical air handling unit	Improved building control, extended equipment life		
Eliminate unnecessary lighting use	10%-40% of building lighting energy	Reduced cooling load		
Implement seasonal disable for major equipment	2%-5% of annual system gas consumption	Extended equipment life		

1.2 HVAC System Recommissioning

HVAC System Recommissioning is the systematic process of evaluating, testing, and optimizing existing heating, ventilation, and air conditioning systems to ensure they operate as originally intended. It improves energy efficiency, occupant comfort, and system reliability by identifying and correcting performance issues that develop over time.

a. Maximum Available Funding

Activity	Percentage of Eligible Costs	Tier 1 10,000 - 50,000 sq ft	Tier 2 50,001 - 100,000 sq. ft.	Tier 3 100,001 - 250,000 sq. ft.
HVAC System Recommissioning	80%	Up to $5,000	Up to $7,500	Up to $10,000

b. Service Provider Requirements

- Please see section above: “Service Provider Requirements for All Recommissioning Activities”

c. Eligible and Ineligible Costs

Eligible Costs	Ineligible Costs
• Professional fees for qualified recommissioning providers • Commissioning report • Performance testing and diagnostic activities • Controls programming and optimization • Documentation updates • Staff training related to optimized operations	• Major equipment replacements • Maintenance activities not related to energy performance • Administrative overhead • Software/hardware • Parts and materials unrelated to optimization • Any sensors needed for recommissioning

d. Pre and Post Project Requirements

Pre-Project Requirements

- Building Condition Assessment (If Applicable)
- Building Audit Report (If done within the past 5 years)
- List of current operational Issues or concerns
- Proposed project plan and scope, including:
  - HVAC Systems Included: Identify all HVAC equipment and systems that will be part of the recommissioning scope
  - Operational Issues Identified: List the known HVAC performance problems the project intends to resolve
  - Testing Activities Planned: Outline the diagnostic and functional HVAC tests that will be conducted
  - Staff Training: Provide a plan to train building staff on updated systems, controls, and operating procedures resulting from whole-building recommissioning (applicable where systems are managed in-house).

Post-Project Requirements

- Final Invoice – Sample provided in Appendix C
- Proof of payment via bank statement, cashed cheque
- Comprehensive recommissioning report, including:
  - Baseline HVAC system performance: Document how the HVAC system was operating before recommissioning
  - Testing Procedures & Results: Summarize all functional and diagnostic HVAC tests performed and their outcomes

- Completed Recommissioning Activities: A list of all recommissioning activities/ optimization measures completed as a result of the diagnostic tests, and when they were completed.
- Updated Energy Savings Estimates: Provide revised savings calculations for implemented HVAC measures
- Post-Implementation Verification: Compare pre- vs. post-data to confirm HVAC performance improvements. This must include evidence of implementation, such as building energy bills, sub-metering, spot measurements, BAS trend data, and/or photos of the pre -and post- conditions
- Operation & Maintenance recommendations: List ongoing operations and maintenance actions needed to sustain HVAC
- Staff Training Documentation: Record all training provided to operators on updated HVAC systems, controls, and procedures, including dates, attendees, and topics covered (applicable where systems are managed in-house).
- Subscription Service Documentation: Where systems are managed through a third-party or subscription-based service rather than in-house, provide details of the service provider, scope of services, and active subscription or service arrangement.

e. Quality Assurance Quality Control (QA/QC) Requirements

Virtual QA/QC Requirements	Site Visit QA/QC Requirements
• Photo evidence of implemented HVAC optimization measures • BAS screenshots and/or trend data to confirm energy savings • Virtual meeting with building owner to review completed activities • Proof that staff training materials have been distributed to staff (if applicable) • Additional verification, as required	• In-person meeting with building owner and maintenance staff to review completed activities • Site walkthrough to see all implemented measures, including confirming equipment setpoint changes, damper positions, controls, BAS dashboards, and other items, as necessary • Additional verification, as required

1.3 Controls and Building Automation Systems Recommissioning

Controls and Building Automation Systems (BAS) Recommissioning is the process of reviewing, testing, and optimizing a building's control sequences, automation logic, and sensor-based functions to ensure the BAS is operating efficiently and responding correctly to real-time needs. This work typically includes refining equipment schedules, updating setpoints, optimizing ventilation and temperature control, calibrating sensors, and correcting issues such as simultaneous heating and cooling—measures shown in the program's mandatory optimization checklist. These tuning activities improve comfort, enhance system stability, and reduce unnecessary energy use by ensuring the BAS accurately coordinates how HVAC and other mechanical systems operate.

