

## Custom Application

### Does your facility qualify?

- Privately-owned, non-residential facility (public facilities are eligible through the Illinois Energy Now program; visit [www.illinoisenergy.org](http://www.illinoisenergy.org) for details)
- Electric delivery service rate DS2, DS3, DS4, DS5, or DS6 and Rider EDR surcharge on Ameren Illinois bill for all electric projects (should discuss with Ameren Illinois' representatives prior to starting)
- Gas delivery service rate GS2, GS3, GS4, or GS5 and Rider GDR surcharge on Ameren Illinois bill for all gas projects

### Does your project qualify?

- Electric or gas energy efficiency measures not incentivized under the Standard or Retro-commissioning Programs (Lighting, HVAC, VFD, Specialty)
- Installing new, energy efficient equipment
- New equipment meets eligibility guidelines as specified in this application
- Estimated project completion date is on or after June 1, 2016, and by May 31, 2017 (please contact a program representative if the project is estimated to extend into the next program year)
- Incentive for electric projects – \$0.06/kWh saved/year
- Incentive for gas projects - \$0.90/therm saved/year

### What you should know before beginning:

- Preapproval is **required** for ALL Custom projects. Do not purchase (including generating purchase orders) new equipment until receiving an official preapproval letter.
- Incentive requests greater than \$100,000 must submit a corporate letter of commitment with 30 days of receiving a preapproval letter and also submit an executed purchase order for project equipment within 60 days.
- Stockpiles of equipment are not allowed: all incentivized material must be installed and operational.
- Final application paperwork is due within 30 days of project completion.
- Electric projects are capped at \$500,000.
- Gas projects are capped at \$250,000.
- Custom incentive payments are capped at 50% of the customer's incremental cost to purchase energy efficiency measures, or the preapproved amount, whichever is less.
- Incentive calculations **for Custom HVAC projects** will be based upon realistic/submitted energy savings, but will be capped if the incentive exceeds  $\$0.015 * \text{annual kWh usage} + \$0.25 * \text{annual therm usage}$ . A completed [supplemental calculator](#) must be submitted with the Custom application.
- Application paperwork can be submitted via email or hard copy. Emails that include "zip" files cannot be received. You will receive a confirmation email within two business days of submitting an application; please contact us if you do not receive a confirmation email.

### Participation instructions:

- **Step One:** Submit your application for preapproval as directed within this application form. Do not purchase any material or generate purchase orders until a preapproval letter is issued. You will be notified if a pre-inspection is required.
- **Step Two:** Upon receipt of the preapproval letter, purchase and install the approved equipment. **NOTE:** if you are considering changes to the scope of work, it is **imperative** to contact a program representative to discuss how the change will impact your savings/incentive and the necessary steps required to request incentive changes.
- **Step Three:** Within 30 days of project completion (all equipment installed and operational), submit a completed Incentive Payment Request form and all supporting documentation requested. Applications are reviewed and approved projects paid within 60 days of approval.
- **Step Four:** Program staff may conduct a post installation verification inspection upon receiving final application paperwork.

\*Detailed, step-by-step instructions, FAQs, and other helpful information are available in the Application Guide ([www.ActOnenergy.com/portals/0/business/forms/application-guide.pdf](http://www.ActOnenergy.com/portals/0/business/forms/application-guide.pdf)).

# Custom Application

## Customer and Project Information

*Red indicates a required field.*

Ameren Illinois Customer Information			
Company Name	Signed W-9 form is required documentation <a href="#">Click here for a blank W-9 form</a>	Ameren Illinois Electric Account Number:*	
Tax ID (SSN/FEIN)		Ameren Illinois Natural Gas Account Number:*	
Mailing Address	City	State	Zip
Contact Name	Title		
E-mail Address	Phone (xxx) xxx-xxxx	Ext.	Fax (xxx) xxx-xxxx
Secondary Contact Name (if applicable)	Phone (xxx) xxx-xxxx	E-mail Address	
Physical Installation Address (if different than above)			
Installation Address	City	State	Zip
Check one: <input type="checkbox"/> Owner <input type="checkbox"/> Tenant (If tenant, please complete the Landlord Consent Form)			
Name(s) of the person(s) who referred you to the Ameren Illinois Energy Efficiency Program for this project:			
Name of Ameren Illinois or Energy Efficiency Employee		Name of Referring Contractor or Program Ally	
Contractor/Program Ally Information (if applicable)			
Company Name	Contact Name	Title	
Mailing Address	City	State	Zip
E-mail Address	Phone (xxx) xxx-xxxx	Ext.	Fax (xxx) xxx-xxxx
Facility/Project Description			
Facility Type (check one):		If Manufacturing/Industrial, specify type:	
Office	Warehouse/Distribution	Food Processing	
Medical	Retail/Service	Automotive/Transportation/Infrastructure	
Restaurant	Manufacturing/Industrial	Other (please specify):	
Grocery	Hotel/Motel		
School/College	Multiple		
Other (please specify):			
Facility Size (total interior square feet served by the account number provided above):		Project Description (check one):	
		Replacement of Failed Equipment	
		Replacement of Operating Equipment(retrofit)	
		Process Improvement	
		New Construction – Existing Facility	
		New Construction – New Building	

