# Metering & Monitoring Application

**Metering & Monitoring Program goals:**

Ameren Illinois is offering financial support for enhancements to metering and monitoring of energy. The program will pay up to an initial $15,000 (up to 25% of the costs) to install new meters or software to better visualize, manage, and reduce energy use. When enough energy is saved through efficiency actions that result from the use of this enhanced monitoring, an additional potential $20,000 will be paid (up to 75% of the project costs). The incentive may potentially cover 100% of the cost of enhanced metering and monitoring. **Preapproval is required to receive this offer.**

**Does your facility/project qualify?**

- ☐ Metering and monitoring software/equipment must be installed to provide data for energy savings and other factors required for a customer decision to move forward with an energy saving project.
- ☐ Metering and monitoring software/equipment must be intended to identify and implement energy efficient measures through a structured plan. Subsequent Custom, Standard and Retro-commissioning projects (excluding lighting retrofits) resulting from metering and monitoring data should be extensive energy efficiency projects, equipment optimization or process improvements, and must also meet Ameren Illinois Energy Efficiency Program cost-effectiveness and technical criteria.
- ☐ Metering and monitoring software/equipment must be installed at a business or commercial/industrial building.
- ☐ Non-residential facility.
- ☐ Electric projects: electric delivery service rate DS2, DS3, DS4, DS5, or DS6 and Energy Efficiency Demand Response surcharge on Ameren Illinois bill for the service point corresponding to the electric project. If your account is opted out of the EnergyEfficiency Programs for 2028, you will be ineligible to participate in Ameren Illinois' EE electric program. DS1 projects will be considered if there is no other Offering in the Residential or Business Program able to serve the DS1 customer.
- ☐ Gas projects: gas delivery service rate GDS2, GDS3, GDS4, GDS5, or GDS7 and Energy Efficiency Programs Charge on Ameren Illinois gas bill for the service point corresponding to the gas project. GDS1 projects will be considered if there is no other Offering in the Residential or Business Program to serve the GDS1 customer.
- ☐ Metering & Monitoring equipment to be installed on or after January 1, 2027 and by December 31, 2027
- ☐ 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 www.icc.illinois.gov/emdb/ucdb/search by choosing Authority Type, 'EnergyEfficiency Installers.'

☐ **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 no auto-fill calculations.**

**Incentives:**

- ☐ Base incentive: lesser of 25% of the metering and monitoring installed costs, or $15,000. Paid once new metering and monitoring software/equipment is installed.
- ☐ Performance incentive: $0.04/kwh or $0.15/therm saved based on annual energy savings generated by projects identified and implemented via metering and monitoring. Capped at lesser of 75% of metering and monitoring installed costs or $20,000.
- ☐ Total maximum for Base and Performance incentives is $35,000.

# Metering & Monitoring Application

**What you should know before beginning:**

☐ Preapproval is required for ALL Metering & Monitoring applications.

☐ Subsequent projects resulting from metering and monitoring must be submitted within two years of the Base incentive check is approved.

☐ Submitted projects must be completed within the current or following two program years (unless an exception is granted by Energy Efficiency staff).

☐ Only external labor costs can be incentivized; internal labor is not eligible for incentive money.

☐ Metering and monitoring Performance incentives cannot be combined with the Staffing Grant, Feasibility Study, or Retro-commissioning incentives.

☐ Participation may be limited to the first 40 applications received during the effective dates listed.

☐ Single customers/companies are limited to three applications during the effective dates listed. Caps may be lifted by Program Management for each Metering & Monitoring installation that generates savings.

☐ Individual Program Allies are limited to three applications during the effective dates listed. Caps may be ☐ lifted by Program Management for each Metering & Monitoring installation that generates savings.

☐ Application paperwork can be submitted via email or hard copy. Do not submit "zip" files. You will ☐ receive a confirmation email within two business days of submitting a complete and correct application.

