



Ameren Illinois Energy Efficiency Program SBDI Program Ally Kickoff

1-10-1-13

Shane Perry, Deputy Business Program Manager

Why You Are Here Today

- 1. What's in it for you?
- 2. Marketing & Co-branding
- 3. Illinois Commerce Commission (ICC)
- 4. Application Review & Approval
- 5. Photo Requirements
- 6. Product Requirements
 - a. Design Lights Consortium (DLC) w/ Demo
 - b. Snapshot Qualified Products List (QPL) w/ Demo
- 7. Incentive Changes
- 8. SBDI Support
- 9. Q&A
- 10. Recap & What's Next



What's In It For You Today

- ✓ Clarification on roles and communication with Program staff.
- ✓ Faster turnaround time when processes are understood and followed "Speed to Check".
- ✓ Less back and forth communications with processing teams.
- ✓ Accurate assessments to final invoice without scope changes are the best path for fast processing.
- ✓ Quality photos for existing and final (the more the better).
- We strive to make the process as easy as possible while adhering to requirements.
- ✓ SBDI has the *best incentives* for Business in the region!







Marketing & Co-Branding

Jordan Nelson, Program Ally Marketing Manager



- <u>Two types of co-branding materials:</u>
 - FREE pre-designed materials on the Program Ally Marketing Portal.
 - We make materials for you to print and distribute.
 - No additional approval needed.
 - Materials using Program graphics.
 - You create your own materials and use our approved graphic.
 - Requires **pre-approval** from the Program.



All co-branding activity must adhere to the Co-Branding Requirements document found on the Program Ally Portal.

- Approved Graphic
- Approve Usage
- Text References

CO-BRANDING REQUIREMENTS

For Ameren Illinois Registered Program Allies

Thank you for being a Registered Program Ally with the Ameren Illinois Energy Efficiency Program. When it comes to marketing, you have two options of co-branding with the Program:

1) Free, Program designed and pre-approved co-branded collateral.

 Program Ally custom designed materials with the approved Ameren Illinois Energy Efficiency graphic and/or text references.

Program pre-designed co-branded materials are designed by the Ameren Illinois Energy Efficiency Program, it includes your contact information, and are readily accessible to Program Allies for immediate use. These materials are free, pre-approved, and can be printed and/or downloaded at your convenience.

As for custom designed materials, this guide specifically addresses the requirements you **MUSI** follow in the approval process of incorporating the approved Ameren Illinois Energy Efficiency graphic and/or any text references to your participation with our Program within your materials.

> request pre-designed materials or to submit custom materials, vis <u>AmerenIII inoisSavings.com/Ally</u>

PROGRAM ALLY CO-BRANDING

Materials co-branded with reference to the Ameren Illinois tearrys (Efficiency Program are intended to support the promotion of the Program Ally's company. Any Ameren Illinois components should be secondary and smaller than the Program Ally's company component. Program Allys company component, but the Ameren Illinois name materials that are co-branded with the Ameren Illinois name

and/or approved graphic as outlined in this guide.

APPROVED GRAPHIC

Registered Program Allies may only use the approved graphic to represent their involvement in the Ameren Illinois Energy Efficiency Program. **Program Ally use of any other Ameren Illinois logo is strictly prohibited**.

IMPORTANT NOTE: This graphic has its own approved uses in advertisements, marketing materials, and business cards. Plaase refer to the <u>APPROVED USES</u> section on page 3 for more details.



ENERGY EFFICIENCY PROGRAM Registered Program Ally



Program Ally Marketing Portal



- Marketing materials to help you sell energy-efficient equipment and projects.
- Order a selection of professionally printed and downloadable pre-designed materials at no charge from the Program Ally Marketing Portal found on the Program Ally Portal.