Newer versions posted to the Ameren Illinois Energy Efficiency website supersede all previous versions. The revision number is listed in the footer of each page. The version of the application that was available at the time you submitted your pre-approval application will apply.

# Custom Application

ELECTRIC PROJECT CALCULATIONS AND INFORMATION			
	Make copies of this page if more than one measure is being implemented.	EXISTING OR BASELINE EQUIPMENT	NEW ENERGY EFFICIENT EQUIPMENT
A	Description of Measure <i>(e.g., compressed air, exterior lighting, VFD, or process improvement)</i>		
B	Electrical Load (total) kW = (W ÷ 1,000)		
C	Estimated Annual Hours of Operation (hours/year)		
D	Estimated kWh/year Used <i>(Row B x Row C )</i> kWh/year		
		INSTRUCTIONS	ANSWER
E	Reduced kW (kW)	(difference between the two numbers in Row B)	
F	Reduced kWh per year (kWh per year)	(difference between the two numbers in Row D)	
G	Your Electric Rate (\$/kWh)	(money spent on electricity for a year) divided by (kWh used in a year)	\$
H	Annual Energy Cost Savings (\$)	(Row F) x (Row G)	\$
I	Custom Program Incentive (\$)	Row F x \$0.06 (for all electric measures)	\$
J	Cost of Materials* <i>(please provide a quote or proposal to support this value)</i>		\$
K	Cost of Labor – External Labor Only* <i>(please provide a quote or proposal to support this value)</i>		\$
L	Project Cost	(Row J) + (Row K)	\$
M	Payback Period Before Incentive (years) <i>(must be between one and ten years)</i>	Cost / Savings (Row L) divided by (Row H)	
N	Payback Period After Incentive (years) <i>(must be between one and ten years)</i>	(Cost-Incentive) / Savings (Row L) –(Row I) divided by (Row H)	
O	Incentive is What Percent of the Job Cost <i>(Ineligible if less than 10%, capped at 50%)</i>	(Row I) divided by (Row L) x 100	_____ %

\*For new construction projects and system expansions, as well as replacement of equipment at the end of its useful life, project cost and savings are based on the incremental cost and savings of high-efficiency equipment over standard efficiency equipment.

Incentive calculations for **Custom HVAC projects** will be based upon realistic/submitted energy savings, but will be capped if the incentive exceeds \$0.015\**annual kWh usage* + \$0.25\**annual therm usage*. A completed [supplemental calculator](http://www.actonenergy.com/Portals/0/business/forms/Custom-HVAC-Calculator.xlsx) (<http://www.actonenergy.com/Portals/0/business/forms/Custom-HVAC-Calculator.xlsx>) must be submitted with the Custom application.

# Custom Application

GAS PROJECT CALCULATIONS AND INFORMATION			
Make copies of this page if more than one measure is being implemented		EXISTING OR BASELINE EQUIPMENT	NEW ENERGY EFFICIENT EQUIPMENT
A	Description of Measure (e.g., Steam system, process heat system, heat recovery, other process improvements)		
B	Natural Gas Load (total Therms per hour) Therms = (Btu ÷ 100,000)		
C	Estimated Annual Hours of Operation (Hours/Year)		
D	Estimated Annual Therms (Row B x Row C ) Therms/Year		
<b>INSTRUCTIONS</b>			
E	Reduced Therms (Therms)	(difference between the two numbers in Row B)	
F	Reduced Therms per year (Therms)	(difference between the two numbers in Row D)	
G	Your Natural Gas Rate (\$/Therm)	(money spent on gas for a year) divided by (Therms used in a year)	\$
H	Annual Natural Gas Cost Savings (\$)	(Row F) x (Row G)	\$
I	Incentive (Custom Gas Program) (\$)	(Row F) x \$.90 (for all gas measures)	\$
J	Cost of Materials* (please provide a quote or proposal to support this value)		\$
K	Cost of Labor – External Labor Only* (please provide a quote or proposal to support this value)		\$
L	Project Cost	(Row J) + (Row K)	\$
M	Payback Period Before Incentive (years) (must be between one and ten years)	Cost / Savings (Row L) divided by (Row H)	
N	Payback Period After Incentive (years) (must be between one and ten years)	Cost-Incentive / Savings (Row L) – (Row I) divided by (Row H)	
O	Incentive is What Percent of the Job Cost (Ineligible if less than 10%, capped at 50%)	(Row I) divided by (Row L) x 100	_____ %

