A low-angle, close-up photograph of a person in a white lab coat adjusting a large, white surgical light fixture. The person's hands are visible, and the light fixture has a complex, multi-lens design. In the bottom right corner, the face of a man with a mustache is partially visible, looking upwards. The background is a bright, clinical setting.

Multifamily One Stop Shop
PY2022 Program Ally Orientation
February

Welcome

Introduction & Objective



Thank you for joining the Ameren Illinois Energy Efficiency Program and enrolling in the Multifamily One Stop Shop Initiative as a Program Ally.

- This orientation webinar is offered to all participating PY22 Multifamily One Stop Shop (OSS) Program Allies to:
 - Refresh their knowledge of the Initiative's standards and offerings
 - Educate them on new offerings and policies
 - Review the processes and procedures
 - Relay all the opportunities to help Ameren Illinois customers with energy efficient upgrades to their facilities

Boxes like this will appear throughout the training as reminders or highlights to keep in mind while participating in the Multifamily OSS.

Multifamily Energy Advisors (EA)



- These are the professionals available to you for questions regarding Program guidelines and individual project issues
- Multifamily EA are your first point of contact with the Program for all project and Program-related questions
- Please reach out to the EA in your area if you have questions
- Ron Siddle is the Program Manager and will review all applications prior to submission to the Residential Program inbox

Program Manager: Ron Siddle

rsiddle@cmcenergy.com

1.618.570.9783

1. Robert Tortat

rtortat@cmcenergy.com

1.309.339.5802

Hilario Hernandez

hhernandez@cmcenergy.com

1.309.648.9046

2. Jeff Eccles

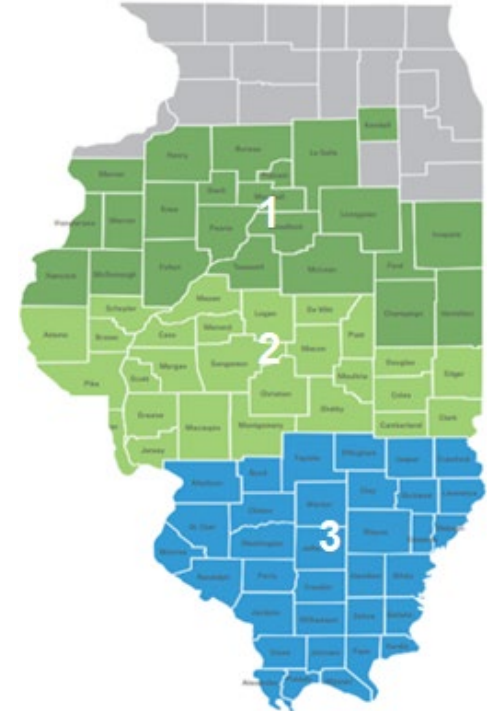
jeccles@cmcenergy.com

1.773.418.0096

3. Richard Rockett

rrockett@cmcenergy.com

1.314.265.1502



Field Energy Specialists (FES)

- A Field Energy Specialist may be on-site for building envelope pre-work and post-work testing verification
- You must coordinate testing with the appropriate Field Energy Specialist to the area of the project, unless instructed, in writing, otherwise
- Please copy your Multifamily Energy Advisor on these communications

1. Micheal Edwards
medwards5@ameren.com
1.309.714.1929
2. Matt Flowers
matthew.s.flowers@leidos.com
1.217.821.1111
3. Tim Huber
tim.huber@leidos.com
1.314.302.2919
4. Tucker Blum
tblum@ameren.com
1.309.857.9773



Multifamily One Stop Shop Initiative

Helping Program Allies Help Customers



The Ameren Illinois Energy Efficiency Program provides multifamily properties and renters with energy efficiency retrofits and upgrades, providing benefits for both the property and resident for many years to come.

Building envelope upgrades that will last in the residence for greater than 15 years of durability.

High efficiency heat pumps in replacement of existing electric resistant heat units.

FREE in-unit energy saving products like smart thermostats, LEDs, advanced power strips, shower heads, aerators, and weatherization measures.

Education for the property owner, residents, and maintenance staff will improve the comfort of the home, manage usage, and reduce cost.

Assessment and referrals to other Program Initiatives.

Multifamily One Stop Shop Initiative

Program Ally Requirements

- Obtain and remain in good standing as an Ameren Illinois Energy Efficiency Program registered Program Ally
- Maintain annual certification with the Illinois Commerce Commission (ICC)
- Acknowledged Health & Safety Plan on-file
- Additional training that may be required:
 - Fuel Distribution System Inspection Procedure: 30-minute video
 - Application and Document Training: coordinated and administered by field staff
 - Ducted/Ductless Heat Pump Measure orientation
 - Health and Safety Measure Training

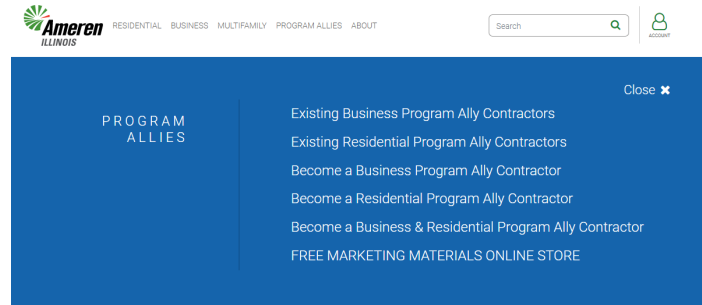
ICC annual certification must be renewed by June 1 every Program Year.

