



Received: \_\_\_\_\_ Project # \_\_\_\_\_

\_\_\_ Pre-App \_\_\_ Final App

(to be completed by IMEA)

# ILLINOIS MUNICIPAL ELECTRIC AGENCY ELECTRIC EFFICIENCY PROGRAM

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

### **Lighting Projects**

version May 1, 2017

**Program Year FY 2017-18**

**Start Date: May 1, 2017**

**Program Contact:**

**Rodd Whelpley**

Program & Communications Administrator

Illinois Municipal Electric Agency

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[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 item 5 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).
2. All materials constituting a Pre-Application are sent to Rodd Whelpley at the Illinois Municipal Electric Agency ([rwhelpley@imea.org](mailto:rwhelpley@imea.org)).
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 to be offered. **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.
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 may 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 3) and sends that to Rodd Whelpley ([rwhelpley@imea.org](mailto:rwhelpley@imea.org)). 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 bills associated with the project.
9. Rodd Whelpley reviews the final application and makes any necessary adjustments or corrections.
10. IMEA sends the applicant an incentive check.

## ILLINOIS MUNICIPAL ELECTRIC AGENCY ELECTRIC EFFICIENCY PROGRAM APPLICATION CHECKLISTS

### **Pre-Approval Application Checklist**

**Pre-Approval Application** must include:

- Completed Pre-Approval Application (found at <http://www.imea.org/EEProgram.aspx>).
- Copy of applicant's electric bill
- Signed Certification (**page 5** of this application)
- Manufacturer spec sheets for new equipment
- A project budget
- 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.

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

1. Gather materials listed above.
2. E-mail Rodd Whelpley at [rwhelpley@imea.org](mailto:rwhelpley@imea.org). Please attach all project materials as a single PDF and send in a single e-mail if possible.

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

### **Final Application Checklist**

**Final Application** must include:

- Completed Final Application (found at <http://www.imea.org/EEProgram.aspx>).
- Copy of applicant's electric bill
- Signed Certification (**page 5** of this application)
- Manufacturer spec sheets for new equipment
- Copies of all PAID invoices and receipts related to the project
- "Before" and "after" images, if requested by Program Administrator (see requirements listed in your Notice to Proceed).
- 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.

### **To Submit a Final Application**

1. Gather materials listed above and/or see any special instructions sent to you with your Notice to Proceed.
2. E-mail Rodd Whelpley at [rwhelpley@imea.org](mailto:rwhelpley@imea.org). Please attach all project materials as a single PDF and send in a single e-mail if possible.

**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 use a custom application) <b>Heating Fuel Type (check one):</b> _ Gas    _ Electric Resistance    _ Heat pump    _ Unconditioned/Exterior		
<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>
\$ _____ (Calculated in the Application – See Pages 7 - 17. The amount on the line above is the total amount on Table 10, page 17)		
<b>Other Public Incentive Funds</b>		
\$ _____ <b>Specify Other Public Funds</b>		
<b>Total Project Cost</b>		<b>Phone:</b>
\$ _____		<b>Email Address:</b>

## APPLICANT CERTIFICATIONS

NOTE: If this project is approved and completed, then IMEA will send an incentive check to the address listed on this page and in care of the signatory. 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.

Applicant hereby certifies that:

- The project site receives wholesale electric service from IMEA or electric delivery service from an IMEA member municipality or power purchaser (i.e., the Rural Electric Convenience Cooperative).
- 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).
- I understand that 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.
- Replaced equipment will be disposed of – not placed in storage.

\_\_\_\_\_  
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 4)**

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

1. Use the tables on pages 7 – 17 to calculate the IMEA Electric Efficiency Incentive Requested on page 4 of this application. Fill out only the Tables (1a – 9) that pertain to your project. (You likely won't use them all.)
2. Then use table 10 (on page 17) to add up your eligible incentive and report that on page 4.

**NOTES:**

If you have questions about the eligibility of your proposed measure, refer to the Guidelines and Instructions beginning on page 18 – see especially section 3 of the guidelines starting on page 21.

If you have questions about the Wattages of your existing equipment, you may find the following guide from Ameren Illinois useful: <http://actonenergy.com/portals/0/business/forms/lighting-wattage-guide.pdf>.

Any project taking place at a new construction site is considered a Custom Project (see Table 9, page 16).

If you still have questions, then contact Rodd Whelpley at [rwhelpley@imea.org](mailto:rwhelpley@imea.org) or call at 217-789-4632.