1.3 Controls and Buidling Automation Systems Recommissioning

a. Maximum Available Funding

Activity	Percentage of Eligible Costs	Tier 1 10,000 - 50,000 sq ft	Tier 2 50,001 - 100,000 sq. ft.	Tier 3 100,001 - 250,000 sq. ft.
Controls and Building Automation Systems Recommissioning	80%	Up to $5,000	Up to $7,500	Up to $10,000

b. Service Provider Requirements

- Please see section above: "Service Provider Requirements for All Recommissioning Activities"

c. Eligible and Ineligible Costs

Eligible Costs	Ineligible Costs
• Professional fees for qualified recommissioning providers • Commissioning report • Performance testing and diagnostic activities • Controls programming and optimization • Documentation updates • Staff training related to optimized operations	• Major equipment replacements • Maintenance activities not related to energy performance • Administrative overhead • Software/hardware purchases • Parts and materials unrelated to optimization • Any sensors needed for recommissioning

d. Pre and Post Project Requirements

Pre-Project Requirements

- Building Condition Assessment (If Applicable)
- Building Audit Report (If done within the past 5 years)
- List of current operational issues or concerns
- Proposed project plan and scope, including:
  - Systems & Controls to be Included: Identify the BAS systems, control loops, sensors, sequences, and equipment that will be reviewed and tuned
  - Existing Controls Issues to be Addressed: List the control issues requiring correction, such as faulty sensors, incorrect schedules, overrides, or inefficient sequences

- Planned Diagnostic & Functional Testing: Summarize the BAS tests to be performed, including sensor checks, sequence verification, alarm logic review, trend analysis, and control loop testing
- Required BAS Access & Data Collection Plan: Outline which BAS points, trend logs, and system data will be collected to support diagnostics and later verification
- Project Timeline & Sequencing: Provide the planned schedule for testing, programming, verification, and staff training, including any critical dependencies
- Staff Engagement & Training Needs: Identify the training that operators will receive to maintain system performance after tuning is complete (applicable where systems are managed in-house).

Post-Project Requirements

- Final Invoice – Sample provided in Appendix C
- Proof of payment via bank statement, cashed cheque
- Comprehensive recommissioning report, including:
  - Baseline System Performance: Document the pretuned BAS performance, including sequences, schedules, and key sensor readings
  - Testing Procedures & Results: Provide functional test results such as sequence validation, sensor verification, alarm logic tests, and trend analysis findings
  - Completed Recommissioning Activities: A list of all recommissioning activities/ optimization measures completed as a result of the diagnostic tests and when they were completed
  - Updated Energy Savings Estimates: Submit revised energy savings calculations that reflect the impact of the completed controls optimizations
  - Post Implementation Verification: Compare pre-vs-post data to confirm Controls and BAS performance improvements. This must include evidence of implementation, such as building energy bills, sub-metering, spot measurements, BAS trend data, and/or photos of the pre -and post- conditions
  - Operations & Maintenance Recommendations: Provide recommended ongoing actions for maintaining optimized BAS performance, such as sequence reviews, trend monitoring, and seasonal adjustments
  - Staff Training Documentation: Submit records confirming staff were trained on updated sequences, dashboards, scheduling processes, and optimized control strategies (applicable where systems are managed in-house)
  - Subscription Service Documentation: Where systems are managed through a third-party or subscription-based service rather than in-house, provide details of the service provider, scope of services, and active subscription or service arrangement
  - Documentation Updates: Provide updated BAS documentation including revised point lists, naming standards, sequence updates, and as-built BAS diagrams as applicable

e. Quality Assurance Quality Control (QA/QC) Requirements

Virtual QA/QC Requirements	Site Visit QA/QC Requirements
• Singular evidence of implemented measures • BAS screenshots and/or trend data to confirm energy savings • Virtual meeting with building owner to review completed activities • Proof that staff training materials have been distributed to staff (if applicable) • Additional verification, as required	• In-person meeting with building owner and maintenance staff to review completed activities • Site walkthrough to see all implemented measures, including confirming equipment setpoint changes, valve positions, controls, BAS dashboards, and other items, as necessary • Additional verification, as required

1.4 Water-Side Energy System Recommissioning

Water-Side Energy System Recommissioning is the targeted evaluation and optimization of an energy-consuming systems (such as domestic hot water, hydronic heating loops, chilled water systems, pumps, and distribution components) to ensure they operate efficiently, reliably, and in alignment with current facility needs. This process typically includes verifying baseline performance, testing system functionality, correcting flow or temperature issues, updating control settings, and identifying opportunities to reduce waste or improve system stability. By tuning and restoring proper operation of water-side systems, recommissioning helps reduce energy use associated with heating and cooling loads, improves occupant comfort, and supports long term equipment performance.