Ameren ILLINOIS Small Business Direct ENERGY EFFICIENCY Install Initiative RIGHTEN THINGS UP WITH UPDATED LIGHTIN AND MAXIMIZE ENERGY SAVINGS AT MINIMAL COST MORE WAYS TO SAVE The Small Business Direct Install Initiative serves eligible Ameren Illingis small Your facility may be eligible for businesses and public sector facilities additional incentives through the Ameren Illinois Energy Efficiency Business Program such as: Specialty Equipment HVAC Equipment Water Heaters he Small Rusiness Direct Install Initiative offers nenerous energy WHY SHOULD I efficient lighting and refrigeration incentives to assist Small Busines customers in adding to their bottom line through energy efficiency PARTICIPATE? 🗶 Custom Projects Unique to upgrades. Incentives from the Ameren Illinois Energy Efficiency Your Facility Program allow you to maximize energy efficiency project savings a minimal cost A local electrical contractor (Program Ally) of your choice will omplete the project, including installation. An Ameren Illinois HE ENERGY EFFICIEN Energy Advisor can offer you additional assistance and Program All LIGHTING **OUESTIONS?** here is absolutely no catch. The Ameren Illinois Foerny Efficiency Program wants to help your small business save energy and reduce HAT'S THE Contact us by email at operating costs. This Initiative provides financial incentives to sBusinessEE@ameren.com o CATCH? Ameren Illinois Small Business customers to help offset the cost of by phone at 1.866.800.0747. energy efficiency projects. to review eligibility requirements, visit ontact us W DO LOFT By email at IllinoisBusinessEE@ameren.com STARTED By phone at 1,865,800,0747 SCHEDULE YOUR FREE ASSESSMENT TODAY Visit AmerenIllinoisSavings.com/SmallBusiness or call 1.866.800.0747 CONTACT A PROGRAM ALLY Bey 2/23



Program Ally Portal



- AmerenIllinoisSavings.com/Ally
- Access the latest Co-Branding Requirements document.
- Order marketing materials, submit materials for approval and download approved logos.
- Contact Jordan Nelson at <u>jnelson2@ameren.com</u> with any questions.

Marketing & Sales Resources

+ Co-branding Requirements, Requests, Online Store, & Logos



Illinois Commerce Commission (ICC)

Jordan Nelson, Program Ally Marketing Manager





- Illinois energy legislation requires contractors who are installing energy efficiency measures to be certified with the Illinois Commerce Commission (ICC).
- Applies to any measure that requires an electrical connection.
 AND
 Applies to any measure that will receive an incentive of \$300 or more.
- Certified installers agree to comply with building and electrical codes and manufacturer's installation instructions.
- Self-installed measures (those installed by an internal employee or staff member) are excluded from the certification requirement.



- Certified energy efficiency measures installers must submit a recertification report.
- Installer Recertification must be submitted to the ICC between Jan. 1 June 1 annually to avoid ICC late fees.
- There are no fees to recertify, however, late fees could be high if your recertification isn't submitted by June 1 annually.
 - Our Program cannot issue incentive payments until recertification is up to date.



AmerenIllinoisSavings.com/Installer

ICC Recertification Delays and Fines



- Only a \$100 fee for new ICC certifications, June 1 deadline for notarized recertification (*no charge if recertification submitted on time*).
- To avoid possible delays in payments or fees* from the ICC, we strongly recommend that contractors doing electrical work register and stay in good standing annually with the ICC for the current fiscal year dating back to original filing year.

***Up to a \$1,000 annual fine from the ICC for failure to recertify and not remaining in good standing.





Application Review & Approval

Ameren Illinois

Mike Thompson, Small Business EA Manager Colin Santel, Energy Engineer

Pre-Approval



- What is pre-approval?
 - Assessment evaluation to verify measures are being utilized correctly.
 - Verify eligibility of proposed equipment for installation.
 - For lighting, if it is on the QPL it is eligible.
 - If the equipment is installed as listed and intended.
 - For non-lighting or other non-DLC equipment, spec sheets are still required.
 - Refrigeration measures, remote occupancy sensors.
 - Energy Star is no longer eligible for SBDI due to regulation and TRM changes.
 - Establishes and reserves funding for specific project.
 - Provided scope of project of equipment used has not changed.
 - Establishes the start of project completion timeline.
 - Projects are required to be completed within 90 days of pre-approval.



Please email smallbizil@ameren.com for all project questions & changes.