# 1. Commercial ENERGY STAR Compact Fluorescent (CFL) Fixtures (TRM 4.5.1)

**NOTE: You may copy this page and use it as many times as you need**

## a. **Interior** Fluorescent Fixtures

### Wattage Saved

(1) Existing Equipment	(2) Quantity of Existing Fixtures	(3) Watts of Each Existing Fixture	(4) New Equipment	(5) Quantity of Old Fixtures	(6) Watts – of Each New Fixture	(7) New Occupancy Sensor also installed (Y/N)	(8) Total Watts Saved  [(2)x(3)] - [(5)x(6)]
EXAMPLE: ISA Compliant Incandescent/Halogen	10	72	Compact Fluorescent, Screw-in	10	23	N	490
<b>Sub Total – Wattage Saved</b>							

If you have questions about the Wattages of your existing equipment, you may find the following guide from Ameren Illinois very useful:  
<http://actonenergy.com/portals/0/business/forms/lighting-wattage-guide.pdf>

### Eligible Incentive

(1) Equipment Type	(2) Incentive per Unit - \$0.25/Watt Reduced and Watts Controlled at \$0.12	(3) Watts Reduced – (From Worksheet Above)  and/or Wattage of the <u>NEW</u> Lights controlled by Sensors	(4) Eligible Incentive (2) x (3)
Interior Fluorescent Lamp	.25		
Occupancy Sensors (if applicable)	\$0.12		
<b>Total Eligible Incentive of this Measure – to Table 10 (page 17)</b>			

**1. Commercial ENERGY STAR Compact Fluorescent Lamp (CFL) (TRM 4.5.1)**

**NOTE: You may copy this page and use it as many times as you need**

**b. Exterior Fluorescent Fixtures  
Wattage Saved**

(1) Existing Equipment	(2) Quantity of Existing Fixtures	(3) Watts of Each Existing Fixtures	(4) New Equipment	(5) Quantity of Old Fixtures	(6) Watts – of Each New Fixtures	(7) New Occupancy Sensor also installed (Y/N)	(8) Total Watts Saved  [(2)x(3)] - [(5)x(6)]
EXAMPLE: ISA Compliant Incandescent/Halogen	10	72	Compact Fluorescent, Screw-in, (1) 23W lamp	10	23	N	490
<b>Sub Total – Wattage Saved</b>							

If you have questions about the Wattages of your existing equipment, you may find the following guide from Ameren Illinois useful:  
<http://actonenergy.com/portals/0/business/forms/lighting-wattage-guide.pdf>

**Eligible Incentive**

(1) Equipment Type	(2) Incentive per Unit - \$0.25/Watt Reduced and Watts Controlled at \$0.12	(3) Watts Reduced – From Worksheet Above  and/or Wattage of the <u>NEW</u> Lights controlled by Sensors	(4) Eligible Incentive (2) x (3)
Exterior Fluorescent Lamp	.25		
Occupancy Sensors	\$0.12		
<b>Total Eligible Incentive of this Measure– to Table 10 (page 17)</b>			



2. Commercial ENERGY STAR Specialty Compact Fluorescent Lamp (CFL) Fixtures (TRM 4.5.14)

**NOTE: You may copy this page and use it as many times as you need**

**Wattage Saved**

(1) Baseline Equipment	(2) Quantity of Old Fixtures	(3) Watts of Each old Fixtures	(4) Type of New Equipment to be installed	(5) Quantity of New Fixtures to be Installed	(6) Watts of Each New Fixture	(7) New Occupancy Sensor Also Installed (Y/N)	(8) Total Watts Saved = [(2)x(3)] - [(5)x(6)]	Interior (I) Or Exterior (E) Lighting
ExAMPLE: ISA Compliant Incandescent/Halogen	10	72	Compact Fluorescent, Screw-in, (1) 23W lamp	10	23	N	490	
<b>Sub Total Wattage Saved</b>								

If you have questions about the Wattages of your existing equipment, you may find the following guide from Ameren Illinois useful:  
<http://actonenergy.com/portals/0/business/forms/lighting-wattage-guide.pdf>

**Eligible Incentive**

(1) Equipment Type	(2) Incentive per Unit - \$0.35/Watt Reduced and Watts Controlled at \$0.12	(3) Watts Reduced – From Worksheet Above and/or Wattage of the <u>NEW</u> Lights controlled by Sensors	(4) Eligible Incentive (1) X (2)
Interior Specialty Fluorescent Lamp	.35		
Occupancy Sensors	\$0.12		
<b>Total Eligible Incentive of this Measure – to Table 10 (page 17)</b>			

**3. High Performance and Reduced Wattage T8 Fixtures (TRM 4.5.3)**

*Note: If and only if your project involves using fewer energy efficient lamps than are currently installed, then you may also qualify for a delamping incentive. See item number 6 below.*

**NOTE: You may copy this page and use it as many times as you need**

**Wattage Saved**

(1) Baseline Equipment	(2) Quantity of Old <u>Fixtures</u>	(3) Watts of Each Old <u>Fixture</u>	(4) Type of New Equipment to be Installed	(5) Quantity of New <u>Fixtures</u> to be Installed	(6) Watts of Each New <u>Fixture</u>	(7) New Occupancy Sensor also installed (Y/N)	(8) Total Watts Saved = [(2)x(3)] - [(5)x(6)]	Interior (I) Or Exterior (E) Lighting
ExAMPLE: 1-Lamp F34T12 w/ EEMag Ballast	10	42	1-Lamp Relamp/Reballast F34T12 w/ EEMag Ballast to HPT8	10	26.18	N	158.2	
<b>Sub Total Wattage Saved</b>								

