



Received: \_\_\_\_\_ Project # \_\_\_\_\_ \_\_\_ Pre-App \_\_\_ Final App

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

## ILLINOIS MUNICIPAL ELECTRIC AGENCY ELECTRIC EFFICIENCY PROGRAM

### INCENTIVES FOR IMEA MEMBER COMMERCIAL / INDUSTRIAL and PUBLIC SECTOR ENTITIES

#### **Custom Projects**

May 2024

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

#### **NOTE TO APPLICANTS ABOUT PROGRAM FUNDING AND PROJECT START DATES:**

**Cities have limited funding.** You may want to contact the program administrator to check on funding availability before making a pre-application.

Projects that hope to receive an incentive should not begin until they have:

- a) submitted a pre-application;
- b) received a Notice to Proceed from the city and/or IMEA, and;
- c) had a pre-inspection (if required by the city).

#### **Program Contact:**

**Rodd Whelpley**, Program & Communications Administrator  
Illinois Municipal Electric Agency  
3400 Conifer Drive  
Springfield, IL 62711  
Ph: 217-789-4632 or 800-243-4632  
FAX: 217-789-4642  
[rwhelpley@imea.org](mailto:rwhelpley@imea.org)

## A SUMMARY OF HOW THIS PROGRAM WORKS

**NOTE:** Applicants who want to receive an incentive for an electric efficiency project should not begin the project until they have received a Notice to Proceed (see items 5 and 6 below). **Pre-approval is required for all projects.**

1. The applicant fills out this application (Pre-Application) and gathers the additional required materials that constitute a complete application (see the checklist on page 3). **Before filing an application, IMEA suggests contacting the program administrator, Rodd Whelpley (217-789-4632 or [rwhelpley@imea.org](mailto:rwhelpley@imea.org)), to check on a city's funding availability.** Funds are limited and go fast in several IMEA cities.
2. The applicant sends all materials constituting a pre-application to Rodd Whelpley at the Illinois Municipal Electric Agency ([rwhelpley@imea.org](mailto:rwhelpley@imea.org)), **as a single PDF file. Only one application per e-mail.**
3. Rodd Whelpley will review the pre-application and make any necessary adjustments or corrections. Once it is in order, he will pass the pre-application to the IMEA Board Member or other designated official representing the applicant's municipality.
4. City officials will review the pre-application (and may make any necessary adjustments or corrections). City officials will determine the incentive amount they will offer. **This amount may be between \$0 up to the amount for which the project qualifies.** They will communicate their decision to Rodd Whelpley at IMEA. *City officials may set additional caps, limits and rules that are in addition to those listed in this general IMEA application.*
5. Rodd Whelpley will send the applicant a Notice to Proceed. The Notice to Proceed sets aside funding solely for this project. Also with the Notice to Proceed, Rodd will communicate any instructions from the city concerning pre-inspections. (In most cases, IMEA does not require a pre-inspection, but some member cities require them.)
6. **NOTE:** Applicants who want to receive an incentive for an electric efficiency project should not begin the project until they have received a Notice to Proceed and have had a pre-inspection (if required). **Pre-approval is required for all projects.**
7. The applicant does the project (and, if necessary, has a post-inspection).
8. The applicant gathers the necessary materials that constitute a complete final application (see the checklist on page 4) and sends that to Rodd Whelpley ([rwhelpley@imea.org](mailto:rwhelpley@imea.org)) **as a single PDF file.** GENERALLY, for projects that don't change from how they were described in the pre-application, we make a short cut, and the final application is comprised only of sending copies of all final and paid, itemized bills associated with the project preferably as a single PDF file.
9. Rodd Whelpley reviews the final application and makes any necessary adjustments or corrections.
10. IMEA deposits the incentive funds into an account designated on the applicant/payee's Automated Clearing House Payment Authorization form.

