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(**Applicant:** Please include this cover page, which IMEA will complete.)

ILLINOIS MUNICIPAL ELECTRIC AGENCY ELECTRIC VEHICLE (EV) CHARGING STATION & EV PROGRAM

START-UP KIT FOR IMEA MEMBER MUNICIPALITIES TO ESTABLISH A LOCALLY MANAGED EV CHARGING STATION PROGRAM

May 2024

**Program Year FY 2024-25
May 1, 2024 – April 15, 2025**

Program Contact:

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ABOUT THE IMEA EV CHARGING STATION & EV PROGRAM

For FY2024-25, IMEA has budgeted \$250,000 that members can use:

1. To incentivize the installation of EV charging stations in their community through a locally administered program, and/or
2. To incentivize up to 80% of the cost of purchasing or leasing for the municipality a level 2 or level 3 EV charging station; and/or
3. To incentivize up to 80% of the cost of purchasing or leasing for the municipality an Electric Vehicle (dual fuel vehicles do not qualify).

The \$250,000 is allocated to each city proportionate to its wholesale electric load share purchased from IMEA.

NOTE: Cities may choose to transfer funding from this program into the city's funding in the IMEA Electric Efficiency Program. Contact the IMEA Program Administrator (Rodd Whelpley, rwhelpley@imea.org) if you want to transfer funds.

IMEA Member Municipal Utilities use this start-up kit to establish a locally administered EV Charging Station Program using funds set aside for that purpose by IMEA (option 1 above).

This start-up kit is designed to help those IMEA Member cities that wish to participate set up their own locally managed EV Charging Station program.

Completing this start-up kit and sending it to IMEA signals the city's intent to participate in IMEA's EV Charging Station & EV Program by setting up and administering a program for their residents and commercial/industrial customers in FY2024-25.

Incentives to the city's retail customer are \$500 for a qualified EV charging station. The city pays the incentive to the retail customer and IMEA reimburses the city, up to the amount the city has set aside to use for this program (via this application/starter kit).

Qualified EV Charging Stations

IMEA Members may grant incentives for residents, C/I and public-sector customers that install a Level 2 (or higher) EV Charging Station for public or for private use.

Qualifying EV Charging Stations (Levels 2 and 3)

- *Level 2 Charging Stations:* For purposes of this initiative, a Level 2 EV Charging Station is defined as a "fast charging" station (typically powered at around 208-277V AC). It is expected that a Level 2 charging station can fully charge a typical EV in 4 to 8 hours.
- *Level 3 Charging Stations:* A Level 3 charging station is a "very fast charging" station (one that, for example, converts 480V 3-phase power to DC). A Level 3 charging station can fully charge a typical EV in 20 to 30 minutes.

EV Charging Stations that Do Not Qualify (Level 1)

- *Level 1 Charging Stations:* A Level 1 EV Charging Station is defined as a “basic” or “slow charging” station (typically powered at 110-120V AC). It is expected that a Level 1 charging station can fully charge a typical EV in 10 to 20 hours.

THE PROCESS FOR ESTABLISHING, OPERATING AND RECEIVING INCENTIVE REBATES FROM IMEA FOR YOUR LOCALLY MANAGED EV CHARGING STATION PROGRAM

1. ***IMEA reviews the Member’s start-up kit, and, when all is in order and acceptable, issues a Notice to Proceed,*** which authorizes the local program to proceed and alerts IMEA that the city or village intends to make use of some or all of its EV Charging Station & EV Program funding for FY2024-25 for this program.
2. ***The city or village creates and manages the EV Charging Station Program for its residential, C/I and public-sector customers.*** Specifically, the municipality:
 - Creates the program and establishes any local practices and program rules not contrary to those in this start-up kit.
 - Creates program application forms and any advertising and promotional materials.
 - Tracks the usage of the program.
 - Takes in applications from qualified customers and approves or rejects them.
 - As part of the approval/administration process, verifies the qualified customer has purchased a qualified EV charging station.
 - As part of the approval/administration process, verifies that the EV charging station has been installed properly and meets all relevant codes.
 - As part of the approval/administration process, verifies that if the EV charging station is made available for public use that the owner of the EV station is not operating the station in such a way that the owner is improperly acting as a retail electric provider.
 - Pays qualified customers the incentive, either in the form of a check from the city or in the form of a credit on the customer’s electric bill. The incentive level is \$500 for a qualified EV charging station.
 - When all funding has been expended or no later than May 31, 2024, sends to IMEA all required data (see items 3 and 4 below) and a request for reimbursement for the incentives paid to customers.
3. ***The city or village keeps data, in the form of a spread sheet, that includes for each EV charging station incentivized under the program:***
 - The name of the qualified customer.
 - The qualified location of the EV charging station.
 - The level of the charging station.
 - The manufacturer of the charging station.
 - The model of the charging station.
 - The serial number of the charging station.
 - Whether this is a one- or two-prong station.
 - The installation date of the charging station.
 - The installer of the charging station.