Data Requirements

- Customer information
 - Name, address, phone number, email address.
 - A means to contact the customer if necessary.
 - Site address (if different from above), utility account, facility type.
 - Utility account that supplies the equipment being updated.
 - Personal Identifiable Information (PII) restrictions for sharing Ameren customer account information.
- Photos.
 - Photo of each existing fixture type, nameplates and a photo that captures quantity/magnitude of the project scope.
 - Fixtures over 400-watts require nameplate and lamp stamp for verification.
 - Photos need to be clear and identifiable to measure intended.
 - Photos should also help identify hours of operation for exterior lighting.
 - Photocells / Dusk to Dawn Sensors.





Final Approval

- What is final approval?
 - Initial process for payment of completed projects.
 - Verification of installation of all equipment as per pre-approved assessment.
 - Specified and eligible equipment installed and operational.
 - Model/Part number match exactly as listed in QPL.
 - Quantities installed as were approved on original assessment.
 - All required documentation has been properly submitted.
 - All pages of the work order, signed by customer upon project completion.
 - Signed W-9 for customer, matching the utility account name.
 - Customer W-9 required at pre-approval to avoid payment delay.
 - Program Ally W-9 and ACH Form (in Snapshot) required at start of each Program Year.
 - Clear photos to show each type of equipment installed and scope/quantity.
 - Customer invoice to list material and labor.



Invoices



Required Details for Invoices

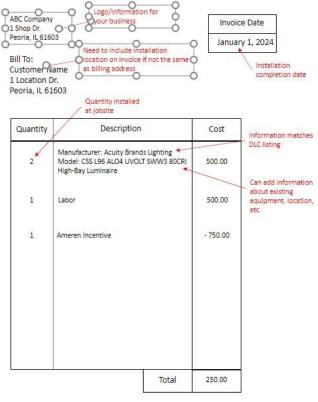
- Date of Project Completion
- Your Company Name and Address
- Name of Customer and Address
 - Project address if different from mailing address
- Individual Lines of Installed Equipment
 - Information matches DLC 5.1 listing (or most current DLC listing).
 - Provide DLC Product ID numbers on the invoice to streamline processing and avoid delays.
 - For non-QPL equipment, a spec sheet will be required.
 - Additional information or location details added to streamline processing and avoid delays.
 - Quantity of equipment installed for project.
- Individual Line of Labor for Project
 - Additional charges for lifts, etc.
- Project Total Cost
 - Ameren Illinois Incentive
 - <u>Customer Co-pay</u>



"Help us Help you"

Invoice Sample





- This is a sample of an acceptable invoice.
 - Date of installation
 - May be different than date of invoicing.
 - Your company name and address
 - Customer name and address
 - Project address if different from mailing address.
 - Equipment installed
 - DLC 5.1 Listing
 - Quantity
 - Labor

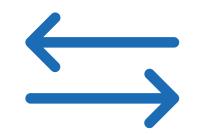
- Line Item Cost
 - Cost for each product
 - Ameren Incentive
 - Customer Co-pay
- You DO NOT need to copy or utilize this format.
 - This provides a model for what is required.
- Distributor invoices are NO longer accepted.

Editing Projects



Sometimes things need to be changed, corrected or clarified.

- 1. Reach out to <u>SmallBizIL@Ameren.com</u> inbox.
 - a. Copy your Small Business Energy Advisor..
 - b. Note the Project Number in the subject of the email.



- Request the project to be unlocked with a brief description Why the changes are needed.
- 3. Once changes made, include a comment in Snapshot for What changes were done.

- ✓ Accurate assessments to final invoice without changes is your best path to processing.
- ✓ If this is a Program request change, simply reply to the email to address all items.

Program Expectations

What the Program needs from you?

- Accurate assessments
 - Correct existing facility evaluation
 - Accurate counts
 - Correct wattage
 - Verified hours of operation for exterior lighting
 - o Utilizing eligible equipment
 - Lighting equipment selected from the QPL
 - Spec sheets for all other equipment
- Timely project completion
 - Once pre-approval is granted, you have 90-days to complete the project
 - Designed for a quick turn-around, be sure to reply to ECD messaging if project exceeds initial date. Projects will be voided, could be reopened with exception.
- Complete final documentation
 - All requirements as per Final Assessment section





Relevance of the <u>SmallBizIL@Ameren.com</u> email inbox.