# IMEA ELECTRIC EFFICIENCY PROGRAM PRE-APPLICATION CHECKLIST AND SUBMISSION REQUIREMENTS

A **Complete Pre-Approval Application** must include:

- Completed Pre-Approval Application (found at <http://www.imea.org/EE%20Incentives.asp>).
- Signed Certification (**page 6** of this application).
- A signed letter of assignment, if the incentive will go to any entity other than the local applicant or the national headquarters of the local applicant.
- A narrative description of the project, describing existing equipment, new equipment, annual run times, etc.
- A project budget (not just a single Total Project Cost figure reported on page 5). (Vendor bids may constitute a budget.)
- Manufacturer spec sheets for new equipment.
- A calculation of electric savings signed off on by a professional engineer. The calculation must provide enough detail that IMEA and/or city engineers can review the calculations and all the assumptions behind them.
- Copy of applicant's electric bill.

## **To Submit a Pre-Application**

- 1. Gather materials listed above.**
- 2. Put them into a single PDF file.**
- 3. E-mail application in a single PDF file to Rodd Whelpley at [rwhelpley@imea.org](mailto:rwhelpley@imea.org). **Only one application per e-mail.****

**NOTE: Applications comprised of multiple files delay processing and will very likely be returned to the applicant un-opened.**

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

# IMEA ELECTRIC EFFICIENCY PROGRAM FINAL APPLICATION CHECKLIST AND SUBMISSION REQUIREMENTS

A **Complete Final Application** must include:

- Completed Final Application (found at <http://www.imea.org/EE%20Incentives.asp>).
- Signed Certification (**page 6** of this application).
- A signed letter of assignment, if the incentive will go to any entity other than the local applicant or the national headquarters of the local applicant. *If the incentive is assigned, then the final customer billing must provide documentation (usually in the form of a bill credit) showing that the city's retail electric customer received the benefit of the incentive.*
- A narrative description of the project, describing existing equipment, new equipment, annual run times, etc.
- Copies of all PAID and itemized invoices and receipts related to the project.
- Manufacturer spec sheets for new equipment.
- A calculation of electric savings signed off on by a professional engineer. The calculation must provide enough detail that IMEA and/or city engineers can review the calculations and all the assumptions behind them.
- Copy of applicant's electric bill.
- "Before" and "after" images, if requested by Program Administrator (see requirements listed in your Notice to Proceed).

## **To Submit a Final Application**

1. Gather materials listed above.
2. Put them into a single PDF file.
3. E-mail application in a single PDF file to Rodd Whelpley at [rwhelpley@imea.org](mailto:rwhelpley@imea.org). Only one application per e-mail.

**NOTE: Applications comprised of multiple files delay processing and will very likely be returned to the applicant un-opened. Also, see your Notice to Proceed e-mail for instructions for a possible streamlined final application process.**

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

**APPLICANT AND PROJECT INFORMATION**

Check one:          **Pre-approval**                          **Final Application**

<b>Name of Applicant – Company Name</b>		
<b>Proposed Start Date:</b>		<b>Planned Completion Date:</b>
<b>Address where measures installed:</b>		
<b>Address:</b>	<b>City:</b>	<b>Zip:</b>
<b>Facility/Business Type:</b> _____ <b>Confirm this is a retrofit project:</b> _ yes _ no (if no, then project may not qualify) <b>Heating Fuel Type (check one):</b> _ Gas    _ Electric Resistance    _ Heat pump    _ Unconditioned/Exterior <b>Hours of Operation (list Opening and Closing Times):</b> Monday: _____                      Friday: _____ Tuesday: _____                      Saturday: _____ Wednesday: _____                      Sunday: _____ Thursday: _____ <b>Weeks per year of Operation:</b> ____ Weeks		
<b>Project Manager:</b>		
<b>Telephone #:</b>	<b>Fax #:</b>	<b>Email Address:</b>
<b>IMEA Electric Efficiency Incentive Requested</b>	<b>Contractor Information (if known)</b>	
\$ _____		
<b>Other Incentive Funds</b>		
\$ _____		
<b>Specify Source of Other Incentive Funds</b>	<b>Company:</b>	
<b>Total Project Cost</b>		
\$ _____	<b>Phone:</b>	