If you have questions about the Wattages of your existing equipment, you may find the following guide from Ameren Illinois useful:  
<http://actonenergy.com/portals/0/business/forms/lighting-wattage-guide.pdf>

**Eligible Incentive**

(1) Equipment Type	(2) Incentive per Unit - \$0.40/Watt Reduced and Watts Controlled at \$0.12	(3) Watts Reduced – From Worksheet Above and/or Wattage of the <u>NEW</u> Lights controlled by Sensors	(4) Eligible Incentive (2) x (3)
T8 Fixtures and Lamps	.40		
<u>Occupancy Sensors</u>	\$0.12		
<b>Total Eligible Incentive of this Measure – to Table 10 (page 17)</b>			

**4. LED Fixtures – Including Exterior (TRM 4.5.4)**

*Note: If and only if your project involves using fewer energy efficient lamps than are currently installed, then you may also qualify for a delamping incentive. See item number 6 below.*

**NOTE: You may copy this page and use it as many times as you need**

**Wattage Saved**

(1) Baseline Equipment	(2) Quantity of Old <u>Fixtures</u>	(3) Watts of Each Old <u>Fixtures</u>	(4) Type of New Equipment to be Installed	(5) Quantity of New <u>Fixtures</u> to be Installed	(6) Watts of Each New <u>Fixture</u>	(7) New Occupancy Sensor also installed (Y/N)	(8) Total Watts Saved = [(2)x(3)] - [(5)x(6)]	Interior (I) Or Exterior (E) Lighting
EXAMPLE: 80:20 T12:Standard T8 3- Lamp 32w T8, 3- Lamp 34w T12	10	103.3	LED Troffers; 2x2 Recessed Light Fixture, 3501- 5000 lumens	10	42.8	N	605	
<b>Sub Total Wattage Saved</b>								

If you have questions about the Wattages of your existing equipment, you may find the following guide from Ameren Illinois useful:  
<http://actonenergy.com/portals/0/business/forms/lighting-wattage-guide.pdf>

**Eligible Incentive**

(1) Equipment Type	(2) Incentive per Unit - \$0.50/Watt Reduced and Watts Controlled at \$0.12	(3) Watts Reduced – From Worksheet Above  and/or Wattage of the <u>NEW</u> Lights controlled by Sensors	(4) Eligible Incentive (2) x (3)
LED Fixtures and Bulbs	.50		
<u>Occupancy Sensors</u>	\$0.12		
<b>Total Eligible Incentive of this Measure – to Table 10 (page 17)</b>			

5. Commercial LED **Interior** Exit Signs (TRM 4.5.5)

**NOTE: You may copy this page and use it as many times as you need**

**Exit Signs Installed**

(1) Existing Equipment	(2) Quantity of Equipment	(3) Wattage of Old Fixture	(4) Type of Equipment to be Installed	(5) Quantity of New Fixture	(6) Wattage of Old Fixture [(2) x (3)] – [(5) x (6)]	(7) Total Watts Saved	(8) Quantity of New Exit Signs Installed
Example: Unknown baseline (25W) - Combination of Incandescent (35W) and Fluorescent (11W)	10	25	EXIT Light Emitting Diode, (1) 10.5W lamp, Single Sided	10	10.5	145	10
<b>Sub Total Watts Saved</b>							
<b>Total Number of New Equipment Installed</b>							

**Eligible Incentive**

(1) Equipment Type	(2) Incentive per Unit - \$20/Sign	(3) Quantity of New LED Signs Installed – From Worksheet Above	(4) Eligible Incentive (2) x (3)
LED Exit Signs Installed	\$20		
<b>Total Eligible Incentive of this Measure – to Table 10 (page 17)</b>			

**6. Fluorescent Interior Delamping (TRM 4.5.2)**

*Note: If and only if your project involves retrofitting T-8s, or T-12s and you use fewer of the more efficient lamps than you had T-8s or T-12s, then use these tables to apply for an incentive for delamping.*

**NOTE: You may copy this page and use it as many times as you need**

**Fluorescent Lamps Removed**

(1) Type of Equipment Removed and Not Replaced (i.e. lamps permanently removed)	(2) Quantity of lamps to be Removed (and not replaced)	(3) Wattage of lamps Removed	(4) Total Watts Removed (2) x (3)
Delamping - 8 ft T12 llamp	10	60.3	603
<b>Sub Total Wattage Saved</b>			

If you have questions about the Wattages of your existing equipment, you may find the following guide from Ameren Illinois useful: <http://actonenergy.com/portals/0/business/forms/lighting-wattage-guide.pdf>

**Eligible Incentive**

(1) Equipment Type	(2) Incentive per Watt removed - \$0.20 replaced	(3) Watts Removed – From Worksheet Above	(4) Eligible Incentive (2) x (3)
Fluorescent Delamping	\$0.20		
<b>Total Eligible Incentive of this Measure – to Table 10 (page 17)</b>			