a. Maximum Available Funding

Activity	Percentage of Eligible Costs	Tier 1 10,000 - 50,000 sq ft	Tier 2 50,001 - 100,000 sq. ft.	Tier 3 100,001 - 250,000 sq. ft.
Water-Side Energy System Recommissioning	80%	Up to $5,000	Up to $7,500	Up to $10,000

b. Service Provider Requirements

- Please see section above: “Service Provider Requirements for All Recommissioning Activities”

c. Eligible and Ineligible Costs

Eligible Costs	Ineligible Costs
• Professional fees for qualified recommissioning providers • Commissioning report • Performance testing and diagnostic activities • Controls programming and optimization • Documentation updates • Staff training related to optimized operations	• Major equipment replacements • Maintenance activities not related to energy performance • Administrative overhead • Software/hardware purchases • Parts and materials unrelated to optimization • Any sensors needed for recommissioning

d. Pre and Post Project Requirements

Pre-Project Requirements

- Building Condition Assessment (If Applicable)
- Building or Water System Audit Report (If done within the past 5 years)
- List of current operational issues or concerns
- Proposed project plan and scope, including:
  - Baseline Water System Performance: Summarize how each water-side energy system was operating before recommissioning, including relevant flows, temperatures, pressures, pump performance, setpoints, and any inefficiencies
  - System Inventory & Configuration: Provide an inventory of all major water system components such as domestic hot water, hydronic and chilled loops, pumps, valves, heat exchangers, expansion tanks, and distribution piping
  - Testing Procedures & Results: Provide a list of proposed verification tests, including temperature/pressure checks, flow balancing, pump and valve testing, and control sequence verification
  - Staff Engagement & Training Needs: Identify the training that operators will receive to maintain system performance after tuning is complete (applicable where systems are managed in-house)

Post-Project Requirements

- Final Invoice – Sample provided in Appendix C
- Proof of payment via bank statement, cashed cheque
- Comprehensive recommissioning report, including:
  - Optimization Measures Implemented: Document all corrective actions taken, such as calibration, valve repair, pump adjustments, balancing, setpoint corrections, and control or flow optimization

- Updated Savings Estimates: Provide revised estimates of energy savings resulting from the implemented improvements
- Post Implementation Verification Data: Include before and after data demonstrating improvements in flow, temperature stability, energy consumption, and overall system responsiveness. This must include evidence of implementation, such as building energy bills, sub-metering, spot measurements, BAS trend data. Photos of the pre -and post- conditions
- Operations & Maintenance Recommendations: List ongoing water-side energy system maintenance and operational actions needed to sustain performance gains
- Staff Training Summary: Record of all training delivered to building staff covering updated systems, controls, and procedures, including dates, attendees, and topics covered (applicable where systems are managed in-house)
- Subscription Service Documentation: Where systems are managed through a third-party or subscription-based service rather than in-house, provide details of the service provider, scope of services, and active subscription or service arrangement

e. Quality Assurance Quality Control (QA/QC) Requirements

Virtual QA/QC Requirements	Site Visit QA/QC Requirements
• Photos evidence of implemented measures • BAS screenshots and/or trend data to confirm energy savings • Virtual meeting with building owner to review completed activities • Proof that staff training materials have been distributed to staff (if applicable) • Additional verification, as required	• In-person meeting with building owner and maintenance staff to review completed activities • Site walkthrough to see all implemented measures, including confirming equipment setpoint changes, valve positions, controls, BAS dashboards, and other items, as necessary • Additional verification, as required

2. Monitoring and Tracking Systems: Setup & Configuration

This activity provides real-time visibility into how your buildings consume energy and where improvements can be made. You can set up advanced monitoring, submetering, and analytics systems to shift from reactive maintenance to proactive energy management. These systems will help you make data-driven decisions that enhance performance, comfort, and sustainability.

2. Monitoring and Tracking Systems: Set-up & Configuration

a. Maximum Available Funding

Activity	Percentage of Eligible Costs	Tier 1 10,000 - 50,000 sq ft	Tier 2 50,001 - 100,000 sq. ft.	Tier 3 100,001 - 250,000 sq. ft.
Monitoring and Tracking Systems: Setup & Configuration	60%	Up to $15,000	Up to $20,000	Up to $25,000

b. Service Provider Requirements

- Experience: At least 5 EMS/BMS projects of similar size/complexity implemented in the last 5 years

c. Eligible and Ineligible Costs

Eligible Costs	Ineligible Costs
• Professional fees for system design and implementation • Installation and integration services • Configuration and programming • User training and documentation	• Capital costs for permanent energy monitoring hardware (meters, sensors, controllers etc.) • Permanent submetering equipment • Subscription fees • General IT infrastructure upgrades • Replacement of existing monitoring equipment • Administrative overhead • Expenses related to general building maintenance

d. Pre and Post Project Requirements

Pre-Project Requirements

- Proposed project plan and scope, including:
  - Current Monitoring Capabilities Assessment: Provide a summary of the building's existing monitoring systems, including what data is currently captured, which meters/sensors exist, any gaps, and whether equipment is functional or requires upgrades
  - Proposed Monitoring Points & System Architecture: Outline the points to be monitored, the planned sensor/meter locations, data flow structure, and the proposed EMS/BMS architecture (dashboards, data layers, analytics tools)
  - Integration Plan with Existing Systems: Describe how the new monitoring components will interface with current BAS/EMS, submeters, controllers, or third party platforms, including communication protocols and required configuration.
  - Implementation Timeline: Provide a clear schedule covering system setup steps including verification, procurement, installation, commissioning, configuration, testing, dashboard setup, and staff orientation