\*For new construction projects and system expansions, as well as replacement of equipment at the end of its useful life, project cost and savings are based on the incremental cost and savings of high-efficiency equipment over standard efficiency equipment.

Incentive calculations for **Custom HVAC projects** will be based upon realistic/submitted energy savings, but will be capped if the incentive exceeds  $\$0.015 \times \text{annual kWh usage} + \$0.25 \times \text{annual therm usage}$ . A completed [supplemental calculator](http://www.actonenergy.com/Portals/0/business/forms/Custom-HVAC-Calculator.xlsx) (<http://www.actonenergy.com/Portals/0/business/forms/Custom-HVAC-Calculator.xlsx>) must be submitted with the Custom application.

# Custom Application

## Terms and Conditions

- 1. DEFINITIONS:** In addition to terms defined elsewhere herein, when any one of the following terms is used in these Terms and Conditions, wherein the first letter is written with a capital letter, then that term shall have the following definition. Words importing persons include corporation, and words importing only the singular include the plural and vice versa when the context requires.
- a) "Ameren Illinois" shall mean Ameren Illinois Company d/b/a Ameren Illinois.
  - b) "Application" shall mean the Customer completed document used to apply for cash incentives, program Terms and Conditions, and any other appropriate application-specific documentation.
  - c) "Application Guide" shall mean the downloadable file (PDF format) that includes: directions for completing the Application, Customer eligibility criteria, and any other appropriate documentation.
  - d) "Competitive Large Incentive Project" shall mean incentives applied for by submitting the Competitive Large Incentive Project Application. Those applications will go through a competitive bidding process to determine which projects will be awarded incentives.
  - e) "Customer" shall mean an Eligible Customer who has submitted an Application for incentive money using their Ameren Illinois account number. The Customer shall become a party to the agreement upon acceptance of Customer's Application by Ameren Illinois.
  - f) "Custom Programs" shall mean those projects associated with incentives that are not Standard Programs. See 1.m) below for a list of Standard Programs.
  - g) "EEM" shall mean energy efficiency measures.
  - h) "Eligible Customers" shall mean non-residential electric and/or gas Customers of Ameren Illinois. Each program has different eligibility requirements for Delivery Service rates (DS# for electric, GDS# for gas) to be eligible for that program. Refer to the specific program applications to determine if your business is eligible for that program. The Ameren Illinois incentive payments are awarded only to Eligible Customers for equipment that is owned by them and installed in the Ameren Illinois service area at the location that corresponds with the Ameren Illinois account number listed in the Application. All Eligible Customers are ultimately responsible for compliance with these Terms and Conditions.
  - i) "Facility" shall mean a single premise that, in general, consists of a contiguous tract of land separated by nothing more than a street, alley, or railroad right-of-way, where all buildings and/or energy-consuming devices are owned by a single Customer.
  - j) "New Construction" shall include construction of new buildings, change-of-use of existing buildings or land, additions to existing buildings, or when two or more building systems are renovated, such as shell and heating, heating and lighting, etc.
  - k) "Pre-approval" shall mean written notification to Customer of a maximum pre-approved incentive amount through a Pre-approval letter, which Ameren Illinois issues after review of the Customer's Application.
  - l) "Qualifying Energy Efficiency Measures (EEMs)" shall mean either (i) standard gas or electric EEMs (i.e., measures found on any of the Standard Programs applications: *Lighting, VFD, HVAC, Specialty Equipment, Steam Trap, and Leak Survey and Repair*); or (ii) measures eligible under the Custom Program approved by Ameren Illinois; (iii) measures found in the Retro-commissioning Program as identified in official program materials found on the Ameren Illinois Energy Efficiency website; or (iv) measures eligible under the *New Construction* Program approved by Ameren Illinois. Technologies that purport to save energy through reduction of voltage, demand, or power conditioning are not Qualifying EEMs. EEMs that displace electrical energy use or natural gas to another fuel (i.e., fuel switching proposals) are not Qualifying EEMs. Other than geothermal projects, renewable energy projects (solar, wind power, etc.) are also not eligible for incentives under this program. Unless explicitly pre-approved, EEMs must be new and covered by warranties. Refrigeration tune-up program eligibility requirements are specified in the Specialty Equipment – Hospitality application. Natural Gas (gas) incentives do not include propane or butane measures.