**7. T5 Fixtures – Including High Bay, Exterior (Retrofit – No new Construction) (TRM 4.5.12)**

**NOTE: You may copy this page and use it as many times as you need**

**Wattage Saved**

(1) Baseline Equipment	(2) Quantity of Old <u>Fixtures</u>	(3) Watts of Each <u>Fixture</u>	(4) Type of New Equipment to be Installed	(5) Quantity of New <u>Fixtures</u> to be Installed	(6) Watts – of Each New <u>Fixture</u>	(7) New Occupancy Sensor also installed (Y/N)	(8) Total Watts Saved [(2) x (3)] – [(5) x (6)]	Interior (I) Or Exterior (E) Lighting
EXAMPLE: 3- Lamp T8	10	178	4-Lamp T5 Industrial/Strip	10	128	N	500	
<b>Sub Total Wattage Saved</b>								

If you have questions about the Wattages of your existing equipment, you may find the following guide from Ameren Illinois useful:  
<http://actonenergy.com/portals/0/business/forms/lighting-wattage-guide.pdf>

**Eligible Incentive**

Equipment Type	Incentive per Unit - \$0.40/Watt Reduced and Watts Controlled at \$0.12	Watts Reduced – From Worksheet Above and/or Wattage of the <u>NEW</u> Lights controlled by Sensors	Eligible Incentive
T5 Fixtures and Bulbs	.40		
<u>Occupancy Sensors</u>	\$0.12		
<b>Total Eligible Incentive of this Measure– to Table 10 (page 17)</b>			

**8. Occupancy Sensory Lighting Controls for Interior Lighting Only** (TRM 4.5.10)

*Note: This measure applies only to projects for which you add occupancy sensors to already existing interior t-8s, t-5s or LEDs. If you are installing new t-8s, t-5s or LEDs and the new fixtures will be controlled by occupancy sensors, then indicate that occupancy sensors will be present when you fill out tables 3, 4, and 7 above.*

**NOTE: You may copy this page and use it as many times as you need**

**Watts Controlled**

(1) Type of Fixture to be Controlled with Occupancy Sensors	(2) Quantity of <u>Fixtures</u>	(3) Wattage of New <u>Fixture</u>	(4) Total Watts Controlled New Equipment (2) x (3)
EXAMPLE: 8-Lamp HPT8 w/ High-BF Ballast High-Bay	2	418.6	837.2
<b>Sub Total Watts Controlled</b>			

**Eligible Incentive**

(1) Equipment Type	(2) Incentive per Unit - \$0.12/Watt Controlled	(3) Watts Controlled – From Worksheet Above	(4) Eligible Incentive
Occupancy Sensor	\$0.12		
<b>Total Eligible Incentive of this Measure– to Table 10 (page 17)</b>			

**9. Custom Lighting Projects**

**NOTE: You may copy this page and use it as many times as you need**

**Kilowatt Hours Saved Annually**

(1) Annual Hours of Operation	(3) Description of Current Lighting	(4) Wattage of Current Fixtures	(5) Quantity of Current Fixtures	(6) Description of New Lighting	(7) Wattage of New Fixtures	(8) Quantity of New Fixtures	(9) kWh Savings [ (5)x(4)/1000 ] - [ (8)x(7)/1000 ] x(1)	Interior (I) Or Exterior (E) Lighting

If you have questions about the Wattages of your existing equipment, you may find the following guide from Ameren Illinois useful:  
<http://actonenergy.com/portals/0/business/forms/lighting-wattage-guide.pdf>

(1) Equipment Type	(2) Incentive per Unit - \$0.07/annual kWh savings	(3) Annual kWh Savings – From Worksheet Above	(4) Eligible Incentive
Custom Lighting Project	\$0.07		
<b>Total Eligible Incentive of this Measure– to Table 10 (page 17)</b>			



**10. TOTAL ELEGIBLE INCENTIVE FOR THIS APPLICATION**

*Note:* Applicants bring incentives calculated on the tables on pages 7-16 to calculate a total eligible incentive amount on this table.

<b>Measure</b>	<b>Eligible Incentive As Calculated Above</b>
<u>Interior</u> Fluorescent Lamp (from page 7)	
<u>Exterior</u> Fluorescent Lamp (from page 8)	
<u>Interior</u> Specialty Fluorescent Lamp (from page 9)	
T8 Fixtures and Lamps (from page 10)	
LED Fixtures and Bulbs (from page 11)	
LED Exit Signs Installed (from page 12)	
Fluorescent Delamping (from page 13)	
T5 Fixtures and Lamps (from page 14)	
Occupancy Sensors (from page 15)	
Custom Lighting Project (from page 16)	
<b>Total Eligible Incentive for this Application</b>	

# **GUIDELINES and INSTRUCTIONS**

**(in Three Sections)**

## **SECTION 1**

## **GENERAL INFORMATION**

**Overview.** 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. FY2017-18 of the program runs from May 1, 2017 through April 30, 2018. 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, 2017 until this form is superseded by a subsequent revision or until the program ends.