- Equipment Specifications: List all required hardware and software—including sensors, meters, data loggers, gateways, network requirements, accuracy standards, calibration needs, and EMS/BMS modules

Post-Project Requirements

- Final Invoice – Sample provided in Appendix C
- Proof of payment via bank statement, cashed cheque
- Comprehensive monitoring & tracking report, including:
  - System Design Documentation: Provide the final system design package, including diagrams, data flow maps, sensor/meter layouts, network paths, hardware locations, and any deviations from the original plan
  - System Architecture & Integration Details: Submit a technical summary describing how the monitoring system was integrated with existing BAS/EMS platforms, including communication protocols, point mapping, addressing, APIs, and verification that components communicate correctly. Confirm that all proposed data sources are live and communicating
  - User Access & Dashboard Screenshots: Include screenshots of dashboards and user interfaces showing access to real-time data, trends, alarms, analytics, reporting views, and confirmation that user permissions were properly configured
  - Training Materials & Records: Provide all training materials—guides, quick start documents, slide decks, videos—and records of who was trained and what topics were covered
  - Data Management & Reporting Procedures: Document how data will be stored, validated, trended, backed up, exported, and reported, including retention schedules, naming conventions, roles/responsibilities, alert handling, and any automated reporting workflows

e. Quality Assurance Quality Control (QA/QC) Requirements

Virtual QA/QC Requirements	Site Visit QA/QC Requirements
• Review of final point list, data mapping, and tag structure • Validation of sample data exports or trend views • Review of dashboard screenshots with timestamps • Photos of installed monitoring hardware, as applicable • Confirmation of staff access to systems • Proof that staff training materials have been distributed to staff (if applicable) • Additional verification, as required	• Live review of dashboards and data in the monitoring platform • On-site verification of installed meters or sensors • Confirmation that monitoring data aligns with observed equipment operation • In-person discussion with building operations staff regarding how monitoring data is being used • Additional verification, as required

3. Business Case Development

This activity supports you in making the financial case for energy and decarbonization retrofits. With expert analysis and support, you can confidently evaluate costs, benefits, risks, and returns to easily move from concept to commitment. BOMA Enspire wants you to have the financial and strategic insights needed to secure internal approvals, attract funding, and ensure long-term value.

To be eligible, the retrofit projects involved in the business case must have a total project value of at least $100,000 before taxes.

a. Maximum Available Funding

Activity	Percentage of Eligible Costs	Tier 1 10,000 - 50,000 sq ft	Tier 2 50,001 - 100,000 sq. ft.	Tier 3 100,001 - 250,000 sq. ft.
Business Case Development	60%	Up to $5,000	Up to $5,000	Up to $5,000

b. Service Provider Requirements

- Credentials: Certified Energy Manager (CEM), Professional Engineer (P.Eng), or equivalent technical background

OR

- Chartered Professional Accountant (CPA), Chartered Business Valuator (CBV) or equivalent energy finance experience

AND

- Experience: ≥3 capital retrofit business cases with implementation decisions in last 5 years

c. Eligible and Ineligible Costs

Eligible Costs	Ineligible Costs
• Financial modeling and analysis • Business case development • Research and analysis specific to the capital project	• General business planning not specific to energy retrofits • Corporate financial planning • Regular accounting services • Administrative overhead • Staff time for regular financial operations

d. Pre and Post Project Requirements

Pre-Project Requirements

- Building Condition Assessment (If Applicable)

- Building Audit Report (If done within the past 5 years)
- Proposed project plan and scope, including:
  - Specific Retrofit Opportunities to Be Analyzed: Provide a clear list of the energy or GHG reducing retrofit measures to be evaluated so the analysis focuses on defined, actionable upgrade options
  - Decision Context: Provide rationale from the building owner on why they have selected these retrofit energy efficiency measures to investigate further
  - Estimated Energy Savings: Submit initial savings estimates for each proposed measure using available audit data, benchmarking, engineering assumptions, or past project results
  - Financial Metrics to be Evaluated: Identify the financial metrics that will be used in the business case—such as lifecycle cost, ROI, payback, NPV, cost benefit ratio, or GHG reduction value—to guide comparison and justification of the retrofit options