  - m) "Standard Programs" shall mean those projects associated with Standard gas or electric EEMs. Standard Programs include the following: *Lighting, VFD, HVAC, Specialty Equipment, Steam Trap and/or Leak Survey and Repair*. See the Ameren Illinois Energy Efficiency website for applications for these programs (ActOnEnergy.com).
- 2. OWNERSHIP OF CAPACITY AND/OR ENVIRONMENTAL CREDITS:**
- a) EEMs purchased and installed in part through incentives provided by this program are the property of the Customer, subject to any limitations contained within these Terms and Conditions.
  - b) Notwithstanding the above, unless otherwise requested in writing by the Customer prior to installation of the EEMs, Ameren Illinois holds sole rights to any system capacity credits and environmental credits that may be associated with EEMs for which incentives from Ameren Illinois were received, and Ameren Illinois can dispose of these credits in any manner authorized by law or regulation.
  - c) In no event shall activity associated with any energy or environmental credits noted in Section 2(b) result in interference with the Customer's sole discretion to operate EEMs as approved in his/her incentive award.
- 3. PRE-APPROVAL**
- For all Applications, Ameren Illinois is not obligated to award any incentive payment unless Pre-approval is granted. Further, Ameren Illinois will not pay incentives for any EEMs ordered or any purchase order generated prior to the date of the Pre-approval letter, UNLESS, the requested incentive is less than \$10,000 on any Standard Program Application. Pre-approval reserves incentive funds for a period up to the Estimated Completion Date provided in the Pre-approval letter. After the Estimated Completion Date, Ameren Illinois may revoke the Pre-approval letter and associated incentive funds. Customer is responsible for ensuring application is accurate and equipment meets eligibility requirements in order to receive the Pre-approval incentive payment.
- 4. POST-INSTALLATION VERIFICATION:** Ameren Illinois is not obligated to make any incentive payment until it has performed a satisfactory post-installation verification. This provision may be waived at the sole discretion of Ameren Illinois.
- 5. INCENTIVE PAYMENT AMOUNTS:**
- a) Incentive caps (per program year (June 1 through May 31), for a facility) are defined as follows:
    - i) Standard, Custom, and Retro-Commissioning applications: Electric incentives are capped at \$500,000 per project. Gas incentives are capped at \$250,000 per project.
    - ii) Caps for incentives awarded under the Competitive Large Incentive Project (CLIP), are specified in the Competitive Large Incentive Project Application.
    - iii) Incentives awarded under the Staffing Grant will be pro-rated based upon the energy savings achieved compared to the accepted savings in the staffing grant pre-approval letter, up to the pre-approved staffing grant incentive amount. See the Staffing Grant Application for further criteria.
    - iv) New Construction – Lighting incentives are capped at \$100,000.
    - v) Feasibility Study – the maximum incentive payment for a single Feasibility Study is capped at \$10,000. See the Feasibility Study application for further details.
    - vi) Leak Survey and Repair – the capped incentive is \$10,000 for a compressed air Leak Survey and Repair project. See the Leaks Survey and Repair application for further criteria.
    - vii) Metering & Monitoring – the maximum total incentive payment for Metering & Monitoring is \$20,000. See the Metering & Monitoring application for further details.
  - b) Ameren Illinois reserves the right to adjust and/or negotiate the incentive amount, based upon its independent assessment of appropriate savings or cost estimates.
  - c) Once an incentive Application is pre-approved, Ameren Illinois will pay no more than the pre-approved incentive amount.
  - d) Ameren Illinois reserves the right to cap incentives at \$10,000 for Standard projects that did not obtain pre-approval.
  - e) Incentives for Standard or New Construction applications will be capped at the project cost, which includes material cost and external labor cost (Internal labor is not considered in the project cost). Steam Trap Surveys are eligible for incentives when internal labor is used per the guidelines of the Steam Trap application.
- 6. MONITORING AND EVALUATION FOLLOW-UP VISITS:** Customer grants Ameren Illinois and any of its agents, the right to make follow-up visits, inspections or surveys of the Customer's facility during the 36 months following the completion date of the project at a time convenient to the Customer.
- 7. CHANGES IN/CANCELLATION OF THE PROGRAM:**