## 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.

IF THE REBATE INCENTIVE SHOULD GO TO ANY ENTITY OTHER THAN THE LOCAL APPLICANT OR ITS NATIONAL HEADQUARTERS, then you must include a signed letter of assignment. In that case, upon completion of the project, the designated payee will file the ACH form and receive the incentive. *If the incentive is assigned, then the final customer billing must provide documentation (usually in the form of a bill credit) showing that the city's retail electric customer received the benefit of the incentive.*

### **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.
- All authorizations required to perform the project described in this application have either been obtained or will be obtained no later than 90 days following the project beginning date set forth in the Notice to Proceed Letter issued by the IMEA.
- 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 incentive recipients 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.
- Replaced equipment will be disposed of – not placed in storage.
- The applicant, by accepting an incentive for this electric efficiency project, acknowledges and agrees that any rights or abilities arising from kW savings that result from the execution of this project and that may be bid or sold into a Regional Transmission Operator market as energy efficiency or demand response or otherwise shall belong solely to IMEA.

\_\_\_\_\_  
Authorized 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)

## CALCULATION OF ELIGIBLE INCENTIVE

(To be reported on page 5)

### A Two-Step Summary of How to Calculate Your Eligible Incentive

1. As part of this application, a professional engineer will calculate the annual kWh savings attributable to this project. The data and methodology will be shared as a part of this application. IMEA and/or municipal engineers will review the calculation and make any adjustments as necessary to arrive at an agreed upon annual kWh savings attributable to the project. *NOTE:* For purposes of the IMEA Electric Efficiency Program, eligible incentive calculations, the acceptable annual kWh savings attributable to the project may not include electricity savings resulting from changes in the hours of use of the new equipment, measures based on changes in operator behavior, or ancillary electric savings (e.g., reduced electricity usage for heating or cooling for non-HVAC projects).
2. The project will be eligible for an incentive of \$0.08 x the agreed upon annual kWh savings.

### NOTES:

Projects that hope to receive a rebate incentive should not begin until after they receive a Notice to Proceed and have had a pre-inspection.

IMEA requires pre- and post-inspections for all custom projects.

IMEA member municipalities reserve the right to refrain from considering offering incentives for any or all custom projects.

IMEA member municipalities may offer an incentive of anywhere from \$0 up to the amount for which the project is eligible.

The incentive may not exceed 75% of total project cost. NOTE: IMEA member municipalities may place their own caps and limits on incentive amounts.

**A Complete Pre-Approval Application** must include:

- Completed Pre-Approval Application (found at <http://www.imea.org/EE%20Incentives.asp>).
- Signed Certification (**page 6** of this application). A signed letter of assignment, if the incentive will go to any entity other than the local applicant or the national headquarters of the local applicant.
- A narrative description of the project, describing existing equipment, new equipment, annual run times, etc.
- A project budget (not just a single Total Project Cost figure reported on page 5). (Vendor bids may constitute a budget.)
- Manufacturer spec sheets for new equipment.
- A calculation of electric savings signed off on by a professional engineer. The calculation must provide enough detail that IMEA and/or city engineers can review the calculations and all the assumptions behind them.
- Copy of applicant's electric bill.

## GENERAL ELIGIBILITY

This Electric Efficiency program is available to the membership (and members' retail customers) of the Illinois Municipal Electric Agency (IMEA). It is administered and funded through IMEA. FY2024-25 of the program runs from May 1, 2024 through April 30, 2025. Funds are allocated to IMEA members based on a prorated share of their electric purchases from the IMEA. Commercial/ industrial and public-sector facilities served by members can apply for funds using this form from May 1, 2024 until this form is superseded by a subsequent revision or until the program ceases accepting pre-applications on April 15, 2025.