Post-Project Requirements

- Final Invoice – Sample provided in Appendix C
- Proof of payment via bank statement, cashed cheque
- Presentation Details: Indicate how the business case was presented to decision makers, including meeting attendance list, date, and the format of the presentation, as applicable.
- Comprehensive business case report, including:
  - Executive Summary: Provide an overview of the problem, proposed upgrade, expected benefits, financial metrics, and recommended next steps
  - Background & Current State Assessment: Describe the existing system's condition, performance issues, and baseline data that justify the need for improvement
  - Problem Definition: Clearly state the operational, financial, regulatory, or strategic drivers that make the upgrade necessary
  - Project Options & Technical Analysis: Summarize the feasible upgrade options and compare their technical merits
  - Baseline vs. Upgrade Performance Analysis: Highlight the expected performance improvements and estimated energy and cost savings relative to the current state
  - Financial Analysis: Present projected costs, savings, incentives, and return on investment metrics for the proposed upgrade
  - Carbon & Sustainability Impacts: Quantify how the upgrade will reduce emissions and support sustainability or ESG goals
  - Risk Assessment: Identify key technical, financial, operational, and schedule risks along with mitigation strategies

- Implementation Plan & Schedule: Outline the major steps, timelines, and dependencies for delivering the upgrade
- Stakeholder Roles & Responsibilities: Define who will be responsible for approving, managing, executing, and supporting the project
- Recommendation: Conclude with the preferred option and why it provides the best overall value

e. Quality Assurance Quality Control (QA/QC) Requirements

Virtual QA/QC Requirements	Site Visit QA/QC Requirements
• Review financial modelling calculations and assumptions • Evidence of current project conditions, including photos, BAS screenshots, trend data, or other information as needed • Virtual meeting with building decision makers to confirm project details • Review details of proposed project • Additional verification, as required	• In-person meeting with building owner to discuss business case • Site walkthrough (if required) to validate level assumptions used in the analysis (e.g., system type, space constraints, operational schedules) • Additional verification, as required

4. Retrofit Coordinators

This activity provides comprehensive support to effectively plan, coordinate, and oversee energy efficiency or decarbonization projects—ranging from single-measure upgrades to complex, multi-system deep retrofits. By funding professional project management and specialized expertise, this activity helps energy and carbon reduction projects to be delivered on time, on budget, and with minimal disruption.

To be eligible, retrofit projects must have a total project value of at least $100,000 before tax and the Retrofit Coordinator must be an additional, dedicated hire, brought on specifically to manage and support this project, not a resource already performing the retrofit work. Implementation of the retrofit project must be completed prior to post-application submission.

a. Maximum Available Funding

Activity	Percentage of Eligible Costs	Tier 1 10,000 - 50,000 sq ft	Tier 2 50,001 - 100,000 sq. ft.	Tier 3 100,001 - 250,000 sq. ft.
Retrofit Project Coordination	60%	Up to $15,000	Up to $15,000	Up to $15,000

b. Service Provider Requirements

- Credentials: Certified Energy Manager (CEM), Professional Engineer (P.Eng), Project Management Professional (PMP) or equivalent technical background
- AND demonstrated experience with 5+ similar projects in last 5 years

c. Eligible and Ineligible Costs

Eligible Costs	Ineligible Costs
• Professional project management and technical consultation/advisory services • Retrofit project coordination, planning and scheduling, risk assessment, integration planning for building systems, and phased implementation strategies • Staff training for energy accountability and reduction	• Permanent staff salaries • General operations management • Administrative overhead • Employee benefits for permanent staff • Regular business operations costs

d. Pre and Post Project Requirements

Pre-Project Requirements

- Proposed project plan and scope, including:
  - Project Scope, Schedule, Budget & Technical Documentation: Provide the scope, basic schedule, budget, and supporting technical documents (e.g. drawings, specifications, equipment lists, etc.) of the Retrofit Project(s) for which the Retrofit Coordinator will be supporting.
  - Coordinator Scope of Work (SoW): Define the coordinator's responsibilities in support of the Retrofit Project(s) implementation. Responsibilities may include planning, scheduling, integration, documentation management, technical coordination, risk tracking, QA/QC, and stakeholder engagement. Sample SoW found in Appendix E

Post-Project Requirements

- Final Invoice – Sample provided in Appendix D
- Proof of payment via bank statement, cashed cheque
- Comprehensive retrofit coordinator details, including:
  - Coordinator Scope of Work (SOW): Provide the retrofit coordination summary, which describes completed work, status of retrofit implementation, key decisions and outcomes.
  - Proof of Project Completion: Provide evidence that the project was completed and is delivering energy savings through photos and/or data logging

e. Quality Assurance Quality Control (QA/QC) Requirements

Virtual QA/QC Requirements	Site Visit QA/QC Requirements
• Confirm implementation schedules and progress with retrofit coordinator • Review photos and other documentation for implemented measures • Virtual interview with retrofit coordinator to confirm scope and activities • Review proof the retrofit coordinator was hired, such as contracts and scope of work documents • Review evidence of retrofit coordination, such as project schedules, meeting agendas and minutes, risk logs, and communication with service providers and internal stakeholders • Additional verification, as required	• In-person meeting with building owner to discuss project and retrofit coordinator contributions • In-person meeting with retrofit coordinator to discuss the project details • Site walkthrough to verify details of project and confirm it was installed and is delivering energy savings • Interview with other site staff to confirm retrofit coordinator scope • Additional verification, as required

Application Process

Application Process

The application process for the BOMA Enspire Retrofit Ready initiative has several stages, with specific statuses to track your progress. All applications are managed through the online portal at bomaenspire.ca

Pre-Project Stage

This initial stage establishes your project's eligibility and scope before work begins.

