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## Equipment Installation Application for Non-Profits

### Does your facility qualify?

- Not-for-profit entity is listed as the Ameren Illinois customer (see required documentation on page 6)
- Electric projects: electric delivery service rate DS2, DS3, DS4, DS5, or DS6 and Energy Efficiency Programs Charge on Ameren Illinois electric bill for the service point corresponding to the electric project. DS5 accounts should discuss with Ameren Illinois representatives prior to starting, especially regarding billing and metering.

### Does your project qualify?

- Replacing existing in-service (working) equipment with new, energy efficient equipment. New equipment meets eligibility guidelines as specified in this application.

### What you should know before beginning:

- The Incentive cannot be used for internal employee labor but may be used for any additional installation materials needed or external labor.**
- Pre-approval is required for ALL Standard Application projects requesting more than \$10,000 of incentive money. Do not install or pay for installation (including general purchase orders) of new equipment until receiving a pre-approval letter.
- Multiple incentive applications less than \$10,000 at the same facility within 120 days of each other will not be accepted. Phased projects requesting less than \$10,000 may submit separate applications when completion dates are at least 120 days apart.
- Stockpiles of equipment are not allowed: all equipment must be installed and operational.
- Incentives are only offered for products that also received incentives through the Ameren Illinois Instant Incentives, Online Store, or HVAC Offerings. The incentives on this application are not available for the Small Facilities or Small Business Offerings.**
- Equipment must be purchased on or after January 1, 2023.
- Projects must be completed within 120 days of equipment purchase date.
- Final application paperwork is due within 30 days of project completion **or by December 31, 2023, whichever comes first.**
- Incentive applications are capped at the project cost, which includes the costs of material and external labor
- 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.
- Not eligible for use with New Construction Lighting projects.
- Please save a copy of this form to computer and use Adobe Acrobat to complete the document. Most browsers (Chrome, Internet Explorer, Safari) do not auto-fill calculations.**

### Participation instructions:

- **Step One:** Determine if your project requires pre-approval. If the total incentive request is over \$10,000, pre-approval is required.
- **Step Two, Track A:** If pre-approval is required, submit the application for pre-approval and do not install any material or generate purchase orders until a pre-approval letter is issued. You will be notified if a pre-inspection is required.
- **Step Two, Track B:** If preapproval is not necessary, an application for "funds reserved" may be submitted, or the project may begin.
- **Step Three:** AS soon as your project is completed, submit a completed Incentive Payment Request Form and all supporting documentation requested (or entire application, if not previously submitted). Final Application paperwork is reviewed, if approved your incentive will be 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 (<https://amerenillinoisavings.com/wp-content/uploads/2021/03/application-guide.pdf>).

### Instant Incentives:

Products eligible for this application must be purchased at a discount from participating distributors through the Instant Incentives, Online Store, or HVAC Offerings. Visit [AmerenIllinoisSavings.com/instant](https://amerenillinoisavings.com/instant) for details on Instant Incentives and Online Store.

# Equipment Installation Application for Non-Profits

## Customer and Project Information

*Red indicates a required field.*

Ameren Illinois Customer Information				
Customer Name on Ameren Illinois Account	Signed W-9 form is required documentation <a href="#">Click here for a blank W-9 form</a>		Ameren Illinois Electric Account Number:	
Payment Remit To Mailing Address	City	State	Zip	
Participant Contact Name				Title
Participant E-mail Address	Phone (xxx) xxx-xxxx	Ext.	Fax (xxx) xxx-xxxx	
Secondary Participant Contact Name (if applicable)	Phone (xxx) xxx-xxxx	E-mail Address		
Physical Installation Address (if different than above)				
Installation Address	City	State	Zip	
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				
Project Description (check one): Replacement of Failed Equipment Replacement of Operating Equipment(retrofit) Process Improvement				

**Newer versions posted to the Ameren Illinois Energy Efficiency Program 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.**

# Equipment Installation Application for Non-Profits

**Non-Profit Equipment Installation**

**Eligibility Criteria:**

- The Incentive cannot be used for internal employee labor but may be used for any additional installation materials needed or external labor
- New lighting must be purchased from Ameren Illinois Instant Incentives offering at [AmerenIllinoisSavings.com/Instant](http://AmerenIllinoisSavings.com/Instant) to be eligible for an installation incentive.
- Advanced thermostats must be purchased through the Online Store ([AmerenIllinoisSavings.com/Instant](http://AmerenIllinoisSavings.com/Instant)) or must be eligible through the Standard HVAC Application.
- Make a copy of this page if additional lines are needed

Please complete the installation worksheet below.