**Participation instructions:**

- Step One: Submit your application for pre-approval as directed within this application form. Do not purchase any material or generate purchase orders until a pre-approval letter is issued.
- Step Two: Upon receipt of the pre-approval letter, purchase and install the approved equipment. **NOTE**: if you are considering changes to the scope of work, it is imperative to contact a program representative to discuss how the change will impact your savings/incentive and the necessary steps required to request incentive changes.
- Step Three: The Base metering and monitoring application incentive is paid upon installation of the metering and monitoring software/equipment. Complete rows A, B, and C of the Incentive Calculation, Table 2, for an estimated incentive amount. Submit completed Metering & Monitoring Application Incentive Payment Request within 30 days of metering equipment installation **or by December 31, 2027 whichever comes first**.
- Step Four: As soon as subsequent projects are completed return a copy of the Metering & Monitoring application Incentive Payment Request Form, and the required documents indicated on that form. Complete rows E, F, and G of the Incentive Calculation, Table 2, to tally the Performance incentive amount.

*Detailed, step-by-step instructions, FAQs, and other helpful information are available in the Application Guide (www.amerenillinoissavings.com/business-forms-library/).

# Metering & Monitoring Application

## Customer and Project Information

*Red indicates a required field.*

### Table 1 - Ameren Illinois Customer Information

| Customer Name on Ameren Illinois Account | Customer tax status | Ameren Illinois Electric Account Number:* / Ameren Illinois Natural Gas Account Number:* |
|---|---|---|
| Signed W-9 form is required documentation<br>Click here for a blank W-9 form | ☐ Taxable/non tax exempt<br>☐ overnment<br>☐ 501(c)( )<br>☐ ther tax exempt | *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 Email | Phone (XXX) XXX-XXXX | Ext. | Fax (XXX) XXX-XXXX |
|---|---|---|---|
| | | | |

| Secondary Participant Contact Name (if applicable) | Phone (XXX) XXX-XXXX | Email |
|---|---|---|
| | | |

**Physical Installation Address (if different than above)**

| Installation Address | City | State | Zip |
|---|---|---|---|
| | | IL | |

Check one: ☐ Owner ☐ Tenant

**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 |
|---|---|
| | |

### Company Used for Metering & Monitoring Software

| Company Name | Contact Name | Contact Title |
|---|---|---|
| | | |

| Mailing Address | City | State | Zip Code |
|---|---|---|---|
| | | | |

| E-mail Address | Phone (XXX) XXX-XXXX | Fax (XXX) XXX-XXXX |
|---|---|---|
| | | |

### Facility/Project Description

Facility Type (check one):

☐ Office
☐ Medical
☐ Restaurant
☐ Grocery
☐ School/College
☐ Other (please specify below):
☐ Warehouse/Distribution
☐ Retail/Service
☐ Manufacturing/Industrial
☐ Hotel/Motel
☐ Multiple

If Manufacturing/Industrial, specify type:

☐ Food Processing
☐ Automotive/Transportation/Infrastructure
☐ Other (please specify):

Facility Size (total interior square feet served by the account number provided above):

**Newer versions of the application forms posted to the Ameren Illinois Energy Efficiency website supersede all previous versions. The revision number is listed in the footer of each page. The version of the application that was available at the time you submitted your pre-approval application will apply.**

# Metering & Monitoring Application

## 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 $250,000 per project.
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 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.

# Metering & Monitoring Application

**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 PARTICATION 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.

**13. IF TENANT:** If the facility is under lease, the Customer's tenant who controls the Facility, by executing this agreement, assumes the rights and obligations of the Customer hereunder. **(Rev18)**

# Metering & Monitoring Application

**Due to the nature of this offering and the incentive dollars committed, Ameren Illinois has established the following requirements**

ALL METERING & MONITORING APPLICATIONS

- Return the signed pre-approval letter within 14 days of receipt.
- Periodic contact (no less than quarterly) with a member of the Energy Efficiency team to discuss the project plan, scope, and timeline – until all subsequent projects are completed and the "performance" Incentive Payment Request is submitted. This contact will be initiated by Ameren Illinois Energy Efficiency Staff.