- a) Ameren Illinois may change the program requirements, incentives, or these Terms & Conditions at any time without notice, including suspending acceptance of Applications, denial of Applications already received, or terminating the program.
  - b) In the event of program change, Applications that have been granted Pre-approval will be processed to completion under the Terms & Conditions in effect at the time of Pre-approval by Ameren Illinois.
  - c) Cash incentives under the Ameren Illinois programs are offered on a first-come, first-served basis and are subject to project and Customer eligibility, and the availability of funds.
- 8. LIMITATION OF LIABILITY AND INDEMNIFICATION:**
- a) AMEREN ILLINOIS' TOTAL LIABILITY TO CUSTOMER UNDER THESE TERMS AND CONDITIONS, OR ANY OTHER REQUIREMENT OF CUSTOMER'S APPLICATION OR CONDITION OF INCENTIVE AWARD SHALL BE LIMITED TO PAYING THE INCENTIVE PAYMENTS SPECIFIED IN THE APPLICATION OR PRE-APPROVAL LETTERS. AMEREN ILLINOIS, ITS PARENT, AFFILIATES AND SUBSIDIARIES, AND THEIR DIRECTORS, OFFICERS, EMPLOYEES, OR AGENTS SHALL NOT BE LIABLE TO THE CUSTOMER OR FOR ANY DAMAGES IN TORT (INCLUDING NEGLIGENCE) CAUSED BY ANY ACTIVITIES ASSOCIATED WITH THIS APPLICATION; LOSS OF PROFITS OR REVENUE; LOSS OF USE OF CUSTOMER'S PROPERTY, EQUIPMENT OR POWER SYSTEM; INCREASED COSTS OF ANY KIND, INCLUDING BUT NOT LIMITED TO CAPITAL COST, FUEL COST AND COST OF PURCHASED OR REPLACEMENT POWER; OR ANY SPECIAL, INDIRECT, CONSEQUENTIAL OR INCIDENTAL DAMAGES WHATSOEVER. BY PARTICIPATING IN THE AMEREN ILLINOIS PROGRAM, CUSTOMER AGREES TO WAIVE ANY CLAIMS, EXCEPT AS PROVIDED IN THIS ARTICLE 8.a) ABOVE, AND FULLY RELEASES AMEREN ILLINOIS FROM ANY OTHER DAMAGES, OF ANY KIND ARISING OUT OF OR RELATED TO CUSTOMER'S APPLICATION.
  - b) The Customer shall defend, protect, indemnify, and hold harmless Ameren Illinois, its parent, affiliate and subsidiaries, and their representative directors, officers, employees, and agents from and against all liabilities, losses, claims, damages, judgments, penalties, costs and expenses (including, without limitation, attorney's fees and expenses) with respect to all demands, claims, suits, causes of action, and/or judgments for injuries, including death, to any person, of third parties, and for property damage incurred by or assessed against Ameren Illinois arising out of or relating to Customer's Application.
- 9. NO WARRANTIES:** Ameren Illinois does not guarantee the energy savings and its parent, affiliates, employees, and agents do not make any representations or warranties of any kind regarding the results to be achieved by the EEMs or the adequacy or safety of such measures. Ameren Illinois and its parent, affiliates, employees, and agents do not endorse, guarantee, or warrant any particular manufacturer, contractor or product, and it provides no warranties, expressed or implied, including any implied warranty of merchantability or implied warranty of fitness for any product or services. Ameren Illinois has no obligations regarding and does not endorse or guarantee any claims, promises, work, or equipment made performed or furnished by any contractors or equipment vendors that sell or install EEMs.
- 10. CUSTOMER SHALL PAY ALL TAXES:** Incentive payments received by the Customer or any Third Party Payee under this Agreement may be taxable by the federal, state, and local government. The Customer is responsible for declaring and paying all such taxes, regardless of who receives the incentive.
- a) Except as expressly provided herein, if either Ameren Illinois or the Customer desires to modify these Terms and Conditions, the modification must be in writing and signed by an authorized representative of the party against which enforcement of the modification is sought.
- 11. REMOVAL OF EQUIPMENT:** The Customer agrees, as a condition of participation in the program, to remove and dispose of any equipment being replaced by the EEMs in accordance with all applicable laws, rules, and regulations. The Customer further agrees not to reinstall any of replaced equipment anywhere in Illinois, or transfer it to any other party for installation in Illinois.
- 12. CHOICE OF LAW AND DISPUTES.**
- a) THESE TERMS AND CONDITIONS, OR ANY OTHER REQUIREMENT OF THE APPLICATION GUIDE OR CONDITION OF INCENTIVE AWARD WILL BE GOVERNED IN ALL RESPECTS BY THE LAWS, STATUTES, AND REGULATIONS OF THE STATE OF ILLINOIS. AMEREN ILLINOIS AND CUSTOMER HEREBY IRREVOCABLY AND UNCONDITIONALLY WAIVE ANY RIGHT EITHER SUCH PARTY MAY HAVE TO A TRIAL BY JURY OR TO INITIATE OR BECOME A PARTY TO ANY CLASS ACTION CLAIMS IN RESPECT OF ANY ACTION, SUIT OR PROCEEDING DIRECTLY OR INDIRECTLY ARISING OUT OF OR RELATING TO THIS PROJECT.
  - b) Customer agrees that any dispute arising out of or related to the workmanship or performance of an EEM or the adequacy or safety or such measure shall be resolved solely between the Customer and either the EEM contractor or equipment provider (Rev09)

