



# Custom Competitive Large Incentive Project (Custom CLIP) Application

### Does your facility qualify?

- Non-residential facility.
- 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.
- Gas projects: gas delivery service rate GDS2, GDS3, GDS4, GDS5, or GDS7 and Gas Energy Efficiency Programs Charge on Ameren Illinois gas bill.

### Does your project qualify?

- Projects eligible for incentives under the Custom Competitive Large Incentive Project offering include electric or gas energy-efficiency measures with total energy savings over 200,000 kWh and/or 10,000 therms. Payback must be less than fifteen years. There is no minimum payback requirement.
- The incentives offered through the Ameren Illinois Energy Efficiency Programs are intended to support the installation of energy efficiency projects that require the installation of new, premium-efficiency or high-performance equipment. All equipment must meet minimum performance criteria, as listed on the application form, to be eligible for incentives.
- Lighting projects replacing T12 Lighting are not eligible for the Custom CLIP Application. Please see the Standard Lighting Application.

### Effective Dates

- September 30, 2021: Application submittal deadline
- November 15, 2021: Award notices sent (complete and thorough project submissions may receive an early award letter)
- January 31, 2022: Corporate commitment letter submission deadline
- March 31, 2022: Evidence of project execution (POs) due
- October 31, 2022: Complete projects with final paperwork submitted by November 30, 2022

\*Projects with 2022 completion date are contingent upon the approval of budgets and structure of the Ameren Illinois Energy Efficiency Program for Program Years 2022 through 2026.

Early Completion Bonus Amounts		
Completion by Mar 31, 2022	Completion by June 30, 2022	Completion by Sept. 30, 2022
15%	10%	5%

### What you should know before beginning:

- Pre-approval is **required** before any commitment to project installation or purchase is made (including generating purchase orders). Do not purchase your equipment until receiving a pre-approval letter. All required documentation must be received by the program within 30 days of project completion.
- For incentives over \$500,000, incentives will be reduced to be prorated for the savings that are over 2,500,000 kWh at a rate of \$0.06/kWh (contingent upon budget availability). For example, if a project achieves 6,000,000 kWh in savings, the base incentive will be capped at 2,500,000 kWh \* \$0.20/kWh (private sector) + 3,500,000 kWh \* \$0.06/kWh. Incentives are always contingent upon available budget.
- Stockpiles of equipment are not allowed: all equipment must be installed and operational.
- Final application paperwork is due within 30 days of project completion **or by November 30, 2022, whichever comes first.**
- Bundling of measures are allowed (Standard & Custom), however Instant Incentives, Retro-Commissioning, & Leak Survey & Repair are excluded from this Custom CLIP offering.
- Ameren Illinois will pay no more than 85% of the incremental cost to the Customer of purchasing the Energy-Efficiency Measure (EEM), or the pre-approved incentive 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 \$0.035\*annual kWh usage on electric incentive and \$0.25\*annual therm usage on gas incentive (or for Public Sector and DS2/GDS2, if the incentive exceeds \$0.055\*annual kWh usage on electric incentive and \$0.50\*annual therm usage on gas incentive). A completed supplemental [CLIP HVAC 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.
- Measures must be (1) self-installed by an employee of the Ameren Illinois customer listed on this application, or (2) installed by an Illinois Commerce Commission-approved Certified Installer to qualify for an incentive. Certification of the self-installation or evidence of installation by a Certified Installer will be required. A complete list of Certified Installers can be found at <https://www.icc.illinois.gov/utility/default.aspx?type=28>.

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Please save a copy of this form to your computer and use Adobe Acrobat to complete the document. Most browsers (Chrome, Internet Explorer, Safari) do not auto-fill calculations.