Program Ally Website

Up-to-Date Documentation & Announcements

- Throughout this orientation, you will note references to “the website” - a resource for documentation and updates which is located at **AmerenIllinoisSavings.com**
- After navigating to the Existing Residential Program Allies Portal, you will be prompted for two things:
 - **Username:** programally
 - **Password:** saveenergy
- **Note:** Multifamily has its own section

Bookmark this website for quick reference.



Resources For You

The Program Ally Portal provides you with valuable information, including project documentation, training, co-branding, guides, and contact information. Please check the Program Ally Portal often for the latest information.

Program Ally Portal

Applications



Multifamily

▾ Applications

- Multifamily HVAC Workscope
- Multifamily Building Envelope Workscope
- Multifamily Property Assessment Request

▸ Multifamily Energy Advisor Map

Multifamily One Stop Shop Initiative

Property Qualifications

- Property must be a minimum of three individual units under the same ownership

What can that look like?

- Properties can be a variety of apartments, duplex, triplex, etc.
 - For example: property management groups or PHAs with multiple types of rentals
- Properties can be a condo building, student apartment housing, a shelter, or residential building for people with disabilities
- Properties can be a mixed-use building (retail or office with residential) with a minimum of 3 rental units

What if the property is master or commercial account?

- Many properties roll utility costs into rent, so there may not be a residential account for the address
- Program Staff are available to help you navigate utility accounts and eligibility

Multifamily One Stop Shop Initiative

Multifamily Eligibility Types: Incentives are Based on Eligibility

- Public Housing (PH)
 - All units must be owned or managed by a Public Housing Authority
- Income Qualified (IQ)
 - Property must be able to show participation in a government rental assistance program (ie: Sec 8, Sec 515, 550, etc), participating in an income qualified assistance financing program such as USDA, LITC, LIHTC, RAD; or receiving federal disaster assistance
 - If no documentation can be provided, the property will be qualified according to IL Policy manual standards based on regional HUD average rent levels, address in a HUD or other recognized Qualified Census tract, or by average tenant income levels (less common)
- Market Rate (MR)
 - Properties that are not eligible under PH or IQ qualifiers are designated as Market Rate

**Unsure of eligibility?
Program Staff are always available to help with
eligibility questions.**

Multifamily One Stop Shop Initiative

Eligibility

- Property eligibility and incentive levels are established with information provided when a property completes the Energy Assessment Form
- Property Representatives complete the **Request a FREE Energy Assessment** form on ***AmerenIllinoisSavings.com/MultifamilyProperty***
- Property Representatives will answer questions about their property that will let the Program qualify them quickly
- Having your customer complete the Energy Assessment form and list your company as the referring Program Ally is the easiest pathway into the Program - this will trigger Program Staff to reach out to the Program Ally directly to provide the OSS # and assist with the application process
- If Program Staff do not reach out to you within a few days and you know the customer has submitted the Energy Assessment form, call your EA and they will provide the information to you

Health & Safety Measures Guide

Specifications for Residential Program Health & Safety Measures



RES-HSM-22 Residential Health & Safety Measures Guide for PY22

Description: The intent of this document is to provide information regarding the Health & Safety related measures that are considered allowable costs as part of an eligible energy efficiency project within the Ameren Illinois Residential Energy Efficiency Programs. This guide provides objectives as well as initial and final conditions expected for each listed measure. Reference to supplemental Program guidance such as the Health & Safety Field Guide and applicable White Papers may be required for further definition on listed items.

All measures are required to be installed by a registered, active, and qualified Program Ally or Program Ally approved sub-contractor unless otherwise noted.

[\[Program Ally Portal\]](#)

Expectations of a Program Ally

Customer Experience



Manage

Manage projects to be completed in a consistent and timely fashion

Maintain

Maintain effective communication with customers to ensure a positive and well-informed customer experience

Communicate

Maintain effective communication with your MF EA

- Ask questions - they are available to assist you
- Seek assistance early if issues arise
- Keep them up to date as projects exceed desired or stated timeframes

Multifamily Properties

Special Considerations



- Requirements for rental property notices to tenants – property staff is required to notify tenants no less than 24 hours in advance prior to entry into units
- Public Housing may be required to complete a formal Request for Bid process, even on projects where there might be not be a copay
 - Program Staff are available to assist in navigating this process and coordinating with the Public Housing Authority leadership
 - Decision on selected contractor is solely from the Property
 - Certified diverse, woman-owned and veteran-owned contractors may be given special consideration