Eligible projects must be located in Illinois and receive electric service from the IMEA or an IMEA member. Projects must produce electricity savings through efficiency improvements in commercial, industrial or public-sector buildings, equipment, or processes. Ineligible projects include repairs of existing equipment, fuel switching, new electric generation or those projects solely related to demand response or demand control. Project paybacks must occur before the projected end of the equipment life.

**Incentive Awards.** The total incentive cannot exceed 75 percent of the total project cost. IMEA reserves the right to review applications, withhold funding, cancel funding or negotiate incentive levels. Bid prices must be in line with current market conditions for similar projects/conditions.

**Payment Schedule/Reporting and Project Monitoring.** The Notice to Proceed (sent upon approval of the pre-application) will specify the conditions of payment and the payment schedule. Incentive recipients will allow officials from the IMEA member municipality and IMEA officials access to their site to verify project issues. Energy savings numbers will be shared with IMEA (for public release unless specifically noted as confidential or proprietary).

**Ownership/Use of Equipment.** Equipment must remain in place for at least the lesser of five years or "useful life."

**IMEA Not Liable.** Incentive recipients shall hold the IMEA member and the IMEA harmless from any and all claims, demands, and actions based upon or arising out of any services performed by the incentive recipient or by its agents or employees.

**Indemnity.** The incentive recipient agrees to assume all risks of loss and to indemnify and hold the IMEA member and the IMEA, their officers, agents and employees, harmless from and against any and all liabilities, demands, claims, damages, suits, costs, fees, and expenses, incidents thereto, for injuries or death to persons and for loss of, damage to, or destruction of property because of the incentive recipient's negligence, intentional acts or omissions. In the event of any demand or claim, the IMEA may elect to defend any such demand or claim against the IMEA and will be entitled to be paid by the incentive recipient for all costs and damages.

**Term and Application.** Applications under this program will be accepted on an ongoing basis, subject to funding availability. Applications shall be printed or typed on the current approved forms and/or worksheets. Applications must be complete and submitted in the correct fashion (see the Pre-Application and Final Application checklists) to receive consideration.



Subject to a programmatic change enacted by the IMEA Board of Directors, approved projects will have reserved funds until April 30, 2025 or until a project expiration date as noted on a project's Notice to Proceed document or a project deadline imposed by the IMEA member. A final application, reflecting the measures and equipment actually installed, must be submitted within 45 days of project completion. Project documentation, such as copies of dated and itemized invoices for the purchase and installation of the measures and/or product specification sheets, is required.

Applications will be screened by IMEA and the member community. The IMEA member will have final say as to the priority of project funding in its community. Decisions on project priority and funding awarded to any project will be communicated to the IMEA through the IMEA Board Member representing the member community.

**Incentive Payments.** A final application, reflecting the measures and equipment actually installed, must be submitted within 45 days of project completion. Project documentation, such as copies of dated, itemized invoices for the purchase and installation of the measures and/or product specification sheets, is required. The IMEA will review the final application. Applications that satisfy the review will be processed upon IMEA approval. The incentive will be the amount for which the project qualifies up to the amount that was obligated for the project in the project's Notice to Proceed, subject to funding availability.

## **MEASURE SPECIFIC REQUIREMENTS – CUSTOM PROJECTS**

1. This application covers only those projects for which there is not an appropriate IMEA Electric Efficiency Program prescriptive application.
2. Projects that involve repairs to existing equipment, generation, fuel switching or changes in behavior to achieve electric savings are not eligible.
3. The custom projects measure is intended as a retrofit or replacement program for projects that make already existing equipment or processes more efficient. Equipment installed as part of new construction or as part of a renovation or a facility change-of-use project *may* be eligible at the discretion of the IMEA and the IMEA member municipality.
4. Only proven equipment will be eligible for an incentive. Evidence of “proven” equipment may be (but is not limited to) the equipment's inclusion in other Illinois electric efficiency programs or the equipment's accreditation or seal of approval by a recognized entity that sets industry standards. In all cases, IMEA and IMEA member municipalities reserve the right to determine whether the proposed equipment is acceptably “proven.”