## Incentives and Requirements

- Electric measures - Up to \$0.20/kWh saved/year
- Gas measures - Up to \$1.00/therm saved/year (Private) & \$2.00/therm saved/year (Public)

## Project Evaluation Criteria

Projects are evaluated based on the following criteria:

- Requested incentive level vs. energy savings (lower incentive \$/kWh and \$/therm will receive higher ranking); longer measure lives will be scored more favorably.
- Corporate commitment to project implementation contingent upon receiving incentive funds.
- Statement of Need for incentive to conduct the project.
- Completeness and quality of application and supporting documents including energy savings calculations.

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### Instructions

Step 1: Submit this Application and all required documentation by September 30, 2021. You will receive an e-mail confirming we received your application. Upon completion of the technical review, a pre-approval notice will be issued or a program staff member will contact you to discuss other options if your project is not selected for the Custom CLIP offering.

Step 2: Once you have signed and returned the pre-approval letter, purchase and install the proposed equipment. Corporate commitment letter is due on January 31, 2022 and evidence of project execution is due on March 31, 2022. (**NOTE:** if you are considering changes to the scope of work (after receiving pre-approval) it is imperative that you contact a program representative to discuss how these changes will impact your savings/incentive.)

Step 3: As soon as your project is completed, submit a completed Incentive Payment Request Form and all supporting documentation requested. Final Application paperwork is reviewed, if approved your incentive will be paid within 60 days of approval.

Step 4: Program staff may conduct a post installation verification inspection upon receiving final application paperwork.

**Please note:** Detailed, step-by-step instructions, FAQs, and other helpful information are available on the program website in the [Application Guide \(amerenillinoisavings.com/portals/0/business/forms/application-guide.pdf\)](http://amerenillinoisavings.com/portals/0/business/forms/application-guide.pdf). Please contact program representatives with any questions via email at [IllinoisBusinessEE@Ameren.com](mailto:IllinoisBusinessEE@Ameren.com) or call toll free 1.866.800.0747.

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### Project Summary

Summary of proposed measures (briefly describe what will be done and how energy efficiency will be increased). This information may be provided on a separate page.

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## 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: * Ameren Illinois Natural Gas Account Number: *  *Both electric and gas account numbers are required if you are an Ameren Illinois electric and gas customer.	
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	IL	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):  Office Municipal Medical Restaurant Grocery School/College Other (please specify):		If Manufacturing/Industrial, specify type:  Food Processing Automotive/Transportation/Infrastructure Water Treatment Plant 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 application 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. If you received pre-approval, the version of the application that was available at the time you submitted your pre-approval application will apply. If you did not obtain pre-approval, the version of the application that corresponds with the purchase dates of your equipment will apply.

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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 (e.g., compressed air, lighting, VFD, or process improvement)		
B	Electrical Load (total) kW = (W ÷ 1,000)		
C	Estimated Annual Hours of Operation (hours/year)		
D	Estimated kWh/year Used (Row B x Row C) kWh/year		
		<b>INSTRUCTIONS</b>	<b>ANSWER</b>
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	Requested Electric Incentive Rate (\$/kWh)	Up to \$0.20	\$
J	Requested Electric Incentive (\$)	Row F x Row I	\$
K	Cost of Materials* (please provide a quote or proposal to support this value)		\$
L	Cost of Labor – External Labor Only* (please provide a quote or proposal to support this value)		\$
M	Project Cost	(Row K) + (Row L)	\$
N	Payback Period Before Incentive (years) (must be less than 15 years)	Cost / Savings (Row M) divided by (Row H)	
O	Payback Period After Incentive (years) (must be less than 15 years)	(Cost-Incentive) / Savings (Row M) – (Row J) divided by (Row H)	
P	Incentive is What Percent of the Job Cost (Ineligible if less than 10%, capped at 85%)	(Row J) divided by (Row M) 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.

\*\*For incentives over \$500,000, incentives are likely to be reduced from the full incentive rate based on available program budget. Incentive calculations for Custom HVAC projects will be based upon realistic/submitted energy savings, but will be capped if the incentive exceeds \$0.035\*annual kWh usage for electric incentive (or for Public Sector and DS2, if the incentive exceeds \$0.055\*annual kWh usage for electric incentive). A completed supplemental calculator must be submitted with the Custom application.