- Health and safety considerations: COVID-19
 - Many properties are seniors or persons with disabilities, please be cognizant of their concerns
 - Each tenant unit to be entered should provide attestation at the door of the health and safety questions prior to Program Ally Staff entering the unit
 - Contact tracing documentation should be gathered from all tenants where Program Ally staff is entering tenant units
 - Communication with property staff and Program Staff to address or document tenant concerns or refusal for entry

Multifamily One Stop Shop Initiative Project Requirements

Incentivized Measures



Energy Efficiency Measure	Incentive (unit)
Air Sealing (required for building envelope projects) (MF-IQ and PH only)	\$0.60 (per CFM reduced)
Attic Insulation (existing R-19 or less) (MF-IQ and PH only)	\$1.00 (per square foot)
Air Source Heat Pump replacing Electric Resistance Heat (MF-IQ and PH)	\$7,500.00 (per installed unit)
Air Source Heat Pump replacing Electric Resistance Heat (MF-Market Rate)	\$5,000.00 (per installed unit)

Measure Requirements

Initial Conditions for Multifamily Retrofit Projects

Building Envelope Measures

- Air sealing must be able to be performed
- Existing attic insulation must be R-19 or below and be able to be increased to R-49 or greater

HVAC Measures

- Air Source Heat Pump
 - Primary heating source: electric resistance
 - Primary cooling source: no cooling source, CAC, or window/wall air conditioning units
- Consult your Multifamily EA for information on additional HVAC and Water Heater measures that may be available

Please consult the Available Residential Measures Guide, located at AmerenIllinoisSavings.com, for further details regarding these measures.

Multifamily Project Incentives Determinations



Measure	Initial (Pre-Project)	Final (Post-Project)
Air Sealing	Blower door test in depressurization mode	Blower door test in depressurization mode showing infiltration reduction
Attic Insulation	R-19 or less	R-49 or greater
Air Source Heat Pump	Electric resistance heat with or without cooling	Ducted or ductless ASHP 16 SEER and 9 HSPF minimum

Requirements – Building Envelope

- When a single level duplex, triplex, quadplex is identified as eligible, all units in the structure must be eligible unless there is complete separation of units
 - A fire-wall extending from roof line to foundation generally allows a unit to be considered separate from its neighbor(s)
- All available measures that protect indoor air quality and guard against moisture concerns must be included on the proposed scope of work, which include:
 - Crawl space vapor barrier (sealed at all seams, pillars and foundation walls)
 - Necessary air sealing measures (to include the entire attic plane)
 - Termination of all moisture venting sources outside the building shell (ducting insulated to **R-7** if outside the thermal envelope)
 - Fuel Distribution System Inspection
 - Combustion Safety Testing
- Consult your EA to see if the unit must adhere to ANSI/BPI 1200 standards

Multifamily Building Envelope Project Test Requirements



- Infiltration testing CFM@50 (for projects that include building shell measures)
- Combustion Safety Testing
- Fuel Distribution System Inspection
- Health & Safety Inspection
- It is recommended that all Program Allies wear personal CO monitors in all homes

Requirements – Heating and Cooling

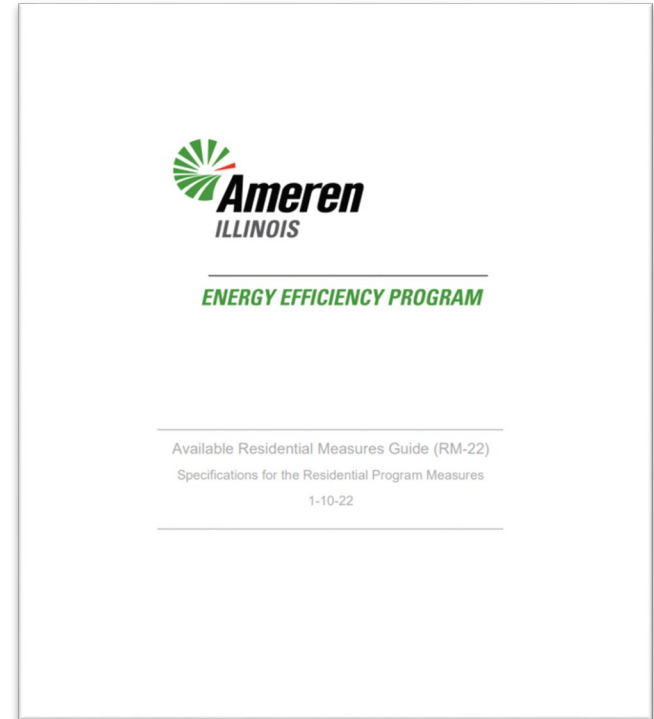
- Primary heating source: unit must have electric resistance heat
 - May be ducted or ductless
- Primary cooling source: units may have no cooling source, CAC, or window/wall air conditioning units

Note: neither a CORE Program Ally nor building envelope project are required for a Multifamily HVAC project to proceed

Initiative Guidelines

Reference Document

- Available Residential Measures Guide describes what measures are available in a Program Year, initial and final conditions for each measure, and approved materials (or ratings for materials)
- Field guides inform on acceptable installation techniques for the approved materials and provides listing for materials not covered in the Available Residential Measures Guide