Measure Code	Equipment installed description	Incentive per unit (A)	Units Installed (B)	Incentive (A) (B)
BPL28	Mogul Based LEDs (E39 replacements for HID lamps)	\$5.00/lamp installed	Lamps Installed	\$
BPL28	Linear TLED T5 or T5-HO	\$2.00/tube installed	Tubes Installed	\$
BPL28	Linear or U-bend TLED T8	\$2.00/tube installed	Tubes Installed	\$
BPH26	Advanced (Smart) Thermostat	\$50/thermostat installed	Thermostats Installed <i>(maximum two)</i>	\$
BPH28	Central Air Conditioner (up to 135 kBtuh)	\$200/air conditioner installed	Conditioners Installed	\$
BPH29	Air-Source Heat Pump (up to 135 kBtuh)	\$200/heat pump installed	Heat Pumps Installed	\$
BPH30	Heat Pump Water Heater	\$200/water heater installed	Water Heaters Installed	\$

<b>ESTIMATED INSTALLATION INCENTIVE:</b> Total of All Measures (A)	\$	
<b>TOTAL PROJECT COST:</b> (Total of project cost, including material cost [e.g. ballasts, sockets, "cost after incentive" of instant incentive products] and external labor cost) (B)	\$	
<b>TOTAL INSTALLATION INCENTIVE:</b> (Lesser of (A) and (B))	\$	

# Equipment Installation Application for Non-Profits

## Terms and Conditions

**1. DEFINITIONS:** Capitalized terms used but not defined elsewhere herein shall have the following meanings:

- a) **"Ameren Illinois"** shall mean Ameren Illinois Company d/b/a Ameren Illinois.
- b) **"Application"** shall mean the Customer completed program application used to apply for the specific Ameren Illinois incentive, these Terms and Conditions, and any other supplemental documentation.
- c) **"Retro-commissioning"** shall mean those projects that are found on the *Large Facility, Industrial, Retro-commissioning Lite, or Compressed Air* applications
- d) **"Customer"** shall mean an Eligible Customer who has submitted an Application.
- e) **"Custom Initiative"** shall mean those projects that are not Standard, Retro-commissioning, or Streetlighting Initiatives. Projects that are found on *New Construction Lighting, Metering & Monitoring, and Feasibility Study* are also part of the Custom Initiative.
- f) **"EEM"** shall mean energy efficiency measures.
- g) **"Eligible Customer"** shall mean a non-residential electric and/or gas customer of Ameren Illinois that own and install a Qualifying EEM at the Facility corresponding to the Ameren Illinois account number. Each program application 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 application to determine if your business is eligible for that application.
- h) **"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.
- i) **"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.
- j) **"Pre-approval"** shall mean written notification via a pre-approval letter to Customer that Ameren Illinois has reviewed Customer's Application and determined that the project meets the program eligibility requirements for a maximum pre-approved incentive amount if the project is completed by the estimated completion date and all final application paperwork is submitted and approved.
- k) **"Program Bonus"** shall mean any seasonal, temporary, or promotional additional incentive paid by Ameren Illinois to Customer.
- l) **"Qualifying Energy Efficiency Measures (EEMs)"** shall mean either (i) standard gas or electric EEMs (i.e., measures found on any of the Standard Initiative applications); or (ii) measures eligible under the Custom Initiative approved by Ameren Illinois; or (iii) measures found in the Streetlighting or Retro-commissioning Initiative as identified in official program materials found on the Ameren Illinois Energy Efficiency website. The following technologies are not Qualifying EEMs: (i) technologies that do not demonstrate measurable and verifiable energy savings, including power conditioning; (ii) technologies that displace electrical energy use or natural gas to another fuel (i.e. fuel switching); or (iii) renewable energy projects (solar, wind power, etc.). Eligible gas measures do not include propane or butane measures.
- m) **"Standard Initiative"** shall mean those projects associated with standard gas or electric EEMs. Standard Initiative includes the following: *Lighting* (not *New Construction Lighting*), *VFD, HVAC, Specialty Equipment, Equipment Installation, Smart Thermostat, Steam Trap* and/or *Leak Survey and Repair*. See the Ameren Illinois Energy Efficiency website for individual program applications ([AmerenIllinoisSavings.com](http://AmerenIllinoisSavings.com)).
- n) **"Streetlighting Initiative"** shall mean those projects that are found on the *Ameren Illinois owned* and *Municipal-owned* streetlighting applications