- The date the charging station passed city inspection.
- The purchase price of the charging station.
- The cost of installation for the charging station.
- The amount of the incentive paid to the customer.
- The method of the incentive paid to the customer (e.g., check or bill credit).
- The date the incentive was paid to the customer.

The city or village keeps this information ready to include with the request for reimbursement from IMEA, which can be made when all funding has been expended or at other intervals by arrangement with IMEA.

The city or village also agrees to make available to the IMEA, upon request, charger usage data (e.g., hourly interval metering).

4. ***The city or village applies for a final incentive reimbursement from IMEA:*** When all funding has been expended or at other intervals by arrangement with the IMEA, the city sends to IMEA a memo requesting reimbursement for the funds allocated and/or expended for the city EV Charging Station Program along with the spread sheet described in item 3 above.
5. ***IMEA reviews the final incentive request, resolves any issues and pays the city.***

**ILLINOIS MUNICIPAL ELECTRIC AGENCY EV CHARGING STATION & EV PROGRAM
START-UP AND FINAL REIMBURSEMENT CHECKLISTS
FOR YOUR LOCALLY MANAGED EV CHARGING STATION PROGRAM**

Pre-Approval Start-Up Kit Checklist

Pre-Approval Start-Up Kit must include:

- This Completed Pre-Approval Locally Managed EV Charging Station Program Start-Up Kit – the cover page and pages 5-8 of this application. (Found at <https://www.imea.org/Electric%20Vehicle%20Incentives%20Program%20Details.asp>.)
- Ancillary materials listed on page 8 item 2 of this application.

To Submit a Pre-Approval Start-Up Kit

1. Gather materials listed above.
2. E-mail them to Rodd Whelpley at rwhelpley@imea.org.

If you have questions, e-mail Rodd Whelpley or call 217-789-4632.

Final Incentive Reimbursement Request Checklist

Incentive Reimbursement Request must include:

- A memo that includes: a) request for reimbursement to the city or village from IMEA and the total amount requested; b) the number of incentivized EV charging stations for which the city or village is requesting reimbursement
- A spread sheet that includes (at least) the following data fields for each EV charging station:
 - The name of the qualified customer.
 - The qualified location of the EV charging station.
 - The level of the charging station.
 - The manufacturer of the charging station.
 - The model of the charging station.
 - The serial number of the charging station.
 - Whether this is a one- or two-prong station.
 - The installation date of the charging station.
 - The date the charging station passed city inspection.
 - The amount of the incentive paid to the customer.
 - The method of the incentive paid to the customer (e.g., check or bill credit).
 - The date the incentive was paid to the customer.

To Submit a Final Incentive Reimbursement Request

1. Gather materials listed above.
2. E-mail them to Rodd Whelpley at rwhelpley@imea.org.

If you have questions, e-mail Rodd Whelpley or call 217-789-4632.

IMEA MEMBER AND MUNICIPALLY MANAGED EV PROGRAM INFORMATION

Name of IMEA Member Municipality	
Project Manager (This is the person IMEA can contact with questions about your municipality's EV Charging Station Program):	
Telephone #:	Email Address:
PROGRAM FUNDING REQUESTED	
IMEA Program Funding for FY 2024-25	
You'd like to set aside to use for this program = \$ _____	
(NOTE: Contact the program administrator if you have questions concerning your available funding)	
<u>To Receive Your Funding</u>	
See and follow the instructions on pages 2 – 4, and especially see the final application checklist on page 5.	

APPLICANT CERTIFICATIONS

NOTE: If this project is approved and completed, then IMEA will send an Automated Clearing House (ACH) Payment Authorization Form to the applicant listed on this page. The incentive will be deposited into the account specified on the ACH form.