## Customer Commitment Form

**You must complete the following form and submit it with your Metering & Monitoring Application to be eligible for incentive payment. Completing this form indicates that the Ameren Illinois customer is committed to completing all satisfactory projects that are identified by the Metering & Monitoring software/equipment plan. Incompletion of projects identified by the Metering & Monitoring software/equipment forfeits any "performance" Metering & Monitoring application incentive payment.**

**Please attach the structured metering plan which is the cornerstone of the incentive. This should be completed by the customer together with input from their Metering & Monitoring supplier and an Energy Efficiency Advisor. Facility metering can have a variety of applications for the energy manager. The necessity to control costs, diagnose equipment malfunction, allocate usage, and set resource efficiency goals are all increasingly important reasons for energy metering. The plan should describe the need for the Metering & Monitoring, the project(s) to be investigated, data to be collected (meter type, location and sampling rate), and any potential proposed solutions or project outcomes. The plan should:**

- Formalize objectives and goals of metering: Identify and confirm goals of stakeholders/users; Prioritize goals as near-term, mid-term, and long-term; Formalize necessary/expected outcomes
- Develop plan structure: Identify data and analysis needs based on necessary outcomes; Develop equipment needs based on data needs; Take advantage of existing infrastructure; Identify responsible staff
- Develop criteria for evaluation metering costs, benefits, and impacts to existing systems, infrastructure, and staff: Determine relative economics of proposal; Justify with cost/benefit, return on investment, or payback metric
- Develop a prioritized implementation plan targeting manageable successes: Screen opportunities based on success potential; Start small/manageable—build off success
- Develop a sustainable plan targeting use, updates, calibration, maintenance, and program reinvestment: Maintain your investment; Make this success visible; Plan for future implementation/reinvestment
- Metering for energy efficiency refers to the measurement of quantities of a product delivered (e.g., kilowatt-hours of electricity, cubic feet of natural gas, pounds of steam, or gallons of water). Metering may also involve identifying times-of-use for the various energy sources, the instantaneous demand for energy, as well as identify energy use for a collection of buildings, individual buildings, rooms, or specific equipment (e.g., a boiler, chiller, or motor).
- Eligible software/equipment includes:
  - any installed meter or data logger that will allow the customer to more carefully track energy consumption (not restricted to electric and gas meters; could include measurement of steam generation or process flow, for example)
  - communication media for the sole purpose of metering
  - software for real time and historical analysis of energy related data
  - existing metering system expansion that incorporates new meter points or adds desirable functionality

What simple payback period would be necessary for you to complete the project(s) identified by Metering & Monitoring?

- ☐ **0-12 month payback** (May be eligible for the "performance" Metering & Monitoring application incentives but not project incentives)
- ☐ **1-3 year payback**
- ☐ **3-5 year payback**
- ☐ **5-10 year payback**
- ☐ **10-15 year payback**

What other requirements or criteria does the Metering & Monitoring plan need to address in order to move forward with potential project(s) that are identified?

# Metering & Monitoring Application

## Table 2 – Base/Performance Metering & Monitoring Incentive Calculation

Complete rows A, B and C to be included with your "base" incentive application for pre-approval. When the first year of metering and monitoring has been completed and all documentation submitted, complete row D to be included in your "data" incentive application. Once you have identified and completed subsequent projects, complete rows E, F, and G to be submitted with your "performance" Incentive Payment Request.

| | | | |
|---|---|---|---|
| **A** | $ | | Anticipated Metering & Monitoring cost |
| **B** | $ | | 25% of cost on line A |
| **C** | $ | | Maximum possible "base" incentive (capped at the lesser of Line B or $15,000 ) |
| | | | |
| **D1** | | kWh | Actual annual energy savings achieved from projects resulting from the installation of the Metering & Monitoring components. |
| **D2** | | therms | |
| **E** | $ | | Potential "performance" incentive = ($0.04 X Row D1 + $0.15 X Row D2) |
| **F** | $ | | Maximum possible "performance" incentive (capped at lesser of Line E or 75% X Line A or $20,000 ) |

## Table 3 - Impact Questionnaire

**Without the requested incentive funds, this project would not be completed because**

## Table 4 - Project Participant Survey

**Barriers to Implementation**

**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):

**Customer Factors** Please check the box if the answer to any of the questions regarding this project is yes.

| | |
|---|---|
| Yes ☐ No ☐ | Does your company have a designated Energy Manager who was involved in this project? |
| Yes ☐ No ☐ | Was this project part of a regulatory mandate? (if yes, please provide an explanation of why incentive money was needed.) |
| Yes ☐ No ☐ | Was this part of a "green" goal or specified energy reduction goal? (if yes, please provide an explanation of why incentive money was needed.) |
| Yes ☐ No ☐ | Is this project the same or similar to a project previously implemented by your company? |
| Yes ☐ No ☐ | Would you have undertaken this project in the near future even without assistance from Ameren Illinois? |
| Yes ☐ No ☐ | Would you consider this project or technology to be typical within your industry? (if no, please explain below) |
| Yes ☐ No ☐ | Are other project benefits more important than energy savings? (if yes, please provide an explanation of other benefits. |