# Custom Application

## Required Documentation Checklists

### Application for Pre-Approval

To submit your Custom application, complete and submit all the items in this checklist, and fill out the fields on this application form:

Check here if this Custom project was identified during a retro-commissioning study.

Complete all fields in the Customer and Project Information Section (p. 2)

Complete "Electric Project Calculations and Information" and/or "Gas Project Calculations and Information" tables" (p. 3 and/or p. 4)

Attach manufacturers' cut sheets for all energy saving equipment for which you are requesting incentives. *Please circle or highlight the information showing the equipment meets program technical requirements.*

Required Project Documentation (as specified on the Required Project Documentation table on p. 7.

Ensure the application is signed by the Ameren Illinois customer and that the individual signing the form has checked the box indicating compliance with the Terms and Conditions.

Completed Large Incentive Request Form (required with all applications over \$25,000) (attached after p. 7)

Signed W-9 form with Tax Identification Number associated with the Ameren Illinois customer. **Incentives WILL NOT be paid until a completed and signed W-9 has been received.**

### **Note: All Custom Projects**

You should immediately contact a member of the Energy Efficiency team should project scope, equipment, cost structure, projected energy savings, or estimated completion date change

### **Supplemental Documentation**

There are several supplemental forms required for specific situations, as described below. All supplemental documentation can be found on the Ameren Illinois Energy Efficiency Programs website at [www.ActOnEnergy.com/Forms](http://www.ActOnEnergy.com/Forms).

[Landlord Consent Form](http://www.actonenergy.com/portals/0/business/forms/landlord-consent-form.pdf) (<http://www.actonenergy.com/portals/0/business/forms/landlord-consent-form.pdf>) is required if the Ameren Illinois customer is a tenant.

[Payment Release Authorization](http://www.actonenergy.com/portals/0/business/forms/payment-release-authorization.pdf) (<http://www.actonenergy.com/portals/0/business/forms/payment-release-authorization.pdf>) is required if the incentive is to be paid to a party other than the Ameren Illinois customer.

### **CUSTOM PROJECTS WITH AN INCENTIVE REQUEST GREATER THAN \$100,000**

Return the signed pre-approval letter within 14 days of receipt.

A pre-installation inspection completed by a member of the Energy Efficiency team, including a site inspection, a client contact meeting, and project review, will be conducted.

Completion and submission of a letter of notice, signed by a corporate officer, that the company is proceeding with the project – due within 30 days of the project pre-approval.

Submission of documentation clearly demonstrating the project has commenced. This documentation may include, but is not limited to, purchase requisitions, purchase orders, invoices, sales contracts, etc., for equipment and/or services – due within 60 days of pre-approval letter (contact us if this is a problem).

Monthly contact (no later than the end of each calendar month) with a member of the Energy Efficiency team to discuss the project plan, scope, and timeline –until the project is complete and the final Incentive Payment Request is submitted.