1. Begin Your Application

- Log in to your account at bomaenspire.ca
- Application Draft
- Select a building that's Eligible for Funding from the list of your registered properties and enter the project details
- Select a service provider enlisted within the BOMA Enspire Service Provider Directory
- Save your progress at any time to continue later

2. Complete Required Documentation

Upload the required pre-project documentation:

- Proof of building ownership if not publicly available online
- Detailed scope of work for each proposed activity
- Cost estimate from the selected service provider
- Previous energy audit reports or Building Condition Assessment (if applicable)

3. Submit Application for Review

- Review all information for accuracy and completeness
- Submit your application. Status changes to "Application Draft Submitted"

4. Funding Availability Check

When your application is submitted, the BOMA Enspire team will check the available funding for your selected activity.

If funding for the selected activity is available, the review process begins. Status changes to "Application Draft Under Review".

If funding for the selected activity has been fully allocated:

- Your application status will be changed to “Application Waitlisted”
- An email notification will be sent to the account owner that the application has been waitlisted
- The application will maintain this status until funding becomes available
- If funding becomes available, your application will proceed to “Application Draft Under Review” and an email notification will be sent to the account owner

5. Application Review Process

- Technical review is conducted within 15 business days of receipt of completed application
- If additional information is needed, status changes to “Application Information Requested”
- An email notification with specific information requests will be sent to the account owner
- Submit requested information to continue the review process

6. Review Outcomes

- If the application meets program requirements, status changes to “Pre-Approval” stage
- If the application does not meet program requirements, status changes to “Ineligible for Funding” with an explanation

Pre-Approval Stage

This stage confirms the funding reservation for your project.

1. Application Approval

- Status changes to “Application Draft Approved”
- A notification will be sent via email, alerting the applicant that the Draft has been approved
- Review any approval notes, and amount of pre-approved earmarked fund
- Accept the pre-approval amount by signing the Participant Acceptance Terms & Conditions
- Status changes to “Application Submitted”

2. Funding Reservation

- Pre-approval notification issued with approved funding amount
- **You must sign the Participant Acceptance Terms & Conditions and accept your funding reservation within 10 business days of receiving pre-approval notice**
- Funding for your project is reserved upon completion of your Participant Acceptance
- Once the Participant Acceptance is signed, you may proceed with project activities
- Projects **must be started within 60 calendar days** of signing Participant Acceptance or risk losing funding
- Funding is reserved for your project until your post-project documentation is submitted, pending positive updates of progression at each 60 day mandatory check in. The final date to complete your project activity(ies) is January 29, 2027. The final date to submit your post-project documentation is February 12, 2027

Project Implementation

- Execute project activities with approved service providers
- Document work performed according to the required deliverables
- Collect all necessary post-project documentation

Follow-up Process

The BOMA Enspire team will contact participants to check on project progress and ensure timely completion. This may include follow-up emails or calls to the Project Contact as specified within the application and/or the Service Provider to confirm project start dates and implementation status. Participants are expected to respond within 10 business days to these follow-up communications.

Post-Project Stage

This stage records the completion of your project.

1. Post-Project Submission

- Access your approved application and select “Submit Post-Project Application”
- Status changes to “Post-Project Application Draft”
- Complete post-project form in the portal
- Upload all required post-project documentation:
  a. Detailed invoice(s) from service provider(s)
  b. Proof of payment
  c. Final reports and deliverables for each activity

- Provide payee information for the service provider. Under the Retrofit Ready Initiative, funding is paid directly to the service provider who completed the eligible activities. If you give your service provider access to update the application on your behalf, they will be able to edit and update their Payee Information.
- Submit application. Status changes to "Post-Project Application Submitted"

2. Post-Project Review

- When your submitted application is under review, the status changes to "Post-Project Application Under Review"
  - If the application **meets all requirements**, the application advances to the Payment stage and the status changes to "Funding Recommended"
  - If **additional information is needed**, the status changes to "Post-Project Application Information Requested"
  - If the application **does not meet requirements**, the status changes to "Post-Project Ineligible for Funding" accompanied by an explanation

Payment Stage

This stage processes the payment to your service provider for completed and verified activities. Under the Retrofit Ready initiative, funding is paid directly to the service provider.