- This is the internal point of contact for the SBDI Program.
 - Internal personnel no longer receive direct phone calls or emails.
 - Small Business Energy Advisors can always be contacted.
- The inbox is monitored during standard business hours.
 - Monday Friday / 8:00 a.m. 5:00 p.m.
 - Copy your Small Business Energy Advisor
 - o Note the Project Number
- Email us for all Snapshot related issues and changes
 - Let us know in the Survey if you don't receive these emails and want to.





Account Verification

- To confirm or identify Account #, please have the Ameren customer call the Business Customer Support line at 800.232.2477.
 - Account #
 - Billing Questions
 - Service Rate
 - Other Questions
 - Hours: M-F 7:00 a.m. 5:30pm
- Request customer to have utility bill at Assessment.





CHS CHE

Photo Requirements

Shane Perry, Deputy Business Program Manager

Photos Tell the Story

Improving Application Processing Efficiency

- GOAL: Improve overall application documentation to expedite application processing.
- Improved pictures with applications should provide a clear visual of any project's scope.
- Will help reduce back and forth communication and inaccuracies found during inspections.
- Some best captured during installation.

What to Include

Pre and Post Photos:

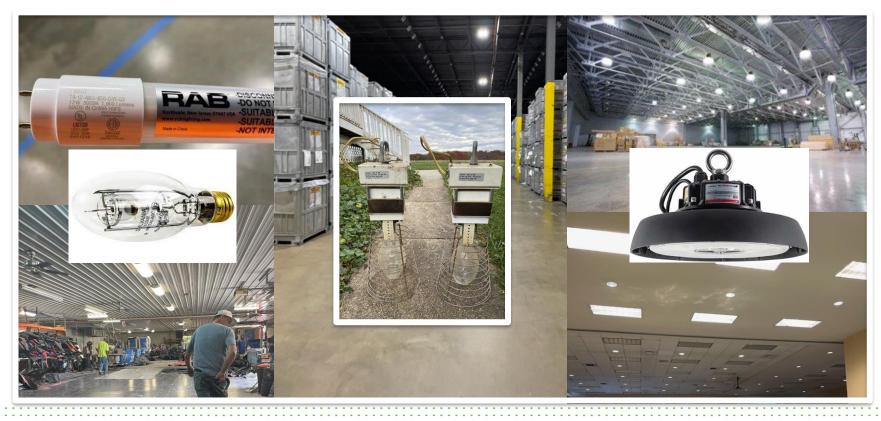
- Two photos per measure (min.).
- Details of old and new items:
 - Model
 - Wattage
- Broader view of project:
 - Equipment installation.
 - Room picture of total light fixtures.
 - Uninstalled equipment.



Interior Lighting Photos



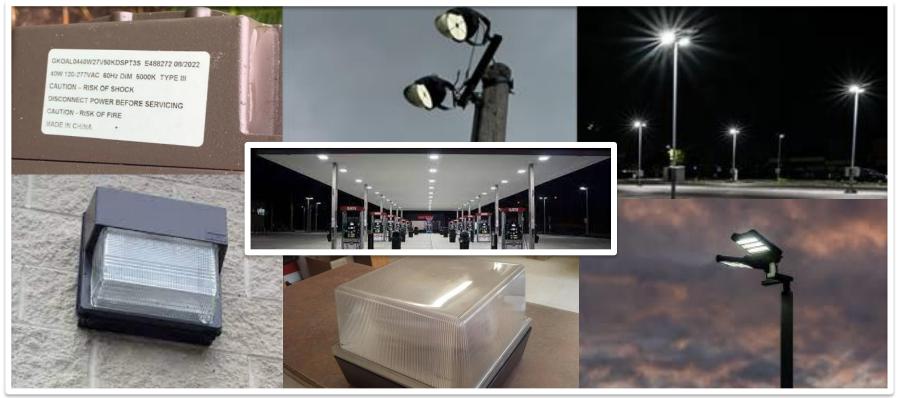
Examples of lamp/ballast labels, fixture close-up and project area scope.



Exterior Lighting Photos



Examples of lamp/ballast labels, fixture close-up and project area scope.



In-Progress Photos



Gives best view to verify old lighting and new lighting in 1 picture.





Qualified Products

• What is the DLC?

- Design Lights Consortium
- Organization that reviews and approves lighting products.
- Uses guidelines including product quality, energy efficiency and more to approve products.