## Customer Acknowledgment and Signature

I certify that all information provided is correct to the best of my knowledge, and I give the Company's permission to share my records with the Illinois Commerce Commission, or its contractors, who plan to evaluate my energy usage. Additionally, I will allow reasonable access to my property to verify the installation and performance of the Energy Efficiency Measures that are eligible for incentives under the Programs.

By checking this box and signing below, I certify that I have read, understood and agree to the Terms and Conditions listed above (p. 5) and that I am authorized to sign on behalf of the Ameren Illinois customer.

**Applications will not be accepted as "complete" unless this box is checked**

**Project Estimated Completion Date: (mm/dd/yyyy)** \_\_\_\_\_

**Estimated Lead Time for Major Equipment (weeks)** \_\_\_\_\_

**Print Name:** \_\_\_\_\_ **Title:** \_\_\_\_\_

**Signature:** \_\_\_\_\_ **Date: (mm/dd/yyyy)** \_\_\_\_\_

*Electronic signatures allowed and accepted by the Business Programs.*

*Typing your name above constitutes a valid electronic signature.*

# Custom Application

## REQUIRED PROJECT DOCUMENTATION

*Ameren Illinois requires sufficient project documentation to verify the savings estimates provided in the application. The following serves as guidelines for the minimum required documentation that must accompany your pre-approval application.*

### PROJECT SUMMARY

- Include a summary of proposed measures (briefly describe why you are proceeding with this project and what will be done.)

### EQUIPMENT DOCUMENTATION

- A list of equipment and components to be installed, including manufacturers' catalog/model number.
- Manufacturers' specification sheets for all major components.

### ENERGY PERFORMANCE AND OPERATIONAL SEQUENCE REQUIREMENTS

- Provide calculations documenting the predicted energy consumption of the existing usage (or base usage) and proposed design using the appropriate analytical tools and clearly stated assumptions. Calculations may be performed by "hand" but spreadsheet or computer modeling analysis is preferred, and may be supplied in electronic format.
- All assumptions such as operating hours, existing and proposed equipment, and operational details must be presented.
- List of system requirements (pressure, flows, etc.), operating hours, and control strategies (attach separate sheets).

### OTHER REQUIREMENTS AND COMMENTS

- Provide any further documentation that helps to demonstrate the performance characteristics of the project and the project's ability to demonstrate and promote energy efficiency in the Ameren Illinois service territory.
- Please provide any measured data wherever possible.
- Copy of bids to show how project cost was determined (outside labor and materials).



# Custom Application

## Large Incentive Request Form (LIRF)

The Ameren Illinois Energy Efficiency Program works with eligible Ameren Illinois non-public business customers to install cost-effective energy-efficiency projects. The program intent is to incentivize the up-front costs of energy efficiency projects that would not have been completed without the Ameren Illinois assistance. **This form is required for ALL applications with incentive or survey requests greater than \$25,000.**

Please take a moment to document (over the next three pages) how the requested financial incentive from Ameren Illinois is critical to the success of your project. Completion of this form does not guarantee the award of an incentive. If you would like assistance in completing this form, please feel free to contact the program. Mail, fax, or email to the address on the bottom of the page.

Project Calculations and Information			
A	Project Cost*	<i>Cost of materials + cost of labor (do not include internal labor)</i>	\$
B	Requested Incentive	<i>From the "Incentive Calculation" Section</i>	\$
C	Estimated Annual Savings (Electric and/or Gas)	<i>(Reduced Annual kWh*Electric rate) + Reduced Annual Therms*Gas rate)**</i>	\$
D	Estimated Payback Before Incentive	<i>Project Cost (A) / Savings (C)</i>	Years
E	Estimated Payback After Incentive	<i>(Project Cost (A) – Incentive (B)) / Savings (C)</i>	Years

\*Please provide a copy of a proposal or quotation to validate these numbers

\*\*Electric rate = \$/kWh, gas rate = \$/therm

### Special considerations or Emergency Situations

If there are special considerations that should be taken into account on your project, please briefly describe below. Expedited pre-approval may be considered for projects with substantial need. Please keep in mind that most applicants are working on tight budget calendars, so budgetary time constraints are typically not considered an emergency situation.