1. Payee Information Review

- Since payee details for the service provider are collected during the post-project submission, the status moves directly to "Payee Details Submitted" after the "Funding Recommended" stage
- Payee information is reviewed. Status changes to "Payee Details In Review"
  - If changes are needed, status changes to "Revise Payee Details"
- Once approved, status changes to "Payee Details Approved"

2. Payment Processing

- Once the Payee details have been approved, the entire claim is reviewed one final time. Status changes to "Funding Claim Approval Pending"
- Upon final approval, status changes to "Funding Claim Approved"
- Payment is processed and status changes to "Funding Claim Payment in Progress"
- Payment issued via electronic funds transfer (EFT) to the service provider. Status: "Funding Claim Payment Completed"
- Confirmation email with payment details is sent to the account owner.

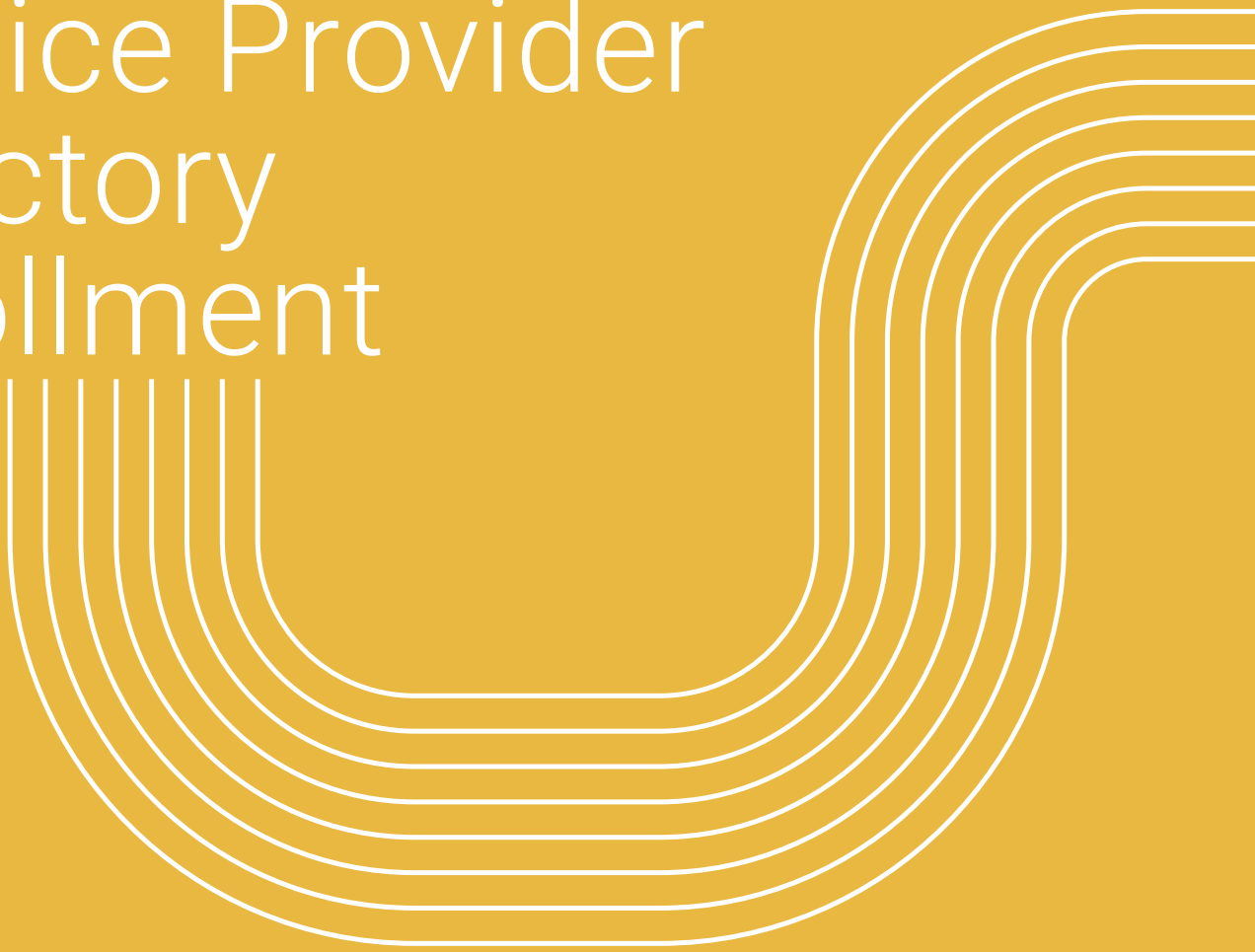
Application Status Monitoring

Throughout the entire process, you can monitor your application status through your online account dashboard at bomaenspire.ca. Email notifications about status changes and required actions will be sent to the account owner.

Terms and Conditions

Participation in the Retrofit Ready Program is subject to the Program Terms and Conditions, which are incorporated by reference and available at: https://bomaenspire.ca/rri/terms-and-conditions. Applicants are responsible for reviewing and complying with the current Terms and Conditions.