What is the QPL?

- Qualified Products List
- Pre-selected equipment that meets our eligibility requirements.
- Loaded into Snapshot to make reviews quicker.
- Separate lists for lighting and networked lighting controls.
- Eliminates need for spec sheets.





Equipment Requirements



You have 0	saved items	Search by model, manufacturer, brand, product ID, or family ID	
Save Search Criteria	View Saved Searches	Search Tip: For an exact search, use quotes around the search term (ex. "PVO5LXDK").	
Listed Products	~	Prev 1 2 3 4 5 12254 12255 Next	
Technical Requirements	Version –	Active Filters Image: Technical Requirements Version: 5.1	

There are eligibility requirements for equipment as well!

- DLC Qualified Product Lists (QPL) are in place for lighting project equipment selection
 - DLC 5.1
 - New implementation for SBDI channel.
- All Program applications have equipment eligibility requirements listed.
 - Applications can be found on Program Website.
 - www.amerenillinoissavings.com/business-forms-library/
 - SBDI PY24 measure list can be found in the Reference Library in Energy Snapshot.
- All equipment used for projects must meet all eligibility requirements in order to receive incentives.
- If you have any questions or concerns reach out to your Energy Advisor or contact the Call Center.

- 1.866.800.0747

DLC Demonstration

- Why it matters?
- Not every lighting opportunity for a specific project may have an applicable measure. Some items in the DLC will not qualify for incentives through our Program:
 - o Don't meet efficiency standards.
 - General regulatory driven by the Illinois TRM.
 - Delisted products.
- Live Demo
 - o Searching material
 - Listed
 - Not listed
 - Product ID
 - o Category





QPL Demonstration

- SBDI Qualified Products List (QPL)
 - Routinely updated
- Using the QPL
 - Networked Lighting Controls vs. Fixtures and Lamps.
 - Preload your preferred products if not QPL listed.
 - Be as accurate as possible during initial assessment to reduce delays.
 - Fixture changes can easily occur if QPL items are selected.
 - Reach out to <u>SmallBizIL@Ameren.com</u> for project changes/unlock with reason.
- No spec sheets needed for QPL products.
- Live QPL Demo >>

Select DLC Lighting Option

Server pre right			
Brand: Model: Type: Lumens: WattsEE: Mfg: Product ID:	Hera Lighting EL12-LED/DIM 5000K Linear Ambient 684.7 5.000 Hera Lighting L.P. PY5QUJJ0		
Brand: Model: Type: Lumens: WattsEE: Mfg: Product ID:	Lumark TCR55M-[All Colors] Low Output 552 5.000 Cooper Lighting Solutions P8738XR6	(formerly	Eaton)
Brand: Model: Type: Lumens: WattsEE: Mfg: Product ID:	Lumark TCRSSM-[All Colors]-7030 Low Output 533 5.000 Cooper Lighting Solutions PK3QGFMS	(formerly	Eaton)
Brand: Model: Type: Lumens: WattsEE: Mfg: Product ID:	Lumark TCR55M[All Colors]-7050 Low Output 552 5.000 Cooper Lighting Solutions PDU2LBRP	(formerly	Eaton)
Brand: Model: Type: Lumens: WattsEE: Mfg: Product ID:	Lumark TCRS5S-[All Colors] Low Output 530 5.000 Cooper Lighting Solutions POR3KKF8	(formerly	Eaton)

The goal of the QPL is to streamline project processing and payment.

Adding New Items to QPL



- Why would I add an item?
 - Parent product listed but child is not.
 - Product recently became DLC listed.
 - Speeds up processing.
 - Provides more accurate incentive estimates.



- Propose models to customers you can be confident will qualify.
- How to add items that are DLC but not on the QPL.
 - Reach out to <u>SmallBizIL@Ameren.com</u> for adding new items into the QPL.
 - Provide spec sheets and DLC Product ID individually (*verify item isn't already in QPL*).