The process for applying, completing and receiving incentives for electric efficiency projects is described by the following list:

### **Steps for Applying for and Earning an IMEA Electric Efficiency Incentive**

- 1. Before you start the project or the application process, contact the program administrator to determine if funds are available for your project.** Because each IMEA city has different amounts of funding and it sometimes is very quickly used, and also because **all projects require pre-approval**, it's a good idea to contact the program administrator before making an application. E-mail or call Rodd Whelpley at [rwhelpley@imea.org](mailto:rwhelpley@imea.org) or at 217-789-4632.
  
- 2. Fill out the appropriate application.** There are six types of applications for this program, depending on the measures the applicant wishes to install. (If an electric efficiency project at a specific facility encompasses more than one "family" of electric efficiency measures, then the applicant must divide the project into multiple projects by family and submit one project application per family of measures.) The "families" and their measures are as follows.
  - **Refrigeration** (*anticipated* measures are: Commercial Solid and Glass Door Refrigerators and Freezers; Evaporator Fan Controls; Automatic Door Closers for Walk-in Coolers and Freezers; Strip Curtain for Walk-in Coolers and Freezers; Anti-sweat Heater Controls; Electronically Commutated Motors (ECM) for Walk-in and Reach-in Coolers / Freezers; Beverage and Snack Machine Controls.)
  - **HVAC** (measure is Small Commercial Programmable Thermostats)
  - **Lighting and Occupancy Controls** (measures are: Commercial ENERGY STAR Compact Fluorescent Lamps; Commercial ENERGY STAR Specialty Compact Fluorescent Lamps; High Performance and Reduced Wattage T8 Fixtures and Lamps; LED Fixtures and Bulbs – Including Exterior; Commercial LED Exit Signs; Fluorescent Delamping; LED Traffic Signals; T5 Fixtures and Lamps – Including High Bay, Exterior; Occupancy Sensor Lighting Controls; Custom Lighting Projects)
  - **Air Compressors** (measure is VSD Air Compressors)
  - **Efficient Fans and Motors** (*anticipated* measures are: Variable Speed Drives for HVAC Supply and Return Fans; Variable Speed Drives for HVAC Pumps and Cooling Tower Fans)

- **Custom Projects** (measures are: Measures not listed as one of the prescriptive measures above; IMEA will evaluate Custom Project applications and will require additional measurement and verification for all Custom Projects. IMEA will not give Notice to Proceed to any project that relies on changes in customer behavior to obtain electricity savings and is highly unlikely to give Notice to Proceed to any project for measures that are not covered in the *Illinois Statewide Technical Reference Manual for Energy Efficiency*.) **NOTE:** Any project taking place at a new construction site is considered a Custom Project.

Application forms may be found at <http://www.imea.org/EEProgram.aspx>.

A Complete Pre-Application Consists of:

1. The properly completed project application found at <http://www.imea.org/EEProgram.aspx>
  2. A project budget
  3. A copy of the applicant's electricity bill
  4. Spec sheets for new equipment and (if necessary) proof that installed measures are ENERGY STAR rated.
  5. 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.
3. **Send the application to the program administrator who will forward it to the city for pre-approval.** All projects require pre-approval. IMEA will review the pre-application and then send it to city officials for a decision on whether the project will be offered an incentive. City review of a custom project may take longer than for prescriptive projects.
  4. **IMEA (the program administrator) issues a Notice to Proceed to the applicant.** Applicants hoping to receive an incentive should not start their project before they get a Notice to Proceed. The Notice to Proceed will earmark specific funding for the project and will outline the process for completing the project and making the final application for an incentive.
  5. **Applicant does the project.** Some projects (especially custom projects) will require pre- and post-inspections. Applicants should refer to their Notice to Proceed for instructions and note any special requirements (e.g., pre- and post-inspections; before and after photo requirements; city permitting, etc.).
  6. **Applicant makes a final application.** After the project is complete and the applicant has had a post-inspection (if required), the applicant makes a final application and sends it to the program administrator. Essentially, this is the same application as the pre-application but with revised (if needed) Watts saved figures and with copies of all paid invoices relating to the project instead of a project budget. The program administrator will likely offer ways to streamline the final application process for those projects that did not deviate from how they were described in the pre-application.
  7. **IMEA will review the final application and will send the incentive check to the applicant.** After the final application is analyzed and found to be complete and acceptable, IMEA will issue the incentive payment to the applicant.

## SECTION 2

## ELIGIBILITY CRITERIA

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 (except as may be authorized as a custom project). Project paybacks must occur before the projected end of the equipment life.

**Incentive Awards.** The measure specific requirements (Section 3 below) list the incentive levels for each measure. The total incentive cannot exceed 75 percent of the total project cost. IMEA reserves the right to review applications, withhold 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. Grantees will allow officials from the IMEA Member 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 the lesser of five years or “useful life.”

**IMEA Not Liable.** Grantee 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 Grantee or by their agents or employees under a grant agreement.

**Indemnity.** The Grantee 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 Grantee'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 Grantee 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 (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, 2018 or until a grant expiration date as noted on a project's Notice to Proceed document. 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 invoices for the purchase and installation of the measures and/or product specification sheets, is required.