Multifamily One Stop Shop Initiative Health & Safety Requirements

Health & Safety Measures

Overview

Work That Qualifies

- Program funded retrofit work that protects the health and safety of the occupant, their family, as well as our Program Staff
- Considered allowable costs as part of an eligible energy efficiency project
 - Single Family
 - Multifamily Properties

Everyone Deserves a
Healthy and Safe
Home



When is Health & Safety Related Work Allowable



1. When necessary to remove a barrier to an energy efficiency project
 - a) Items listed on the Health & Safety Measures List are allowable
 - b) An energy efficiency project must also be completed

2. Costs for all health and safety-related work required for the project to move forward are as follows:
 - a) Multifamily PHA/IQ up to \$300 per unit/no greater than 50% of total project cost
 - Property owner will be responsible for costs above the cap

3. Health and safety measures that are not removing project barriers, but are still critical to the project may be allowable, discuss with your FES

Multifamily Paperwork and Submission Requirements

Viable project with identified health and safety measures that you will be able to complete to create meet viable project criteria...

- Communicate with your Multifamily EA

- Submit Program-approved forms to document all attempted test in information and identified health and safety measures

- Submit Program-approved forms to document all concerns:
 - Completed Multifamily Building Envelope or HVAC Work Scope
 - Other supporting documents:
 - Including OSS #, all fields completed, your signature and customer signature
 - Completion of Health & Safety and Combustion Safety worksheet tabs
 - Include photos of completed health and safety work with descriptions of location (building/unit or common area location) on each photo

- Submit via email to rsiddle@cmcenergyservices.com

- Multifamily Program Manager will submit to the Residential Energy Efficiency Program inbox for Program review

Multifamily Health & Safety Submission Requirements


Viable project that you will be able to complete necessary health and safety measures...

- Communicate with your Multifamily EA

- Submit Program-approved forms to document all concerns
 - Completed Multifamily Building Envelope or HVAC Work Scope
 - Work Scope required documents:
 - Building envelope unit details
 - HVAC unit details
 - Other supporting documents:
 - Combustion Safety Form
 - Health & Safety Costs Information Form
 - Health & Safety - PY22 Pricing
 - All project assessment final conditions documentation completed, your signature and customer signature on the Work Scope incentive request page
 - Include photos of completed health and safety work with descriptions of location (building/unit or common area location) on each photograph

- Submit via email to rsiddle@cmcenergyservices.com

- Multifamily Program Manager will submit to the Residential Energy Efficiency Program inbox for Program review

Energy Efficiency Program		
MF IQ and PH Health and Safety Costs Information Form		
Please complete all required information and submit this form as an attachment to the Reservation Request.		
CUSTOMER AND PROGRAM ALLY INFORMATION		
Reservation #:		OSS #:
Not Applicable <input type="checkbox"/>		
HEALTH AND SAFETY COSTS INFORMATION		
Location	Health and Safety Measure	Cost
	Vapor Barrier	
	Vent Exhaust Fan Outside	
Health and Safety Items Total:		\$0.00
General Notes:		



Multifamily Health & Safety Paperwork and Submission Requirements

Incentive Request for Remediation Projects

- Submit the following via email to rsiddle@cmcenergyservices.com for application quality check and submission to Residential Energy Efficiency Program inbox
- Completed Multifamily Building Envelope or HVAC Work Scope
 - All project assessment final conditions documentation completed, your signature, and customer signature on the Work Scope incentive request page
 - Include photos of completed health and safety work with descriptions of location (building/unit or common area location) on each photo
- Invoice showing all related work and installed equipment documentation and costs
- Remediation project incentive request process can be followed when health and safety measures in a whole building (for all units in that building if applicable) are completed and for each building within the scope of work
 - Original Program Ally may be given approval to proceed following a completed remediation project in each building if Program approval to proceed is given – Multifamily Project Manager will coordinate project opportunity moving to a Reservation Request Approved status
- This process can be followed when health and safety measures are completed during the project

Multifamily Health & Safety Paperwork and Submission Requirements

Viable project that you **will not** be able to complete the necessary health and safety measures to create meet viable project criteria...

- Communicate with your Multifamily EA

- Submit Program-approved forms to document all attempted Assessment information and identified standard project and health and safety measures

- Submit Program-approved forms to document all concerns:
 - Completed Multifamily Building Envelope or HVAC Work Scope
 - Other supporting documents:
 - Including OSS number, all attempted testing information, health and safety measures information and your signature
 - Non-viable project information
 - Include photos of completed health and safety work with descriptions of location (building/unit or common area location) on each photo

- Submit via email to rsiddle@cmcenergyservices.com

- Multifamily Program Manager will submit to the Residential Energy Efficiency Program inbox for Program review

Multifamily Health & Safety Remediation Project Coordination



Key Metrics to be Captured

- Completed Building Envelope or HVAC Work Scope
 - Health & Safety Costs Information Form completed (available within Work Scope document)
 - Combustion Safety Form completed (available within Work Scope document)

