

## Staffing Grant Application

### Eligibility

The Staffing Grant is intended for labor to identify and develop energy efficient projects. This initiative is a competitive bid process - all applications for the Program Year 2023 Staffing Grant offer are DUE NO LATER THAN September 1, 2023. If you have energy-efficiency projects that cannot be completed due to lack of staff resources, this competitive incentive offers funding towards a project manager or energy specialist to ensure the completion of energy efficiency project(s). The manager may be a new or existing full- or part-time employee or consultant, and a company may share an employee or consultant between multiple facilities.

- You may apply for the following per Staffing Grant: Base incentive: \$5,000 [\$15,000 for over 15,000 MWh facility annual usage]
- Contingent quarterly **incentive payments for continual participation: \$5,000 base incentive per performance period** (3 months, up to four periods contingent on program approval totaling either \$20,000 or \$60,000 depending on base incentive) [\$15,000 for over 15,000 MWh facility annual usage]
- **Performance incentive based on savings: \$0.03/kWh, \$0.20/therm** for projects that have completed and received final approval from the program during the performance period. (In addition to performance incentives, projects will retain eligibility for Standard and Custom Application incentives.)
  - For Longer-term projects falling outside total performance period timeline, performance incentives may still be available with program approval.

Additionally, the following apply to Staffing Grant Applications:

- Retro-commissioning, Leak Survey & Repair, Metering & Monitoring and Strategic Energy Management (SEM) projects and savings cannot be combined with Staffing Grants.
- Midstream projects (Midstream HVAC/HPWH, Instant Incentive Lighting, Midstream Food Service) can be included in the list of Staffing Grant projects, however, you must notify Ameren Illinois Energy Efficiency when the Midstream transaction occurs.
- At conclusion of performance period, program staff will meet with customer and determine eligibility for subsequent performance periods based on completed projects and projects under development.
  - Larger projects and/or projects farther in development will be most likely to remain eligible. Full list of completed/under development projects will be considered.
- Project base incentive will be paid at the start of the performance period. Performance incentives will be paid out the end of the performance period for projects that have been approved after project completion.
- The Staffing Grant will not be counted as part of any project or facility maximum incentive cap.
- Performance incentives will not be applied to any projects that already have financial commitments or have been submitted to the Ameren Illinois Energy Efficiency program.

To be eligible for electric projects, you must have electric delivery service rate DS2, DS3, DS4, DS5, or DS6 and an Energy Efficiency Programs Charge on the Ameren Illinois electric bill for the service point corresponding to the electric project. To be eligible for gas projects, you must have gas delivery service rate GDS2, GDS3, GDS4, GDS5, or GDS7 and an Energy Efficiency Programs Charge on your Ameren Illinois gas bill. DS5 accounts should discuss with Ameren Illinois' representatives prior to starting. See the Terms and Conditions of this application for details.

### Effective Dates

September 1, 2023: Application submittal deadline

Within two weeks after performance period ends: Performance review occurs

Contingent on program approval: additional 3-month performance period followed by performance review.

### Instructions

**Step 1:** Complete and sign the Staffing Grant Application form, as required. Submit the Application form and all required documentation as indicated to the program via email to [illinoisbusinessprojects@ameren.com](mailto:illinoisbusinessprojects@ameren.com) or hard copy. Do not submit "zip" files via email. You will receive an e-mail within two business days confirming we received your application.

**Step 2:** Applications will be reviewed and scored according to the criteria below. Applications awarded the highest scores will be given priority. Additional information may be requested.

**30 points - Potential Projects** (Table 2)

**20 points - Funding Strategy** (Table 3)

**20 points - Need for Funding** (Table 4)

**10 points - Community Development** (Table 5)

**10 points - Completeness of Application.** Applications should be thorough and complete, providing all required information.

**10 points - Letter of Commitment.** Letters of commitment provided by the customer supporting the execution of feasible resulting projects. The letter should be on company letterhead.

**Step 3:** You will receive notification if your application has been selected for this initiative. Complete and submit individual project applications to be applied towards your Staffing Grant. All individual projects must meet specification requirements listed on the program applications (including individual project pre-approval, as necessary).

**Step 4:** At the end of the three-month performance period, provide documentation showing work completed using Staffing Grant funds (i.e. metering, inspections, studies, projects submitted, RFPs, quotes, POs, contracts, etc.)

**Step 5:** Upon receipt of completion documentation Program staff may conduct a post installation inspection for verification purposes.

**Please note:** Detailed, step-by-step instructions, FAQs, and other helpful information are available on the program website in the [Application Guide](https://www.amerenillinoisavings.com/wp-content/uploads/2021/03/application-guide.pdf) (<https://www.amerenillinoisavings.com/wp-content/uploads/2021/03/application-guide.pdf>). If you have not received a receipt confirmation within two business days of sending materials to the program, please contact us at [IllinoisBusinessEE@ameren.com](mailto:IllinoisBusinessEE@ameren.com). Program representatives can also be reached by calling toll free 1.866.800.0747.