## 2. PRE-APPROVAL, INSPECTIONS AND FINAL APPROVAL:

- a) For all projects, Ameren Illinois is not obligated to award any incentive payment unless an Application is submitted and Pre-approval is granted. 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 Initiative 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 reserved incentive funds. Customer is responsible for ensuring that the project is completed by the estimated completion date, the Application is complete and accurate, and the project meets program eligibility requirements in order to receive final approval and the incentive payment.
- b) A pre-approval inspection and post-installation inspection of the project may be required before an incentive payment is made.
- c) Ameren Illinois reserves the right to request additional supporting documentation as deemed necessary to ensure program eligibility and verify that the expected energy savings will occur.

## 3. INCENTIVE PAYMENT AMOUNTS:

- a) Incentive caps are defined as follows:
  - i) Standard, Custom, Retro-Commissioning, and Streetlighting Applications: Electric incentives may be capped per project. Gas incentives are capped at \$100,000 per project.
  - ii) New Construction Lighting, Feasibility Study, Leak Survey and Repair, Strategic Energy Monitoring, Small Business Direct Install, and Metering & Monitoring incentives are capped all capped at lower amounts. Please see individual program applications for further details.
- b) Ameren Illinois reserves the right to adjust the incentive amount, based upon its independent assessment of appropriate savings or cost estimates.
- c) Ameren Illinois will pay no more than the incentive amount in the Pre-approval letter.
- d) Ameren Illinois reserves the right to cap incentives at \$10,000 for Standard Initiatives that did not obtain Pre-approval.
- e) The sum of all Incentives and any applicable Program Bonuses for Standard Initiative, Custom Initiative, or Streetlighting Initiative will be capped at the project cost, which includes material cost and external labor cost. Internal labor cost is not considered in the project cost. Steam Trap Surveys are eligible for incentives when internal labor is used according to the Steam Trap Application.

**4. MONITORING AND EVALUATION:** Customer grants Ameren Illinois and any of its agents, the right to make follow-up visits, inspections, metering, data collection and/or surveys of the Customer's Facility during the 36 months following the completion date of the project to verify the installation and performance of the EEMs that were funded by incentives upon reasonable notice to Customer. If Customer removes the EEMs at any time or Customer ceases to be a delivery service customer of Ameren Illinois within 36 months after installation, Ameren Illinois shall be entitled to recover from Customer the total amount of incentive payments made plus interest.

# Equipment Installation Application for Non-Profits

**5. CUSTOMER DATA:** By submitting an Application, Customer understands and authorizes Ameren Illinois and its third party providers and agents to retain Customer's Application, and use, store and share the information contained in the Application, together with such data and documentation collected in connection with the project, for the program and its internal business purposes. Customer agrees that Ameren Illinois may share such information with the Illinois Commerce Commission, or its contractors, who plan to evaluate my energy usage. Ameren Illinois may release aggregated, non-identifiable data to third parties for regulatory and non-regulatory purposes.

**6. CUSTOMER SHALL PAY ALL TAXES:** Incentive payments received by Customer or any third party payee designated by Customer on a Payment Release Authorization Form may be taxable by the federal, state, and local government. Customer is responsible for declaring and paying all such taxes, regardless of who receives the incentive.