Incentive Changes

Mike Thompson, Small Business EA Manager

309-213-0336 mthompson2@ameren.com

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PY2024 Incentive Changes



SBDI (Small Business Direct Install)

Measure	PY2023 Incentive	PY2024 Incentive	Change
SBDI Door Heater Controls for Cooler/Freezer - (Anti-sweat)	\$100	\$150	\$50/Door controlled increase
SBDI EC Motors for Walk-in cooler/freezer	\$180	\$200	\$20/Motor increase
SBDI Q-Sync motors for reach-in coolers and freezers	\$150	\$175	\$25/Motor increase
SBDI Networked Lighting Controls with some/unknown LLLC	\$1.25	\$0	Removed in place of new NLC/LLLC measures below
SBDI Networked Lighting Controls - Without LLLC	\$0	\$0.50	Cap at \$75/Fixture
SBDI Networked Lighting Controls - With LLLC	\$0	\$1.50	Cap at \$75/Fixture

PY2024 Incentive Changes



Incentives change, are added, or removed for various reasons:

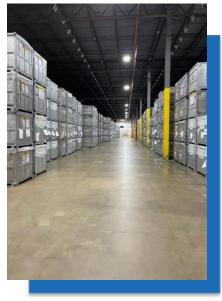
- Modifications in code requirements or local/state/federal regulations.
- Adjustment in Technical Review Manual (TRM).
- New or Outdated technologies.
- Effective cost of savings.
- Program budget availability.

This is an ongoing process.

- Incentives are subject to change at any point during the Program cycle.
- Measures can be added or deleted.
- Notification and lead time will be provided as available.

Not all incentive levels have changed.

- If not mentioned today, they have not changed.
- List of current measures and incentives is posted in Snapshot Reference Library.





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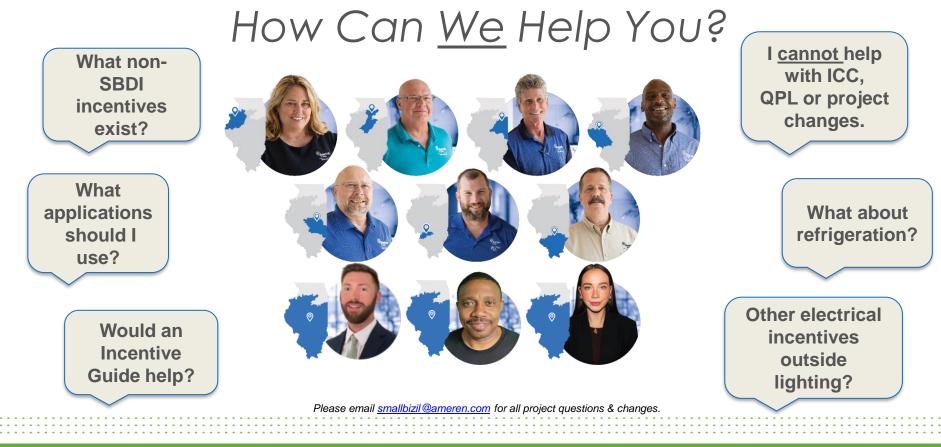
SBDI Support

Shane Perry, Deputy Business Program Manager



Field Support





Contact Support



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Online: www.AmerenIllinoisSavings.com/Business



Non-SBDI Documents/Apps: www.AmerenIllinoisSavings.com/Forms



SBDI Documents: Snapshot Reference Library www.sbdi.2024.staplesenergy.com





Customer Support: 1.800.232.2477 (account #, other ?'s)











Recap

- Clarification on roles and communication with Program staff.
- Faster turnaround time when processes are understood and followed "Speed to Check".
- ✓ Less back and forth communications with processing teams.
- Accurate assessments to final invoice without scope changes are the best path for fast processing.
- ✓ Quality photos for existing and final (the more the better).
- We strive to make the process as easy as possible while adhering to requirements.
- ✓ SBDI has the *best incentives* for Business in the region!





What's Next?

- Announcements will be posted via Snapshot Pop-up messaging and email.
- Some trainings to be mandatory to maintain payment status.
- Measure specific trainings to come in PY2024.
 - Survey additional trainings: Refrigeration, Weatherization, LLLC, Boilers, etc
 - o Survey training format: In-Person, Webinars, Recorded Video, Manufacturer seminars
- Quarterly webinars with Q&A ongoing to streamline communications.
- Thank you for your ongoing participation and engagement!







Energy Efficiency PROGRAM

AmerenIllinoisSavings.com