Applications will be screened by the Member community and the IMEA. 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.** 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 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.

### SECTION 3

### MEASURE SPECIFIC REQUIREMENTS – LIGHTING AND OCCUPANCY SENSOR CONTROLS

This application covers nine specific types of lighting and occupancy sensor electric efficiency measures. Each is described on the following pages. If your proposed lighting measure does not conform to one of the first eight following descriptions, then consider applying using a Custom Projects Application found at (found at <http://www.imea.org/EEProgram.aspx>) or item 9 of this application.

**NOTE:** These electric efficiency measures are intended as replacements or retrofits for existing lights. Projects at new construction sites are considered Custom Projects, and applicants should use a Custom Projects Application or item 9 of this application.

#### 1. Commercial ENERGY STAR Compact Fluorescent Lamp (CFL) (TRM 4.5.1)

##### Measure Description

A low wattage ENERGY STAR qualified compact fluorescent screw-in bulb (CFL) is installed in place of a baseline screw-in bulb. The CFL must be installed in a commercial location.

Federal legislation stemming from the Energy Independence and Security Act of 2007 (EISA) required all general-purpose light bulbs between 40W and 100W to be approximately 30% more energy efficient than current incandescent bulbs. Production of 100W, standard efficacy incandescent lamps ended in 2012 followed by restrictions on 75W in 2013 and 60W and 40W in 2014. The baseline for this measure has therefore become bulbs (improved incandescent or halogen) that meet the new standard.

##### Definition of Efficient Equipment

In order for this characterization to apply, the high-efficiency equipment must be a standard ENERGY STAR qualified compact fluorescent lamp.

##### Definition of Baseline Equipment

The baseline equipment is assumed to be an EISA qualified incandescent or halogen.

**Incentive**

\$0.25 per Watt reduced – interior  
\$0.25 per Watt reduced - exterior

**2. Commercial ENERGY STAR Specialty Compact Fluorescent Lamp (CFL) (TRM 4.5.14)**

**Measure Description**

An ENERGY STAR qualified specialty compact fluorescent bulb is installed in place of an incandescent specialty bulb in a commercial location.

**Definition of Efficient Equipment**

Energy Star qualified specialty CFL bulb based upon the draft ENERGY STAR specification for lamps

([http://energystar.gov/products/specs/sites/products/files/ENERGY\\_STAR\\_Lamps\\_V1\\_0\\_Draft%203.pdf](http://energystar.gov/products/specs/sites/products/files/ENERGY_STAR_Lamps_V1_0_Draft%203.pdf).)

**Definition of Baseline Equipment**

The baseline is a specialty incandescent light bulb including those exempt of the EISA 2007 standard: three-way, plant light, daylight bulb, bug light, post light, globes G40 (<40W), candelabra base (<60W), vibration service bulb, decorative candle with medium or intermediate base (<40W), shatter resistant and reflector bulbs and standard bulbs greater than 2601 lumens, and those non-exempt from EISA 2007: dimmable, globes (less than 5” diameter and >40W), candle (shapes B, BA, CA >40W, candelabra base lamps (>60W) and intermediate base lamps (>40W).

**Incentive**

\$0.35 per Watt reduced

**3. High Performance and Reduced Wattage T8 Fixtures and Lamps (TRM 4.5.3)**

**Measure Description**

This measure applies to “High Performance T8” (HPT8) lamp/ballast systems that have higher lumens per watt than standard T8 systems. This measure applies to the installation of new equipment with efficiencies that exceed that of the equipment that would have been installed following standard market practices and is applicable to time of sale as well as retrofit measures. Retrofit measures may include new fixtures or relamp/reballast measures. In addition, options have been provided to allow for the “Reduced Wattage T8 lamps” or RWT8 lamps that result in re-lamping opportunities that produce equal or greater light levels than standard T8 lamps while using fewer watts.

The measure applies to all commercial HPT8 installations excluding new construction and major renovation or change of use measures.

Time of Sale (TOS)	Retrofit (RF) and Direct Install (DI)
This measure relates to the installation	This measure relates to the replacement of

Time of Sale (TOS)	Retrofit (RF) and Direct Install (DI)
<p>of new equipment with efficiency that exceeds that of equipment that would have been installed following standard market practices. In general, the measure will include qualifying high efficiency low ballast factor ballasts paired with high efficiency long life lamps. High-bay applications use this system paired with qualifying high ballast factor ballasts and high performance 32 w lamps.</p>	<p>existing equipment with new equipment with efficiency that exceeds that of the existing equipment. In general, the retrofit will include qualifying high efficiency low ballast factor ballasts paired with high efficiency long life lamps.</p> <p>High efficiency troffers (new/or retrofit) utilizing HPT8 technology can provide even greater savings. When used in a high-bay application, high-performance T8 fixtures can provide equal light to HID high-bay fixtures, while using fewer watts; these systems typically utilize high ballast factor ballasts, but qualifying low and normal ballast factor ballasts may be used when appropriate light levels are provided and overall wattage is reduced.</p>

**Definition of Efficient Equipment**

The efficient conditions are a qualifying HP or RWT8 fixture and lamp/ballast combinations listed on the CEE website under qualifying HP T8 products (<http://library.cee1.org/content/cee-high-performance-t8-specification>) and qualifying RWT8 products (<http://library.cee1.org/content/reduced-wattage-t8-specification>).