Program Coordination of Remediation Subcontractor

- FES will be notified by the Multifamily Program Manager of possible remediation project and if approved, will coordinate a remediation subcontractor from start to completion within 2 to 4 weeks
- The remediation subcontractor will send a pre-approval email to the FES to include the following:
 - Multifamily Work Scope document as appropriate including completed Health & Safety Costs Information Form
 - Photos with descriptions
 - Proposal on company letterhead with detailed description of work to be completed with itemized costing (or pre-approved equivalent)
 - Signed by the remediation subcontractor and the property representative
- Submitted to rsiddle@cmcenergy.com for review and submission to technical review

Multifamily One Stop Shop Initiative Project Submission Process

Project Process Overview

- Program Staff are available to help coordinate communication with properties and remove participation barriers
- Program Ally conducts pre- and post-work test out for building envelope projects
 - Please coordinate with Program Staff to be on-site during these inspections
- OSS # and property representative signature is required with the initial Work Scope submission
- Send the completed initial Work Scope submission to rsiddle@cmcenergy.com
- Program Ally completes all necessary work outlined in Work Scope
- Property signature is also required with final submission for incentive payment request
- Send the final submission to rsiddle@cmcenergy.com for review and submission of the incentive payment request
- Program Staff will coordinate with Program Ally

Terms & Conditions

A Fundamental Reference



- Become familiar with this document and request that the property manager and owner read it thoroughly
- This will accompany many program documents including the Reservations Request and Incentive Payment Request Applications
- Landlord and tenant consent forms are not necessary

AMEREN ILLINOIS RESIDENTIAL ENERGY EFFICIENCY PROGRAM 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. **a) "Ameren Illinois"** shall mean Ameren Illinois Company d/b/a Ameren Illinois. **b) "Program Ally"** shall mean contractors/allies who have met the minimum qualifications established by Ameren Illinois and are allowed to offer program incentives. **c) "Application"** shall mean the Customer or Program Ally completed document used to apply for cash incentives or used for any other approved application specific documentation. **d) "Customer"** shall mean an Eligible Customer who has submitted an Application for incentive money using their Ameren Illinois account number. The Customer abides by these Terms and Conditions upon acceptance of Customer's Application by Ameren Illinois. **e) "Eligible Customer"** shall mean a residential customer of Ameren Illinois, with an active Ameren Illinois-delivered electric or gas account residing in an existing home or new construction. Individually metered residential multifamily units must have prior program approval to participate. Installations performed between January 1, 2019 to December 31, 2019 are eligible for incentives or until incentive funds are exhausted. Equipment and/or materials must be installed by a participating Program Ally at the Customer's address listed on the Application. The Application must be filled out completely and accurately, signed and accompanied by dated copies of the invoices. See the project/measure eligibility for requirements specific to individual incentives. **f) "Program"** shall mean the energy efficiency plan or measure that is the subject of the Application. **g) "Program Manager"** shall mean the Ameren Illinois designee in charge of the Application. **h) "Reservation of Funds"**, when required, shall mean written notification to Program Ally of a pre-approved incentive amount, which Ameren Illinois issues after review Program Ally's request for funds.

2. General – Customer and Program Ally shall abide by these Terms and Conditions; abide by all Local, State and Federal guidelines, applicable laws, building codes, regulations and licensing requirements; and perform work in accordance with customary installation standards, and/or according to manufacturer specifications.

3. Procedures & Reporting – Program Ally shall follow Program procedures of: **a)** verifying eligibility of Customer and work to be performed; **b)** reserving funds from Program in advance of the project commencing; and, **c)** submitting a reservation form and/or Application supplied by the Program for work performed with all required documentation. Program Ally agrees to provide all documentation associated with specified projects for quality assurance. Program Ally must provide necessary supporting documentation of services rendered including invoices and site assessment reports as requested.

4. Independent Contractor – Listing in the Program Ally database does not constitute any endorsement of the Program Ally by Ameren Illinois. Program Ally is an independent contractor participating in the Program and not an employee of, or under contract to, Ameren Illinois or Program staff and authorized Ameren Representatives. Program Ally is not authorized to assume or create any obligation or liabilities, express or implied, on behalf of or in the name of Ameren Illinois or Program staff and authorized Ameren Representatives. Program Ally shall properly represent this to the Customers.

5. Warranty of Work – Program Ally shall provide the Customer a written warranty covering both labor and materials for a minimum of one year from the date the service is performed. All materials installed shall carry the manufacturer's warranty, which will be provided to the Customer. Offers of, and documentation referring to, any applicable extended warranty coverage shall be supplied to the Customer.

6. Quality Assurance – Program Ally will maintain effective procedures for quality assurance as for resolution of Customer complaints or disputes and for response to Customer emergencies. Program Ally agrees to make its quality assurance procedures available to the Program for review and upon request. Only trained and skilled personnel of Program Ally shall supervise any project performed under the Program. All work is subject to quality assurance and verification inspections by Program before incentive payments are paid. Ameren Illinois is the sole authority in determining that the work is complete and eligible for payment, the applicable Program Manager determines Program Ally work is not up to Program standards, upon request from the Program Representative, Program Ally shall make reasonable repairs or corrections to bring such work up to Program standards at no additional cost to the Customer. Program Manager shall have sole authority in determining the necessary remedies to correct faulty work.