# Metering & Monitoring Application

## Required Documentation Checklist & Terms of Agreement

**Metering & Monitoring Application Form**

- ☐ Submit a copy of the Metering & Monitoring proposal showing estimated installed cost of software and/or equipment
- ☐ Submit a copy of the structured metering & monitoring plan
- ☐ Complete all fields in the Customer and Project Information Section, Table 1 (p. 3)
- ☐ Complete the Incentive Calculation, Table 2 (p. 5)
- ☐ Complete the Impact Questionnaire and Participant Survey. Tables 3 and 4 (p. 5)
- ☐ Contact information for the designated point of contact overseeing the projects
- ☐ Certified Installer used or self-installed by Ameren Illinois customer listed on this application. Please ensure the Certified Installer is identified on the application exactly as they are registered with the Illinois Commerce Commission (for a full list, visit www.icc.illinois.gov/emdb/ucdb/search and choose Authority Type, 'EnergyEfficiency Installers.')

## 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 3rd party. Electronic signatures allowed and accepted by the Business Program. Typing your name above constitutes a valid electronic signature.*

# Metering & Monitoring Application

## Incentive Payment Request

This form is to be submitted upon project completion, defined as all equipment being installed and operable.

### Required Documentation Checklist

☐ Submit a copy of the Metering & Monitoring software/equipment invoice for "base" incentive.
☐ Complete an updated Incentive Calculation, Table 2 (p. 7), for "performance" incentive.
☐ Complete and sign this form (Incentive Payment Request)

**Type 1: Satisfactory* project(s) identified are eligible for Program incentive money.**

- *Complete and submit this form within 30 days of subsequent project completion. The "performance" incentive will be paid once we receive documentation that the subsequent project(s) have been completed. Projects must be submitted within two years following your Metering & Monitoring application "base" incentive check approval and completed within the current or following two program years, unless an extension is granted by Energy Efficiency staff.*

**Type 2: Project(s) were identified, but do not meet eligibility criteria for Program incentives (e.g., payback period is less than a year).**

- *Complete and submit this form once all subsequent projects are completed. Projects must be completed within the current or following two program years, unless an extension is granted by Energy Efficiency staff. Your "performance" Metering & Monitoring application incentive request will be evaluated for approval once we receive documentation supporting the fact that savings were identified through Metering & Monitoring data and do not meet the criteria for other Program incentives.*

**Projects must be energy-efficiency projects, equipment optimization, or process improvements, and must meet cost-effectiveness and technical criteria. If you are unsure about the eligibility of your project(s), call 1.866.800.0747 to speak with a representative about your project(s) eligibility. Ameren Illinois reserves the right to make an independent determination of whether or not project(s) are satisfactory.*

### Payment Information (check one option):

☐ Payment to the Ameren Illinois Customer listed on Page 2 of the application.

☐ Payment to Other Party:

*By my signature in the certification section, below, I (Ameren Illinois Customer) authorize payment to the following entity. I understand and agree that I will not receive the incentive payment from Ameren Illinois, and that my release of payment to a third party does not exempt me from the Program requirements and Terms and Conditions of this application.*

**Payee Company Name:**_____

**Mailing Address:** _____ **City:** _____**State:** _____ **Zip:** _____

**Contact Name:**_____ **Title:** _____

**Email:** _____ **Phone:** _____ **Fax:** _____

### Customer Certification

***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 signing below, I certify that I have authority to make these statements and submit this Application. All equipment is installed and operational.***

**Company Name (Ameren Illinois Customer):** _____

**"Base" Incentive: Software/Equipment Installation Completion Date (mm/dd/yyyy):** _____

**"Performance" Type 1: Project Number:** _____
**"Performance" Type 2: Attach Supporting Documentation**

**Print Name:** _____ **Title:** _____

**Signature:** _____ **Date: (mm/dd/yyyy)** _____

Please note the application must be signed & dated by the customer or authorized 3rd party. Certified digital signatures are accepted.
(If digital signature is not supported in your PDF software, please open this application in Adobe Acrobat Reader.)