The definition of efficient equipment varies based on the program and is defined below:

Time of Sale (TOS)	Retrofit (RF) and Direct Install (DI)
<p>High efficiency troffers combined with high efficiency lamps and ballasts allow for fewer lamps to be used to provide a given lumen output. High efficiency troffers must have a fixture efficiency of 80% or greater to qualify. Default values are given for a 2 lamp HPT8 fixture replacing a 3 lamp standard efficiency T8 fixture, but other configurations may qualify and the Calculation of savings algorithm used to account for base watts being replaced with EE watts.</p> <p>High bay fixtures must have fixture efficiencies of 85% or greater.</p>	<p>High efficiency troffers (new or retrofit kits) combined with high efficiency lamps and ballasts allow for fewer lamps to be used to provide a given lumen output. High efficiency troffers must have a fixture efficiency of 80% or greater to qualify. Default values are given for a 2 lamp HPT8 fixture replacing a 3 lamp standard efficiency T8 fixture, but other configurations may qualify and the Calculation of savings algorithm used to account for base watts being replaced with EE watts.</p> <p>High bay fixtures will have fixture efficiencies of 85% or greater.</p> <p>RWT8: 2', 3' and 8' lamps must meet the</p>

Time of Sale (TOS)	Retrofit (RF) and Direct Install (DI)
RWT8 lamps: 2', 3' and 8' lamps must meet the wattage requirements specified in the RWT8 new and baseline assumptions table. This measure assumes a lamp only purchase.	wattage requirements specified in the RWT8 new and baseline assumptions table.

**Definition of Baseline Equipment**

The definition of baseline equipment varies based on the program and is defined below:

Time of Sale (TOS)	Retrofit (RF) and Direct Install (DI)
The baseline is standard efficiency T8 systems that would have been installed. The baseline for high-bay fixtures is pulse start metal halide fixtures, the baseline for a 2 lamp high efficiency troffer is a 3 lamp standard efficiency troffer.	<p>The baseline is the existing system.</p> <p>On July 14, 2012, Federal Standards were enacted that were expected to eliminate T-12s as an option for linear fluorescent fixtures. It was assumed that the T-12 would no longer be baseline for retrofits from 1/1/2016. However, due to significant loopholes in the legislation, T-12 compliant product is still freely available and in Illinois T-12s continue to hold a significant share of the existing and replacement lamp market. Therefore the timing of the sunseting of T-12s as a viable baseline has been pushed back until 6/1/2018 and will be revisited in future.</p> <p>There will be a baseline shift applied to all measures installed before 6/1/2018.</p>

**Incentive**

\$0.40 per Watt reduced

**4. LED Fixtures and Bulbs – Including Exterior (TRM 4.5.4)**

**Measure Description**

This measure includes a variety of LED lamps including Omnidirectional (e.g. A-Type lamps), Decorative (e.g. Globes and Torpedoes) and Directional (PAR Lamps, Reflectors, MR16), and fixtures including refrigerated case, recessed and outdoor/garage fixtures, and street lights.



**Definition of Efficient Equipment**

New lamps must be Energy Star labeled. Fixtures must be Energy Star labeled or on the Design Lights Consortium qualifying fixture list (as applicable).

**Definition of Baseline Equipment**

Existing lighting.

**Incentive**

\$0.50 per Watt reduced

**5. Commercial LED Exit Signs (TRM 4.5.5)****Measure Description**

This measure characterizes the savings associated with installing a Light Emitting Diode (LED) exit sign in place of a fluorescent or incandescent exit sign in a Commercial building. Light Emitting Diode exit signs have a string of very small, typically red or green, glowing LEDs arranged in a circle or oval. The LEDs may also be arranged in a line on the side, top or bottom of the exit sign. LED exit signs provide the best balance of safety, low maintenance, and very low energy usage compared to other exit sign technologies.

**Definition of Efficient Equipment**

The efficient equipment is assumed to be an exit sign illuminated by LEDs.

**Definition of Baseline Equipment**

The baseline equipment is assumed to be a fluorescent or incandescent model.

**Incentive**

\$20 per LED exit sign

**6. Fluorescent Delamping (TRM 4.5.2)****Measure Description**

This measure addresses the permanent removal of existing 8', 4', 3' and 2' fluorescent lamps. Unused lamps, lamp holders, and ballasts must be permanently removed from the fixture. This measure is applicable when retrofitting from T12 lamps to T8 lamps or simply removing lamps from a T8 fixture. Removing lamps from a T12 fixture that is not being retrofitted with T8 lamps are not eligible for this incentive. (That is, the measure applies to "lost" T12 lamps in a T8 retrofit project, as in moving from four T-12s to two T8s with a reflector.)