7. Pre and 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. Inspections conducted are solely for the purpose of determining Program compliance and are not utility or building code inspections.

8. Incentive Payment Limits – For all Applications, Ameren Illinois is not obligated to award any incentive payment unless a reservation form and/or Application is submitted and granted. Customer and Program Ally are responsible for ensuring the Application is accurate and equipment meets eligibility requirements in order to receive the Pre-approved incentive payment. Incentive payments will be issued to Program Ally. The Program Ally shall inform Customer of Program financial incentives, and shall include a discount to the Customer in the amount of the incentive, labeled on Customer's invoice as "Ameren Illinois Energy Efficiency Program Incentive."

9. Indemnification – Program Ally and/or Customer hereby release and shall indemnify, hold harmless, and defend Ameren Illinois, Program staff and authorized Ameren Representatives and any third party vendors from any and all claims, losses, harms, costs, liabilities, damages, and expenses (including attorney's fees) of any nature whatsoever arising directly or indirectly out of or in connection with any dispute or legal suit arising from work related to the Program.

10. 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, altering, amending, terminating, or terminating the Program. **b)** In the event of a 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 Program are offered on a first-come, first-served basis and are subject to project and Customer eligibility and the availability of funds.

11. Miscellaneous – Ameren Illinois reserves the right to make changes to its Program, program incentives, rules, guidelines, and these Terms and Conditions upon written notice to the Program Ally. These Terms and Conditions shall be governed by Illinois law.

General Inquiries: Ameren Illinois Energy Efficiency Programs • 300 Liberty Street, 6th Floor, Peoria, IL 61602
Toll-free: 1.888.688.6119 • E-mail: ResidentialE2Applications@ameren.com • Fax: 309.577.7961 • AmerenIllinois@swings.com Page 2 MEP Income Qualified Application 2019 Rev.12

PY22 Workscope Process Changes

Building Envelope and Heating and Cooling



- OSS Assessment Interviews by Program Staff are required prior to project submissions
- Building envelope and HVAC have separate, more streamlined Work Scope documentation
- Signature of property representative or owner is required on all applications prior to project start and again at project completion
- Health and safety documentation and pricing are included within the tabs of the workbook
- All Multifamily Work Scopes are submitted for review to rsiddle@cmcenergy.com
 - After review Program Staff will submit to Residential Energy Efficiency Program inbox

AMEREN ILLINOIS ENERGY EFFICIENCY PROGRAM					
PY2022 IQ Multifamily and Public Housing Workbook - HVAC					
Please complete the application, provide a copy to the customer, attach required documentation and send it to the following email address: rsiddle@cmcenergy.com . All projects will receive a reservation number via email. The reservation number is required prior to project start date. All program paperwork must be submitted within 30 days of the project completion or by December 31, 2022, whichever comes first.					
Reservation Number:		OSS Number:		Channel:	
Section 1: Property Information					
Property Name:					
Mailing Address:		City:	State:	Zip Code:	
Owner/Manager Name:		Title:			
Phone:			Email:		
Ameren Illinois Gas Account:			Ameren Illinois Electric Account:		
Physical Address:		City:	State:	IL	Zip Code:
Number of Tenant Buildings:		Number of Additional Buildings (non tenant residence):			
Number of Tenant Units:	Unit #:	Number of Stories:	Foundation Type:		
Primary Heating Fuel:					
Heating System:			AFUE (if gas):	Manufacture Year:	
Cooling System:			AC Efficiency (Nameplate SEER):	Manufacture Year:	
Section 2: Program Ally Information					
Program Ally Company Name:			Program Ally Contact Name:		
Mailing Address:		City:	State:	Zip Code:	
Phone:			Email:		
Section 3: Energy Efficiency Measure Information					
Measure	Incentive Rate	Quantity	Maximum	Sub-Total	
Ductless Heat Pump - AHRI SEER 16.0, HSPF 9.0	per Unit	Units	n/a		
Air Source Heat Pump - AHRI SEER 16.0, HSPF 9.0	per Unit	Units	n/a		
Health & Safety Total - Health and Safety Cost for each building cannot exceed \$300 per unit served or half of the total project cost:				\$0.00	
				Total Incentive:	
Section 4: Attachments					
Heat Pump Unit Details * Implics					
Section 5: Reservation Request - Customer Authorization of Project					
I, the undersigned, agree that the information above is representative of what has been discussed and proposed by the participating program ally (contractor). I understand that Ameren Illinois program incentives and financing are subject to qualifications and not guaranteed.					
Customer Signature:			Date:		
Program Ally Signature:			Date:		
Section 6: Incentive Payment Request - Acknowledgement of Project Completion					
I certify the information I have provided is true and correct and any work performed meets the program guidelines and Terms and Conditions of the					
HVAC Workscope	Heat Pump Unit Details	Health & Safety - Costs	Health & Safety - PY22 Pricing		