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## Customer and Project Information

Red indicates a required field.

Table 1 - 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: * Ameren Illinois Natural Gas Account Number: *  <span style="color: red; font-size: small;">*Both electric and gas account numbers are required if you are an Ameren Illinois electric and gas customer.</span>														
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):  <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">Office</td> <td style="width: 50%;">Warehouse/Distribution</td> </tr> <tr> <td>Medical</td> <td>Retail/Service</td> </tr> <tr> <td>Restaurant</td> <td>Manufacturing/Industrial</td> </tr> <tr> <td>Grocery</td> <td>Hotel/Motel</td> </tr> <tr> <td>School/College</td> <td>Multiple</td> </tr> <tr> <td colspan="2">Other (please specify):</td> </tr> </table>		Office	Warehouse/Distribution	Medical	Retail/Service	Restaurant	Manufacturing/Industrial	Grocery	Hotel/Motel	School/College	Multiple	Other (please specify):		If Manufacturing/Industrial, specify type:  Food Processing Automotive/Transportation/Infrastructure Other (please specify):		
Office	Warehouse/Distribution															
Medical	Retail/Service															
Restaurant	Manufacturing/Industrial															
Grocery	Hotel/Motel															
School/College	Multiple															
Other (please specify):																
		Facility Size (total interior square feet served by the account number provided above):														

**Newer versions of the application forms 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.**

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<b>Table 2 – Potential Projects</b>			
List projects that are descriptive and thoughtful towards facility needs ( i.e. aging, inefficient equipment, etc.)			
Project Number	Potential Projects	Estimated Timeframe	Status of Project (idea to investigate, under development, etc.)
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

<b>Table 3 – Funding Strategy</b>
Provide roadmap to show how funding will be used for additional resources to complete eligible Ameren IL energy efficient projects (i.e. consultant, internship, etc.). This should include project management/technical resources that will be used during the performance period (note: this could be more than one individual).

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## Table 4 – Need for Funding

Provide evidence that the projects listed have not been implemented in large part due to lack of staff time. For instance, historical evidence the project(s) has/have been on hold due to lack of staff time. Explain how this incentive is essential to the implementation of the projects listed in Table 2.

## Table 5 – Community Development

Applications with any of the following factors emphasized will receive additional points; energy savings to an economically challenged community, increased levels of safety for a workforce or community, promoting diversity within the workplace or community, or helping locally-owned businesses within the Ameren Illinois territory.

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**Table 6 – Energy-Efficiency Project Staff**

Description of the applicant’s energy-efficiency project staff, including personnel names, position titles, and their organizational structure. A member of this staff must be designated as the point of contact for program correspondence. This should include project management/technical resources that will be used during the performance period (note: this could be more than one individual). Organizational chart or staff structure can be submitted in a separate document.

Name	Position Title	Phone Number	E-mail

# Staffing Grant 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) "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.
- e) "Custom Initiative" shall mean those projects associated with incentives that are not Standard or Streetlighting Initiatives, including but not limited to: *Custom, New Construction Lighting, and Feasibility Study*. See 1.k) below for a list of Standard Initiative Applications.
- f) "EEM" shall mean energy efficiency measures.
- g) "Eligible Customers" shall mean non-residential electric and/or gas Customers of Ameren Illinois. Each 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 applications to determine if your business is eligible for that application. 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.
- 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 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.
- k) "Program Bonus" shall mean any seasonal, temporary, or promotional additional incentive monies provided by Ameren Illinois to the 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: *Lighting, VFD, HVAC, Specialty Equipment, Steam Trap, and Leak Survey and Repair*); 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. 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. Natural Gas (gas) incentives 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, Municipality Owned Street Lighting, Smart Thermostat, Steam Trap and/or Leak Survey and Repair*. See the Ameren Illinois Energy Efficiency website for applications (AmerenIllinoisSavings.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 Initiative Application (see 1.j above). 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 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 \$100,000 per project.
  - ii) 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.
  - iii) 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 applications 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) The sum of all Incentives and any applicable Program Bonuses for Standard, Custom, 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. If Ameren Illinois discovers that the EEMs were not actually and properly installed or were subsequently disconnected within 36 months after installation, Ameren Illinois shall be entitled to money damages equal to the total amount of incentive payments made plus interest.

### 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.

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**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 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 (**Rev16**).

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## Required Documentation Checklists

- Complete all fields and tables in the Staffing Grant Application
- Submit signed W-9 form with Tax Identification Number associated with the Ameren Illinois customer. Applications selected will not be preapproved until a completed and signed W-9 has been received.
- **Submit a *Letter of commitment* provided by the customer supporting the execution of feasible resulting projects. The letter should be on company letterhead.**

## 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. 4). **Applications will not be accepted as "complete" unless this box is checked.**

**Requested Incentive Amount** \_\_\_\_\_

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

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

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

*Electronic signatures allowed and accepted by the Business Programs.  
Typing your name above constitutes a valid electronic signature.*