# Custom Application

This page and the next page are to be completed by the Ameren Illinois Customer (not by any other party)

Impact Questionnaire
Without the requested incentive funds, this project would not be completed because

Large Project Participant Survey	
<b>Item 1 – Barriers to Implementation</b>	
Ameren Illinois understands that energy savings is just one of the many potential benefits of a project. Please identify up to four (4) primary barriers that prevented this project from being installed prior to involvement by Ameren Illinois.	
	Unaware of the opportunity or possible solutions.
	Lacked confidence in potential savings.
	Lack of interest or support from company decision-makers.
	Business conditions were not suitable.
	Project payback was too long.
	Other projects or job responsibilities took priority.
	Project implementation costs were too high.
	Lack of capital or access to financing.
	Insufficient internal staffing to manage and advance projects.
	Other (Specify):
<b>Item 2 - Ameren Illinois Energy Efficiency Assistance</b> - For the identified barriers, select UP TO FOUR (4) areas where Energy Efficiency personnel provided assistance to help you overcome the barrier.	
	<p><b>Unaware of the opportunity or possible solutions.</b></p> <p>Provided suggestion/support via phone or email                      Conducted site assessment                      Customer received mailing/email information from Ameren Illinois</p> <p>Customer participated in Energy Efficiency training                      Provided Program Ally contacts for program scoping                      Program Ally provided solutions</p>
	<p><b>Lacked confidence in potential savings.</b></p> <p>Assisted with savings calculations                      Reviewed project estimates                      Refining a previously identified opportunity</p> <p>Provided incentive for Feasibility Study                      Provided customer with a case study</p>
	<p><b>Lack of interest or support from company decision-makers.</b></p> <p>Provided “ballpark” savings and incentive to decision-makers                      Met with decision-makers to discuss project and Ameren Illinois assistance</p>
	<p><b>Business conditions were not suitable.</b></p> <p>Revised incentive to address market conditions</p>
	<p><b>Project payback was too long.</b></p> <p>Incentive reduced project payback to acceptable range</p>
	<p><b>Other projects or job responsibilities took priority.</b></p> <p>Provided savings estimate showing project value                      Provided support to customer’s energy team</p>
	<p><b>Project implementation costs were too high.</b></p> <p>Provided project incentive to reduce implementation costs                      Worked with vendors or contractors to refine project scope/costs</p>
	<p><b>Lack of capital or access to financing.</b></p> <p>Provided project incentive to reduce implementation costs</p>
	<p><b>Insufficient internal staffing to manage and advance projects.</b></p> <p>Provided Staffing Grant incentive</p>

# Custom Application

Large Project Participant Survey <i>(continued)</i>	
<b>Item 3 - Customer Factors</b>	
Please check the box if the answer to any of the questions regarding this project is yes.	
Does your company have a designated Energy Manager who was involved in this project?	
Was this project part of a regulatory mandate? (if yes, please provide an explanation of why incentive money was needed.)	
Was this part of a "green" goal or specified energy reduction goal? (if yes, please provide an explanation of why incentive money was needed.)	
Is this project the same or similar to a project previously implemented by your company?	
Would you have undertaken this project in the near future even without assistance from Ameren Illinois?	
Would you consider this project or technology to be typical within your industry? (if no, please explain below)	
Are other project benefits more important than energy savings? (if yes, please provide an explanation of other benefits.)	
Other (Specify):	

## Customer Signature and Acknowledgment

Print Name: _____	Title: _____
Ameren Illinois Customer Signature _____	Date: (mm/dd/yyyy) _____
<i>Electronic signatures are not accepted for this form.</i>	
<i>The Ameren Illinois Customer must sign this section by hand and submit to the program</i>	
Name of Energy Efficiency Representative Assisting with this project: _____	

### INSTRUCTIONS (for electronic completion and submittal):

After clicking Submit (above), if a new email message appears with this completed form attached, attach your supporting documentation (cut sheets, W-9 form, signature page, etc.) to the email and click send. You can then save a copy of the completed form to your hard drive if you wish.

If a new email message does not appear, please save this completed form to your desktop. Then, create a new email message addressed to [ActOnEnergyProjects@Ameren.com](mailto:ActOnEnergyProjects@Ameren.com), attach the file you just saved as well as required supporting documentation (cut sheets, W-9 form, signature page, etc.) to the email and click send. Do not submit "zip" files.

Individual attachments may not exceed 3 MB in size. The sum of all attachments may not exceed 10 MB, (PDF documents can generally be reduced sufficiently by selecting "Reduce File Size" under the "Document" menu in Adobe Acrobat).

Applications submitted electronically, using the "submit" button above, may receive priority in the application review process.