PY22 Multifamily – Funding Opportunities for Energy Efficiency Projects



Resources for Program Allies to Share with Customers

- Incentives may not cover all additional work needed for Building envelope and HVAC upgrades
 - Federal dollars are available for energy efficiency to both small and large properties
 - Our Program website has links to various grants, low interest loans and tax rebate resources that Program Allies can encourage properties to pursue
 - ***AmerenIllinoisSavings.com/Multifamily***
- [Rural Development/USDA Grants and Loans](#)
Rural Energy for America Program Renewable Energy Systems and Energy Efficiency Improvement Guaranteed Loans & Grants
 - [Illinois Housing Development Authority](#)
Applying For Tax Credits Or Other Multifamily Housing Programs to fund Energy Efficiency Property Improvement Projects.
 - [ENERGY STAR – Energy Efficiency Grants and Tax Rebate Information](#)
The Department of Energy State Incentives – The Department of Energy’s database of incentives contains the largest and most up-to-date listing of state, federal, local, and utility incentives and tax rebate policies that support energy efficiency projects.
 - [Database of State Incentives for Renewables & Efficiency® \(DSIRE\)](#)
Is the most comprehensive source of information on incentives and policies that support renewable energy and energy efficiency projects in the United States.

Multifamily One Stop Shop Initiative

Project Quality Control

Pre-Work: Building Envelope Only

Photo Recommendations

- Consult with your EA as to the requirement for our Program Staff to be present during the “test-in” of projects with building envelope measures prior to reservation of incentive funds
- Photographs of existing insulation levels (at least 3)
 - General attic condition photos
 - Photos of insulation levels with tape measure to display depth
 - Photo taken level with insulation level
- Photograph of blower door setup
- Photograph of manometer with test results

It is safe to plan that Program Staff will need to be on-site for all project test-ins, please coordinate appropriately.

Pre-Work

Pre-Work Test-In Expectations

- Fuel distribution system inspection
- Combustion safety testing
- Attic insulation level and grading
- Infiltration testing at 50 Pascals of depressurization
- All items documented on Program forms
- **Reminder:** Program Staff required on-site for test-in



Building Envelope - Building Details			
Reservation Number:		OSD Number:	
Air Sealing - Measurements taken with a blower door test. Units to be cubic feet per minute (CFM) at 50 pascals (50CFM)			
Location:	Pre CFM50:	Post CFM50:	Reduction:
Location:	Pre CFM50:	Post CFM50:	Reduction:
Location:	Pre CFM50:	Post CFM50:	Reduction:
Location:	Pre CFM50:	Post CFM50:	Reduction:
Location:	Pre CFM50:	Post CFM50:	Reduction:
Location:	Pre CFM50:	Post CFM50:	Reduction:
Location:	Pre CFM50:	Post CFM50:	Reduction:
Total CFM Reduction:			
Attic Insulation - Blown Cellulose, Blown Fiberglass, or Spray Foam are the only approved materials			
Depth of Existing Insulation (inches):		New Insulation Type:	
Location:	Pre R-Value:	Post R-Value:	Area (sqft):
Location:	Pre R-Value:	Post R-Value:	Area (sqft):
Location:	Pre R-Value:	Post R-Value:	Area (sqft):
Location:	Pre R-Value:	Post R-Value:	Area (sqft):
Location:	Pre R-Value:	Post R-Value:	Area (sqft):
Location:	Pre R-Value:	Post R-Value:	Area (sqft):
Location:	Pre R-Value:	Post R-Value:	Area (sqft):
Location:	Pre R-Value:	Post R-Value:	Area (sqft):
Total Insulated Area (sqft):			
Attic Air Sealing Detail - Check all air sealing work completed as part of the work scope			
<input type="checkbox"/>	Top Plates Sealed	<input type="checkbox"/>	Mechanical Chases Sealed
<input type="checkbox"/>	Plumbing Wet Walls Sealed	<input type="checkbox"/>	Attic Level Transitions Sealed
<input type="checkbox"/>	Chimney Penetrations Sealed	<input type="checkbox"/>	Bath Fans Sealed
<input type="checkbox"/>	Recessed Lights Enclosed (Non-ICAT)	<input type="checkbox"/>	Air Barrier Installed Over Open Cavities
<input type="checkbox"/>	Recessed Lights Sealed (ICAT)	<input type="checkbox"/>	HVAC Registers Sealed
<input type="checkbox"/>	Attic Accesses Sealed	<input type="checkbox"/>	Fire Rated Walls Sealed
<input type="checkbox"/>	Drop Soffit Areas Sealed	<input type="checkbox"/>	Knee Wall Transition Bypass Sealed
Notes - Describe any unusual conditions:			

Multifamily Building Envelope

Project Test Requirements



- Infiltration testing CFM@50 (for projects that include building shell measures)
- Combustion Safety Testing
- Fuel Distribution System Inspection
- Health & Safety Inspection
- It is recommended that all Program Allies wear personal CO monitors in all homes

Post-Work

Photo Recommendations

- Consult with your EA as to the requirement for our Program Staff to be present during the “test-out” of the projects prior to reservation of incentive funds
- Photograph of installed insulation (at least 3)
 - General attic photos
 - Should show termination of fan vents either out gable-end or roof
 - Photo of insulation rulers showing insulation levels in attic
 - Photo of attic access with appropriate damming material used
- Photograph of blower door setup
- Photograph of manometer with test results

It is safe to plan that Program Staff will need to be on-site for all project test-outs, please plan accordingly.