Applicant hereby certifies and understands that:

- The project site receives wholesale electric service from IMEA or electric delivery service from an IMEA member municipal electric system.
- It has not been barred from contracting with a unit of state or local government as a result of a violation of Section 33E-3 or 33E-4 of the Criminal Code of 1961 (720 ILCS 5/33 E-3 and 5/33 E-4).
- The Illinois Prevailing Wage Act (820 ILCS 130/0.01) may apply and that Grantees are responsible for determining if their projects will trigger compliance.
- As of the submittal date, the information provided in its application is accurate, and the individuals signing below are authorized to submit this application.

Authorized City/Village Official (signature*)

Telephone

Typed/Printed Name

Fax

Title

Date

Authorized Signature Address

Authorized Signature City, 9 Digit Zip (find 9-Digit Zip at <http://zip4.usps.com/zip4/welcome.jsp>)

Authorized Signature E-mail Address

*Electronic signatures not acceptable. Please supply Certifications (this page) with original signature via mail, fax or electronically (scanned document)

NARRATIVE DESCRIPTION OF THE CITY OR VILLAGE’S MUNICIPALLY MANAGED EV CHARGING STATION PROGRAM AND ADDITIONAL REQUIRED MATERIALS

- 1. In the space below (or as a separate attachment) please provide a short narrative of how your Electric Vehicle Charging Station Program will work.**

- 2. Include with your pre-Approval Start-Up Kit:**

- a) The application your retail customers will use to receive an incentive from the city or village. **This is REQUIRED.** (See Appendix 1, page 9 for an example.)
- b) A copy of the content of – or a link to – your municipally managed EV Charging Station Program’s web page. *This is useful, but optional.*
- c) Any other ancillary materials that advertise or explain your EV Charging Station Program. *This is useful, but optional.*

APPENDIX 1 – MODEL APPLICATION FORM

(You may want to model your city or village’s application form after this example (or at least start from this example).
NOTE: This is raw material. You will want to design this form much better than it is presented here.)

<Your City Here> ELECTRIC VEHICLE (EV) CHARGING STATION REBATE APPLICATION FORM

Instructions:

Fill this form out completely and sign. Attach required documentation: a) itemized equipment receipt(s) or invoices, b) installation invoices, c) a W-9 or a tax-exempt letter, if applicable.

For Questions About this Program or the Application Process, Please Contact:

<Name and Contact Information for
Your Municipality’s Program Manager Here>

Eligibility (Note: See page X if this application for more complete requirements):

To be eligible for this rebate you must:

- Be a <your utility name here> customer in good standing and not otherwise negligent on obligations to the municipality.
- Purchase and install your Level 2 or Level 3 EV Charging Station between <date here> and April 30, 2025.
- Pass a city or village inspection of your eligible EV Charging Station before April 30, 2025.
- Have your EV charger connected to an <your utility name here> electric meter and billed under the appropriate residential or commercial/industrial electric rate.
- Consent to onsite audits and review of usage data as requested.

Rebate per qualified EV charging station is \$500.00

NOTE: Rebates will be in the form of <either “a check” or “a credit on the electric bill”>.

REQUIRED CUSTOMER INFORMATION

Person or Company Receiving the Rebate: _____

Primary Contact: _____
Phone: _____
E-mail: _____

Installation Address: _____

Account Number of Installation Address: _____

This is a (check one): Residence Business Public sector facility Other

Tax Status (provide appropriate information):

<Note: This section of the sample application may be excluded at the option of the IMEA member municipality>

W-9 Attached

Employer Identification Number: _____

Resident Social Security Number: _____

Non-profit tax-exempt letter attached.

REQUIRED CHARGING STATION INFORMATION

Charging station is (check one)

Level 2: a “fast charging” station (typically powered at 208-277V AC).

Level 3: a “very fast charging” (e.g., a station that converts 480V 3-phase power to DC).

Single Prong (charges one vehicle at a time)

Dual Prong (can charge two vehicles at once)

EV Charger Manufacturer: _____

EV Charger Model: _____

EV Charger Serial Number: _____

Where Purchased: _____

Purchase Date: _____

Purchase Cost (receipts attached): _____

Installation Date: _____

Installer/Company: _____

Installation Costs (receipts attached): _____

REBATE TERMS AND CONDITIONS

Subject to funding available from the municipal electric department's wholesale electric provider, the Illinois Municipal Electric Agency, <Name of Utility> will offer qualified customers a rebate of \$500 for installing a Level 2 or Level 3 EV charging station.