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GAS PROJECT CALCULATIONS AND INFORMATION			
<i>Make copies of this page if more than one measure is being implemented</i>		EXISTING OR BASELINE EQUIPMENT	NEW ENERGY EFFICIENT EQUIPMENT
A	Description of Measure <i>(e.g., Steam system, process heat system, heat recovery, other process improvements)</i>		
B	Natural Gas Load (total Therms per hour) Therms = (Btu ÷ 100,000)		
C	Estimated Annual Hours of Operation (Hours/Year)		
D	Estimated Annual Therms <i>(Row B x Row C )</i> 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	Requested Gas Incentive Rate (\$/therm)	Up to \$1.00 (Private) Up to \$2.00 (Public)	\$
J	Requested Gas Incentive (\$)	Row F x Row I	\$
K	Cost of Materials* <i>(please provide a quote or proposal to support this value)</i>		\$
L	Cost of Labor – External Labor Only* <i>(please provide a quote or proposal to support this value)</i>		\$
M	Project Cost	(Row K) + (Row L)	\$
N	Payback Period Before Incentive (years) <i>(must be less than 15 years)</i>	Cost / Savings (Row M) divided by (Row H)	
O	Payback Period After Incentive (years) <i>(must be less than 15 years)</i>	(Cost-Incentive) / Savings (Row M) –(Row J) divided by (Row H)	
P	Incentive is What Percent of the Job Cost <i>(Ineligible if less than 10%, capped at 85%)</i>	(Row J) divided by (Row M) 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 \$0.25\*annual therm usage on gas incentive (or for Public Sector and GDS2, if the incentive exceeds \$0.50\*annual therm usage on gas incentive). A completed supplemental calculator must be submitted with the Custom application.

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<b>OPTIONAL ADDITIONAL INCENTIVE FOR WATER SAVINGS</b>			
<b>WATER SAVINGS PROJECT CALCULATIONS AND INFORMATION</b>			
<b>Ameren Illinois Electric Customers Only</b>			
Make copies of this page if more than one measure is being implemented.		EXISTING OR BASELINE EQUIPMENT	NEW ENERGY EFFICIENT EQUIPMENT
A	Description of Water Savings <i>(e.g., reduced boiler make-up water, reduced cooling tower water)</i>		
B	Potable Water Supply Use (gallons per year)		
C	Wastewater Treatment Disposal (gallons per year)		
		INSTRUCTIONS	ANSWER
D	Reduced Potable Water Use (gallons per year)	(difference between the two numbers in Row B)	
E	Reduced Wastewater Use (gallons per year)	(difference between the two numbers in Row C)	
F	Reduced Water Use (Supply and Waste) (gallons per year)	(Row D) + (Row E)	
G	Reduced Water Use (Supply and Waste) (1000 gallons per year)	(Row F divided by 1000)	
H	Additional Custom Incentive (\$)	Row G x \$0.30	\$

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## 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).
- 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 \$200,000 per project for GDS2 and public sector customers and capped at \$100,000 per project for all other customers.
  - 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



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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.

**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)**



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## 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 (p. 2 of the application)

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.*

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

Attach 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.**

### 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 [AmerenIllinoisSavings.com/forms](http://AmerenIllinoisSavings.com/forms).

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

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

### Additional Requirements

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 by January 31, 2022.

Submission of documentation clearly demonstrating the project has commenced by March 31, 2022.

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.