**7. REMOVAL OF EXISTING EQUIPMENT:** 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. Customer further agrees not to reinstall any replaced equipment or transfer it to any other party for installation in Illinois.

**8. OWNERSHIP:**

a) EEMs purchased and installed with incentives provided by this program, and all energy savings realized from the installation of such EEMs, are the property of Customer.

b) In consideration of the incentives provided by this program, Customer agrees that Ameren Illinois is entitled to all rights to any system capacity and environmental credits and attributes that may be associated with EEMs for which incentives from Ameren Illinois were received, and Customer waives, and agrees not to seek, any right to the same.

**9. CHANGES OR CANCELLATION OF THE PROGRAM:**

a) Ameren Illinois, in its sole discretion, may change any of the terms and conditions of the program, suspend acceptance of Applications, deny Applications already received and not yet pre-approved or terminate the program at any time without prior notice.

b) In the event of program change or cancellation, Applications that have been pre-approved will be processed to completion under the program requirements and Terms and Conditions in effect at the time of Pre-approval by Ameren Illinois.

c) Incentives under the program are offered on a first-come, first-served basis and are subject to project eligibility and the availability of funds.

**10. 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 PAYMENT OF THE AMOUNT OF THE INCENTIVE PAYMENTS DUE TO CUSTOMER IN THE APPLICATION OR PRE-APPROVAL LETTER ACCORDING TO THE PROGRAM. AMEREN ILLINOIS, ITS PARENT, AFFILIATES AND SUBSIDIARIES, AND THEIR DIRECTORS, OFFICERS, EMPLOYEES, CONTRACTORS OR AGENTS SHALL NOT BE LIABLE TO THE CUSTOMER FOR THE CUSTOMER'S FAILURE TO ACHIEVE ANY RESULTS IN ENERGY SAVINGS; THE OPERATION OF THE CUSTOMER'S FACILITY; 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 IN CONNECTION WITH CUSTOMER'S APPLICATION, CUSTOMER'S PARTICIPATION IN THE PROGRAM, ANY EEMS INSTALLED AT CUSTOMER'S FACILITY OR ANY ACTIVITIES ASSOCIATED WITH THE PROJECT. *BY PARTICIPATING IN THE AMEREN ILLINOIS PROGRAM, CUSTOMER AGREES TO WAIVE ANY CLAIMS, EXCEPT AS PROVIDED IN THIS SECTION, AND FULLY RELEASES AMEREN ILLINOIS FROM ANY DAMAGES, OF ANY KIND ARISING OUT OF OR RELATED TO CUSTOMER'S APPLICATION AND ANY EEMS INSTALLED AT CUSTOMER'S FACILITY.*

b) Customer shall defend, indemnify, and hold harmless Ameren Illinois, its parent, affiliate and subsidiaries, and their representative directors, officers, employees, contractors and agents from and against all liabilities, losses, claims, damages, judgments, penalties, costs and expenses (including, without limitation, attorney's fees and expenses) from and against third party claims for injuries, including death, to any person, or for property damage, or for payment for goods or services arising out of or relating to Customer's Application or any EEMs installed at Customer's Facility.

**11. NO WARRANTIES:** Ameren Illinois and its parent, affiliates, employees, contractors and agents do not guarantee the energy savings, and 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, contractors and agents do not endorse, guarantee, or warrant any particular manufacturer, contractor or product, and do not endorse or guarantee any claims, promises, work, or equipment made performed or furnished by any contractors or vendors that sell or install EEMs.

**12. CHOICE OF LAW AND DISPUTES.**

a) THESE TERMS AND CONDITIONS, OR ANY OTHER REQUIREMENT OF THE APPLICATION 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 PROGRAM.

b) Customer agrees that any dispute arising out of or related the workmanship or performance of an EEM or the adequacy or safety or such measure shall be resolved solely between the Customer and the EEM contractor or equipment provider. **(Rev17)**

# Equipment Installation Application for Non-Profits

## Required Documentation Checklist & Terms of Agreement

### Application for Pre-Approval

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

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

Ensure all qualifying equipment is entered in the Incentive Calculation Section (pg. 3)

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

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 is received.