The applicant must:

- Be a <your utility name here> customer in good standing and not otherwise negligent on obligations to the municipality.
- Purchase or long-term lease and install the Level 2 or Level 3 EV charging station between <date here> and April 30, 2025.
- Pass a <city/village> inspection of the eligible EV charging station installation before April 30, 2025.
- Have the EV charger connected to a <your utility name here> electric meter and billed under the appropriate electric rate.
- Consent to onsite inspections, audits and reviews of usage data as requested.

For purposes of this program (definitions):

- A *Level 2 EV Charger* is defined as a “fast charging” station (Typically powered at 208-240V AC).
- A *Level 3 EV Charger* is defined as a “very fast charging” station (for example one that converts 480V 3-phase power to DC).

Electric Vehicle Charger Restrictions

- EV chargers that do not fit the definition of Level 2 or Level 3 do not qualify.
- EV chargers that purchased or long-term leased and installed between prior to April 30, 2024 do not qualify.
- EV chargers that do not pass <city/village> inspection do not qualify.
- EV chargers owned by persons or business that are customers that are not in good standing with <your utility name here> or who are otherwise negligent on obligations to the municipality do not qualify.
- EV chargers that are used, refurbished or leased for a contract period of less than 5 years do not qualify.
- EV chargers that are gifted or won as part of a raffle or giveaway do not qualify.
- EV chargers that are bundled with the purchase or lease of a vehicle or are otherwise included in the price of a vehicle do not qualify.
- Projects must demonstrate permanency. EV chargers must be purchased or leased on a contract term of no less than 5 years to qualify.
- All <city/village>, county, state government, property owner, or homeowners association rules, codes and regulations must be complied with during the installation and use of the EV charging station.
- <Utility Name Here> requires a qualified electrician install a Level 2 charger or Level 3 charger.

Failure to comply with any of the foregoing requirements could result in the denial of any rebate awards.

Inspections and Information Sharing

<Utility Name Here> reserves the right to audit your installation. By signing this rebate application form, you agree, with reasonable notice, to provide a <Utility Name Here> and/or an Illinois Municipal Electric Agency (IMEA) representative with access to the installation during normal business hours or as otherwise agreed between you and the <Utility Name Here> and/or the IMEA. If the field audit discovers the charging station has not been installed as indicated on this rebate application, then the customer’s award may be rescinded.

The applicant acknowledges and agrees that <Utility Name Here> will make available to the Illinois Municipal Electric Agency purchase and installation data related to the EV charging station and, upon the IMEA’s request, charger usage data (e.g., hourly interval metering).

<City or Village Name Here> and the Illinois Municipal Electric Agency are Not Responsible for Failure of Installed Equipment.

<City or Village Name here> and <Utility Name Here> and its wholesale electric provider, the Illinois Municipal Electric Agency (IMEA) are not a party to any sales transaction between you and the EV charging station manufacturer/dealer or installer. <City or Village Name here> and <Utility Name Here> and IMEA’s liability and responsibility in the <Utility Name Here> Electric Vehicle Charging Station Program shall be strictly limited to the making of certain rebate payments for eligible equipment. Neither <City or Village Name here> nor <Utility Name Here> nor IMEA makes or provides – and specifically disclaims – any and all representations, warranties, covenants or guarantees whatsoever, express or implied, in connection with the electric vehicle charging station or the program itself, including, without limitation, the implied warranties of merchantability and fitness for a particular purpose. Neither <City or Village Name here> nor <Utility Name Here> nor IMEA shall in any way be liable or responsible for any equipment installed by – or for any act of omission of – any other entity or individual, including, without limitation, the equipment manufacturer or any electrician, technician, or other service provider.

CUSTOMER SIGNATURE AND CERTIFICATION

I certify that I have purchased or leased for a period of not less than 5 years the equipment described in this form and that it has been installed at the service address indicated. I agree to the terms and conditions.

Customer Signature

Date

SUBMITTING YOUR FORM:

Submit

- This rebate form
- Itemized equipment receipts or invoices
- Installation invoices
- A W-9 (if applicable)
- Non-profit tax-exempt letter (if applicable).

To:

<Name and Contact Information for
Your Municipality's Program Manager Here>

FOR <CITY or VILLAGE> USE ONLY:

Date Application Received: _____

Date Application Reviewed and Deemed Complete: _____

Date Applicant Contacted to Arrange Inspection: _____

Date of Inspection: _____

Disposition of Inspection (pass or fail): _____

Amount of Eligible Rebate: _____

Date Rebate Sent to Customer: _____

Form of Rebate (check or bill credit): _____

Date Project Information Entered into Program Spreadsheet
(required by IMEA to be turned in at the end of the program): _____