Appendix A
Service Provider Directory Enrollment



Appendix A
Service Provider Directory Enrollment

Definitions

All funded activities must be completed by qualified service providers who:

1. **Are enrolled in the BOMA Enspire Service Provider Directory**
2. **Meet the qualification requirements for their specific service category**
3. **Are a separate entity from the applicant (building owner/property manager)**

Enrollment is voluntary, free, and completed online at bomaenspire.ca/service-providers

The enrollment process requires:

- Completing a brief qualification questionnaire
- Agreeing & abiding by the BOMA Enspire Service Provider Code of Conduct
- Agreeing to the program terms and declarations
- Listing service categories and geographic areas served
- Providing proof of qualifications and insurance, as requested

If you require assistance to enroll into the BOMA Enspire Service Provider Directory, please contact us by phone at 1-877-BOMA(2662)-511 or by email at support@bomaenspire.ca

Appendix B
Mandatory Optimization Measures Checklist

Appendix B
Mandatory Optimization Measures Checklist

Mandatory Optimization Measures Checklist

Buildings applying for funding for recommissioning implementation must submit this checklist as part of the post-project documentation. For each measure not implemented, a justification must be provided explaining why it was not applicable or feasible for the specific building

Optimization Measure	Potential Energy Savings	Non-Energy Benefits	Implemented Yes/No	Findings & Results
Align equipment operating schedules with building occupancy	2%-4% reduction in space heating load per hour of night setback	Improved building control, reduced heating and cooling load, extended equipment life		
Optimize hydronic and air supply temperatures	5%-10% of energy use in a typical air handling unit	Improved occupant comfort, improved building control, extended equipment life		
Optimize ventilation and exhaust rates	Up to 70% reduction in conditioned outdoor air volume	Improved occupant comfort, improved building control, reduced heating and cooling load		
Diagnose and eliminate simultaneous heating and cooling	5%-25% of space conditioning energy depending on system type and severity	Improved occupant comfort, improved building control, reduced heating and cooling load		
Eliminate passing valves	5%-10% of energy use in a typical air handling unit	Improved building control, extended equipment life		
Eliminate unnecessary lighting use	10%-40% of building lighting energy	Reduced cooling load		
Implement seasonal disable for major equipment	2%-5% of annual system gas consumption	Extended equipment life		

Appendix C
Sample
Paid In
Full Invoice

Appendix C

Sample

Paid In Full

Invoice

Company Name

Company slogan

Street Address
City, ST ZIP Code
Phone Enter phone | Fax Enter fax
Email | Website

Sample Invoice

INVOICE # Invoice No
DATE Enter date

FOR Project or service description
P.O. # P.O. #

TO
Name
Company Name
Street Address
City, ST ZIP Code
Phone Enter phone | Email

Description	Amount
Recommissioning – Whole Building	$20,000
HST – 13%	$2,600
Invoice Subtotal	$22,600
Recommissioning - Whole Building - BOMA Enspire Funding	-$16,000
Total Owed	**$6,600**

Make all checks payable to Company Name
Payment is due within 30 days.
If you have any questions concerning this invoice, contact Name | Phone | Email

Thank you for your business!

PAID IN FULL

Appendix D
Sample Scope of Work – Retrofit Coordinator

Appendix D

Sample Scope of Work – Retrofit Coordinator

Sample Scope of Work – Retrofit Coordinator

Purpose

The Retrofit Coordinator will help guide your building's retrofit project from planning through completion. Their role is to keep the project organized, coordinated, and moving forward, ensuring work is delivered as planned and aligned with program requirements.

The Retrofit Coordinator does not install equipment or perform construction.

What the Retrofit Coordinator Will Do

1. Project Planning & Setup

- Review existing building information (audits, studies, drawings, prior recommendations).
- Confirm project goals, scope, and success criteria with the building owner or manager.
- Develop a clear project plan, including key milestones and timelines, roles and responsibilities, dependencies between activities, identify potential risks and help plan how to manage them.

2. Project Coordination

- Act as the main point of contact between building ownership/management, service providers and consultants and internal building staff
- Coordinate schedules and sequencing of retrofit activities
- Organize and participate in regular check ins or coordination meetings
- Track progress and flag issues early so they can be addressed

3. Technical Oversight & Quality Support

- Review technical documents and deliverables provided by service providers.
- Help confirm that retrofit measures are implemented as intended, using photos, BAS screenshots or trend data (where applicable), functional summaries provided by service providers

4. Documentation & Reporting

- Maintain project records, including schedules and updates, meeting notes and risk and issue logs
- Prepare a retrofit coordination summary, describing complete work, status of retrofit implementation, key decisions and outcomes

5. Stakeholder Support & Knowledge Transfer

- Help translate technical information into clear, owner friendly language.
- Participate in walkthroughs or meetings with building staff as needed.
- Support hand off of project knowledge to building operations staff.