Proof of not-for-profit status (options listed below)

Proof that the Internal Revenue Service currently recognizes the applicant as an organization to which contributions are tax deductible under section 501(c)(3) of the Internal Revenue Code;

A statement from a State taxing body or the State Attorney General certifying that:

(i) the organization is a nonprofit organization operating within the State; and

(ii) no part of its net earnings may lawfully benefit any private shareholder or individual;

A certified copy of the applicant's certificate of incorporation or similar document if it clearly establishes the nonprofit status of the applicant; or

Any item described in paragraphs (b) (1) through (3) of this section if that item applies to a State or national parent organization, together with a statement by the State or parent organization that the applicant is a local nonprofit affiliate.

### 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 <https://amerenillinoisavings.com/business-forms-library/>.

Payment Authorization Form is required if the incentive is to be paid to a party other than Customer.

Large Incentive Request Form is required if the total requested incentive is over \$50,000.

Landlord Consent Form is required if the Facility is under lease.

### Other Required Information

Upon receipt of the pre-approval letter, Customer should immediately contact a program representative regarding any change to the project scope or timeline (including changes to equipment, project costs, projected energy savings or estimated completion date) to discuss how the change will impact your savings/incentive and the necessary steps required to request incentive changes.

## Terms of Agreement: Customer Acknowledgment and Signature

I certify that all information provided in this Application is correct and complete. I have read, understand and agree to the program requirements and the Terms and Conditions set forth in this Application, and I agree to abide by these requirements.

By checking this box and signing below, I certify that I have authority to make these statements and submit this Application.

**Applications will not be accepted as "complete" unless this box is checked and all of the below fields are completed.**

Project Estimated Completion Date, by 12/31/2023: (mm/dd/yyyy) \_\_\_\_\_

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

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

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

*Please note, the application **must** be signed & dated by the customer contact or otherwise authorized 3<sup>rd</sup> party. Electronic signatures allowed and accepted by the Business Program. Typing your name above constitutes a valid electronic signature.*

# Equipment Installation Application for Non-Profits

## Incentive Payment Request Form

This form and required documentation should only be submitted upon project completion. Project completion is defined by the Ameren Illinois Energy Efficiency Programs as all equipment installed and operable. The documentation required for submission with a signed Incentive Payment Request Form varies based on project size and the project scenario as described below.

### Required Documentation Checklists

#### ALL PROJECTS

Completed this form? (Signed by the Ameren Illinois customer and checked the box indicating compliance with the Terms and Conditions.)

Changes since pre-approval? (If applicable, submit a written summary of the specific changes and the rationale for the changes.)

Invoices submitted? (Must show the date, place of purchase, model/part numbers, quantities and unit costs of all equipment.)

Signed W-9 submitted?

Certified Installer used or self-installed by Ameren Illinois customer listed on this application? Please list the Certified Installer here, exactly as they are registered with the Illinois Commerce Commission (for a full list, visit <https://www.icc.illinois.gov/emdb/ucdb/search> and choose Authority Type, 'EnergyEfficiency Installers.').

## Payment Request: Project Completion Acknowledgment and Signature

I certify that all information provided is correct and complete. I have read, understand and agree to the program requirements and the Terms and Conditions set forth in this Application, and I agree to abide by these requirements.

By checking this box and signing below, I certify that I have authority to make these statements and submit this Application. All equipment is installed and operational (not placed into storage). **Applications will not be accepted as "complete" unless this box is checked and all of the below fields are completed.**

Company Name (Ameren Illinois Customer): \_\_\_\_\_

Project Number (Pre-Approved Projects Only): \_\_\_\_\_

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

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

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

*Please note, the application must be signed & dated by the customer or otherwise authorized 3<sup>rd</sup> party. Electronic signatures allowed and accepted by the Business Program. Typing your name above constitutes a valid electronic signature.*