Customers are responsible for determining whether or not to use reflectors in combination with lamp removal in order to maintain adequate lighting levels. Lighting levels are expected to meet the Illuminating Engineering Society of North America (IESNA) recommended light levels. Unused lamps, lamp holders, and ballasts must be permanently removed from the fixture and disposed of in accordance with local regulations.

**Definition of Efficient Equipment**

Savings are defined on a per removed lamp basis. The retrofit wattage (efficient conditioned) is therefore assumed to be zero. The lamp installed/retrofit is captured in another measure.

**Definition of Baseline Equipment**

The baseline condition is either a T12 or a T8 lamp.

**Incentive**

\$0.20 per Watt reduced

**7. T5 Fixtures and Lamps – Including High Bay, Exterior (Retrofit – No new Construction) (TRM 4.5.12)**

**Measure Description**

T5 Lamp/ballast systems have higher lumens per watt than a standard T8 or an existing T8 or T12 system. The smaller lamp diameter allows for better optical systems, and more precise control of lighting. These characteristics result in light fixtures that produce equal or greater light than standard T8 or T12 fixtures, while using fewer watts.

This measure applies to the installation of new equipment with efficiencies that exceed that of the equipment that would have been installed following standard market practices and is applicable to time of sale as well as retrofit measures.

The measure applies to all commercial T5 installations excluding new construction and substantial renovation or change of use measures.

The following table defines the applicability for different programs:

Time of Sale (TOS)	Retrofit (RF) and DI
<p>This program applies to installations where customer and location of equipment is not known, or at time of burnout of existing equipment. T5 Lamp/ballast systems have higher lumens per watt than a standard T8 system. The smaller lamp diameter allows for better optical systems, and more precise control of lighting. These characteristics result in light fixtures that produce equal or greater light than standard T8 fixtures, while using fewer watts.</p>	<p>For installations that upgrade installations before the end of their useful life. T5 Lamp/ballast systems have higher lumens per watt than a standard T8 or T12 system. The smaller lamp diameter allows for better optical systems, and more precise control of lighting. These characteristics result in light fixtures that produce equal or greater light than standard T8 or T12 fixtures, while using fewer watts and having longer life.</p>

**Definition of Efficient Equipment**

The definition of efficient equipment varies based on the program and is defined below:

Time of Sale (TOS)	Retrofit (RF) and DI
4' fixtures must use a T5 lamp and ballast configuration. High Performance Troffers must be 85% efficient or greater. T5 HO high bay fixtures must be 3, 4 or 6 lamps and 90% efficient or better.	4' fixtures must use a T5 lamp and ballast configuration. High Performance Troffers must be 85% efficient or greater. T5 HO high bay fixtures must be 3, 4 or 6 lamps and 90% efficient or better.

**Definition of Baseline Equipment**

The definition of baseline equipment varies based on the program and is defined below:

Time of Sale (TOS)	Retrofit (RF) and DI
The baseline is T8 with equivalent lumen output. In high-bay applications, the baseline is pulse start metal halide systems.	The baseline is the existing system.  In July 14, 2012, Federal Standards were enacted that were expected to eliminate T-12s as an option for linear fluorescent fixtures. However, due to significant loopholes in the legislation, T-12 compliant product is still freely available and in Illinois T-12s continue to hold a significant share of the existing and replacement lamp market. Therefore the timing of the sunseting of T-12s as a viable baseline has been pushed back until 6/1/2018 and will be revisited in a future update.

**Incentive**

\$0.40 per Watt reduced

**8. Occupancy Sensory Lighting Controls (TRM 4.5.10)**

**Measure Description**

This measure relates to the installation of new occupancy sensors on a new or existing lighting system. Lighting control types covered by this measure include wall, ceiling or fixture mounted occupancy sensors. Passive infrared, ultrasonic detectors and fixture-mounted sensors or sensors with a combination thereof are eligible. Lighting controls required by state energy codes are not eligible. This must be a new installation and may not replace an existing lighting occupancy sensor control.

**Definition of Efficient Equipment**

This measure is intended for controlling interior lighting only. Lighting control types covered by this measure include wall, ceiling or fixture mounted occupancy sensors. Passive infrared, ultrasonic detectors and fixture-mounted sensors or sensors with a combination thereof are eligible.

**Definition of Baseline Equipment**

The baseline is assumed to be a lighting system uncontrolled by occupancy sensors.

**Incentive**

\$0.12 per Watt controlled

**9. Custom Lighting Project****Measure Description**

This measure relates to the installation of new, more efficient lighting to replace less efficient lighting. Applicants should only apply for a custom project when proposed new equipment is not properly described in any of the other lighting measures described by the program. New construction projects are all considered as custom projects.

NOTE: Custom projects will require a pre-and post-inspection.

**Definition of Efficient Equipment**

Applicants should only apply for a custom project when proposed new equipment is not properly described in any of the other lighting measures described by the program.

**Definition of Baseline Equipment**

The baseline is assumed to be the existing lighting as described by the applicant, or – for new construction – the lighting required by Code.

**Incentive**

\$0.07 per deemed annual kWh saved