## 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: (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.*

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REQUIRED PROJECT DOCUMENTATION
<p><i>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 <u>that must accompany your application.</u></i></p>
PROJECT SUMMARY
<ul style="list-style-type: none"> <li>• Include a summary of proposed measures (briefly describe why you are proceeding with this project and what will be done.)</li> </ul>
EQUIPMENT DOCUMENTATION
<ul style="list-style-type: none"> <li>• A list of equipment and components to be installed, including manufacturers' catalog/model number.</li> <li>• Manufacturers' specification sheets for all major components.</li> </ul>
ENERGY PERFORMANCE AND OPERATIONAL SEQUENCE REQUIREMENTS
<ul style="list-style-type: none"> <li>• 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 in electronic format using spreadsheet or computer modeling analysis are preferred.</li> <li>• Each individual system type (lighting, motors, etc.) should have a separate calculation table analysis.</li> <li>• All assumptions such as operating hours, existing and proposed equipment, and operational details must be presented.</li> <li>• List of system requirements (pressure, flows, etc.), operating hours, and control strategies.</li> </ul>
SYSTEM PERFORMANCE RELATED TO STANDARD PRACTICE
<ul style="list-style-type: none"> <li>• To be awarded an incentive under this program, proposed process systems and equipment must outperform accepted standard practice. Standard practice can be defined as systems, equipment, and operational approaches based on readily available equipment that is commonly installed today.</li> <li>• The base case or standard practice systems should be compared to proposed systems that serve a similar function with like capacity. Please supply information documenting the accepted standard practice for the process and demonstrate how the project will outperform standard practice.</li> </ul>
OTHER REQUIREMENTS AND COMMENTS
<ul style="list-style-type: none"> <li>• Please provide any measured data wherever possible.</li> <li>• Copy of bids to show how project cost was determined (outside labor and materials).</li> <li>• For lighting projects, a list with the following information is required: existing fixtures - quantity, watts per fixture, lamps per fixture, and ballast information; new fixtures or retrofitted fixtures - quantity, manufacturer, model number, watts per fixture, lamps per fixture, and ballast information.</li> </ul>
CORPORATE COMMITMENT LETTER - TO BE SUBMITTED UPON RECEIPT OF AWARD LETTER
<ul style="list-style-type: none"> <li>• Send your letter to the address (fax/e-mail) listed at the bottom of this page.</li> <li>• Customer name and location. Customer contact information.</li> <li>• Assigned Project Number.</li> <li>• A statement regarding the level of corporate commitment to the funding and implementation of this project.</li> <li>• Must be submitted no later than January 31, 2022.</li> </ul>
EVIDENCE OF PROJECT EXECUTION - TO BE SUBMITTED UPON RECEIPT OF AWARD LETTER
<ul style="list-style-type: none"> <li>• Submit documentation that work has begun on the projects approved for Custom CLIP incentive money. Acceptable documentation includes: purchase orders, work orders, invoices, receipts, etc.</li> <li>• Must be submitted no later than March 31, 2022.</li> </ul>

# Custom Competitive Large Incentive Project (Custom CLIP) Application

## Incentive Request Justification Form

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 Custom CLIP applications, and the need for incentive funding to complete the project will factor into the competitiveness ranking of your application.**

Please take a moment to document 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. To document the need for the requested financial incentive amount, it can be useful to include information such as previous funding denials for the project or ROI thresholds that need to be met within your organization. If you would like assistance in completing this form, please feel free to contact the program.

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

# Custom Competitive Large Incentive Project (Custom CLIP) Application

Tables 3 and 4 of this form must be completed by the Ameren Illinois Customer

Table 3: Impact Questionnaire	
Without the requested incentive funds, this project would not be completed because _____	
_____	
_____	
_____	

Table 4: Large Project Participant Survey	
<b>Item 1 – Barrier to Implementation</b>	
Ameren Illinois understands that energy savings is just one of the many potential benefits of a project. Please identify up to 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 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 Competitive Large Incentive Project (Custom CLIP) Application

Large Project Participant Survey(continued)	
<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):	

## Incentive Request Justification: Customer Acknowledgment and Signature

I certify that all information in Table 3 and Table 4 is correct and complete to the best of my knowledge.

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

**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.*

# Custom Competitive Large Incentive Project (Custom CLIP) Application

## 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.

### 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/utility/default.aspx?type=28>).

## 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.*

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