Post-Work

Post-Work Test Out Expectations



- Fuel distribution system inspection
- Combustion safety testing
- Infiltration testing at 50 Pascals of depressurization
- All items documented on Program forms
- **Reminder:** Program Staff may be required on-site during test-out

Discipline Number: _____						OS# Number: _____																																																																													
Section 1: Property Information																																																																																			
Property Name: _____						Building Name: (if)																																																																													
Owner/Manager Name: _____						Title: _____																																																																													
Phone: _____						Email: _____																																																																													
Section 2: Program Ally Information																																																																																			
Program Ally Company Name: _____						Program Ally Contact Name: _____																																																																													
Phone: _____						Email: _____																																																																													
Section 3: Unit Inspection - Combustion Appliance Zone (CAZ) testing is required on WHIS of units in Attached/Underground Garage																																																																																			
Number of Parking Spaces in Attached/Underground Garage: _____						Notes potential connections to building (if applicable): _____																																																																													
<table border="1"> <thead> <tr> <th>Name of CAZ Tester</th> <th>Building Unit #</th> <th>Unit Has CO Detector</th> <th>Appliance Type/Brand</th> <th>CO Reading</th> <th>BPH Action Level</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table>												Name of CAZ Tester	Building Unit #	Unit Has CO Detector	Appliance Type/Brand	CO Reading	BPH Action Level																																																																		
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Section 4: Mechanical Room Air Supply and Combustion																																																																																			
Mechanical Room 1						Air supply unrestricted and free; Air supply complies with NFPA, local code; Appliances Pass Spillage Test																																																																													
Appliance Type/Brand		Observed Operating Cycle		Efficiency Reading Pre (%) Post (%)		CO Reading Pre (ppm) Post (ppm)		BPH Action Level																																																																											
1																																																																																			
2																																																																																			
Mechanical Room 2						Air supply unrestricted and free; Air supply complies with NFPA, local code; Appliances Pass Spillage Test																																																																													
Appliance Type/Brand		Observed Operating Cycle		Efficiency Reading Pre (%) Post (%)		CO Reading Pre (ppm) Post (ppm)		BPH Action Level																																																																											
1																																																																																			
2																																																																																			
Mechanical Room 3						Air supply unrestricted and free; Air supply complies with NFPA, local code; Appliances Pass Spillage Test																																																																													
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1																																																																																			
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Mechanical Room 4						Air supply unrestricted and free; Air supply complies with NFPA, local code; Appliances Pass Spillage Test																																																																													
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1																																																																																			
2																																																																																			
Notes: _____																																																																																			
Section 5: Acknowledgement of Completion																																																																																			
I certify the information herein provided is true and correct and the tests performed satisfy the program guidelines.																																																																																			
Program Ally Signature: _____						Date: _____																																																																													

Multifamily One Stop Shop Initiative

Closing Items

Co-Branded Materials for Multifamily

At AmerenIllinoisSavings.com



- Co-branded materials are in development and will be available soon on the Program Ally Online Store for:
 - ASHP for multifamily properties
 - Building Envelope for multifamily properties
 - Funding sources for energy efficiency projects in multifamily
 - Tenant leave behind postcards for ASHP
 - Post install maintenance calendars for ASHP and DHP
- Visit the co-branding section of the Program Ally Portal to order materials



Training Archive

At AmerenIllinoisSavings.com

- Training videos and guides are available on the Program Ally Portal to expand your company's knowledge base



Morning Brief Webinar Series

At AmerenIllinoisSavings.com



- The Morning Brief Webinar Series is a 30-minute webinar that occurs on the second Tuesday of each month
- Upcoming topics include:
 - Heat Pumps
 - Customer Service Expectations
 - Program Updates
- Invites are sent via email
- Check the website frequently to ensure accurate dates
- Past episodes are archived on the website

THE MORNING BRIEF

PROGRAM ALLY WEBINARS FROM THE AMEREN ILLINOIS ENERGY EFFICIENCY PROGRAM

Program Ally Discounts

Benefits of Becoming a Program Ally

- **Trutech Tools** (TrutechTools.com)

- Coupon code “**trade8**”
- 8% discount
- A large variety of building envelope and HVAC testing equipment and free shipping on orders over \$98



- **Retrotec** (Retrotec.com)

- 10% discount
- Blower doors, duct testers and inspection cameras



Next Steps



- Reach out to your EA with any questions
- Depending on your previous involvement in the Multifamily Initiative, you may need some additional training which your EA will discuss with you directly
- Work with your EA to ensure that your Health & Safety Plan is on-file and has been acknowledged by the Program

Questions