



Received: _____ Project # _____ Pre-App ___ Final App ___

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

ILLINOIS MUNICIPAL ELECTRIC AGENCY RESIDENTIAL AIR SOURCE HEAT PUMP and/or CENTRAL AIR CONDITIONER PROGRAM

START-UP KIT FOR IMEA MEMBER MUNICIPALITIES

REVISED: January 28, 2026

NOTE: IMEA Member Municipalities use this application to establish a municipally managed Residential Air Source Heat Pump and/or Central Air Conditioning Program.)

**Program Year FY 2025-26
May 1, 2025 – April 15, 2026**

Program Contact:

Rodd Whelpley
Program & Communications Administrator
Illinois Municipal Electric Agency
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HOW THE IMEA INCENTIVE REBATE PROGRAM OPERATES FOR MUNICIPALLY MANAGED RESIDENTIAL AIR SOURCE HEAT PUMP and/or CENTRAL AIR CONDITIONING PROGRAMS

1. *IMEA Member Municipal Utilities use this application to set aside a specific amount of their IMEA Electric Efficiency Program Funding for a locally administered residential air source heat pump and/or central air conditioning program.*

IMEA Members may use some or all of their Electric Efficiency Program funding to establish a locally managed program to incentivize the installation of residential air source heat pumps and/or central air conditioning units.

The Member may choose to:

- a) Establish only a residential air source heat pump program.
- b) Establish only a residential central air conditioner program.
- c) Establish both a residential air source heat pump program and a residential central air conditioner program.
- d) Establish neither program: Using any part of the city's IMEA Electric Efficiency Program funding to establish any locally administered residential electric efficiency program is optional and up to the municipality to decide.

Qualified Air Source Heat Pumps for this Program Are ([see TRM 13.0, Vol 3, 5.3.1](#)):

A new residential sized ($\leq 65,000$ Btu/hr) air source heat pump with specifications determined by the program according to this incentive schedule:

Residential Air Source Heat Pumps	
Efficient Measure Type	Incentive
Ducted Air source heat pump 17.1 \geq SEER2 \geq 15.2 and \geq 8.1. HSPF2	\$1,200
Ducted Air source heat pump SEER2 $>$ 17.1 and \geq 8.1. HSPF2	\$1,600
Ductless Heat Pump 2 $>$ Tons $>$ 0 and \geq 8.1. HSPF2	\$1,000
Ductless Heat Pump 3 $>$ Tons \geq 2 and \geq 8.1. HSPF2	\$1,000
Ductless Heat Pump Tons \geq 3 and \geq 8.1. HSPF2	\$1,000
Minisplit Heat Pump 2 $>$ Tons $>$ 0 and \geq 8.1. HSPF2	\$1,000
Minisplit Heat Pump 3 $>$ Tons \geq 2 and \geq 8.1. HSPF2	\$1,000
Minisplit Heat Pump Tons \geq 3 and \geq 8.1. HSPF2	\$1,000

Qualified Central Air Conditioners for this Program Are ([see TRM 13.0, Vol 3, 5.3.3](#)):

A residential sized ($\leq 65,000$ Btu/hr) central air conditioning unit meeting specifications as delineated in this incentive schedule:

Central Air Conditioner	
Efficient Measure Type	Incentive
Central Air Conditioning 16.2 $>$ SEER2 \geq 15.2	\$800
Central Air Conditioning SEER2 \geq 16.2	\$800

2. ***IMEA reviews the pre-application and, when all is in order and acceptable, issues a Notice to Proceed***, which sets aside an amount of the Member's IMEA Electric Efficiency Program Funding as a reimbursement for incentives that the city makes to residents who participate in the municipal air source heat pump and/or residential central air conditioning program.

With the Notice to Proceed the local program manager will also receive a copy of the Energy Savings Calculator for air source heat pumps and central air conditioning and may need to complete a training session on its use.

3. ***The city creates and manages the residential air source heat pump and/or central air conditioner program for its residential customers.*** Specifically, the municipality:

- Creates and accepts application forms, advertises the program to residents, administers the program and tracks program uptake and deemed energy savings achieved. **NOTE:** The city is responsible for assuring that the total amount paid as incentives to residential customers does not exceed the amount authorized by IMEA in the Notice to Proceed. (The city's residential air source heat pump and/or central air conditioner program either must end once all the allocated funds are distributed to residents or the city can amend its pre-application to set aside more of its electric efficiency funds for the program.)
- Takes in applications from its residents and approves or rejects them.
- As part of the approval process, the city verifies the purchase and installation of qualified units at qualified city residences.

4. ***The city keeps data in the form of a spreadsheet.***

These Excel spreadsheets must be turned in to IMEA as part of any request for reimbursement of the incentives that the utility pays to customers.

For the Air Source Heat Pump Measure, Spreadsheet Data Columns May Include:

- The name of the resident.*
- The qualified residential location.*
- The make (e.g. Trane, York etc.) of the air source heat pump (gathered from receipt or sales slip)*
- The model number (if possible) of the air source heat pump (gathered from receipt or sales slip)*.
- Year of manufacture of the air source heat pump.
- The installation date of the air source heat pump (gathered from receipt or sales slip).*
- The purchase price of the air source heat pump (gathered from receipt or sales slip).
- The cooling capacity of the air source heat pump (in Btu/hr).*
- The heating capacity of the air source heat pump (in Btu/hr).*
- Whether the heat pump is Ducted, Ductless, or Minisplit*
- The Seasonal Energy Efficiency Ratio (SEER2) of the air source heat pump.*
- The Energy Efficiency Ratio (EER2) of the air source heat pump.*

- The Heating Seasonal Performance Factor (HSPF2) of the air source heat pump.*
- The amount of the incentive paid to the resident.*
- The method of the incentive paid to the resident (e.g., check or bill credit).
- The date the unit was inspected by the city.
- The date the incentive was paid to the resident.*
- The annual energy savings attributable to the unit.*
- The kW savings at the time of city peak attributable to the unit.*

*** These are required fields.**

NOTE: Each incentivized unit is recorded on its own row of the spreadsheet (even if the customer installs – and is incentivized for – more than one unit in the same location).

NOTE: Failure to provide all necessary information required for a unit may jeopardize the city's IMEA reimbursement for the residential incentive paid for that unit.

The city keeps this information ready to include with the Final (or no more than quarterly) applications to the IMEA for reimbursement of incentives the city has paid to participating residents.

The city should also retain copies of customer receipts for the purchase and installation of the units (although IMEA does not foresee ever requesting these from the city).

For the Central Air Conditioner Measure, Spreadsheet Data Columns Should Include:

- The name of the resident.*
- The qualified residential location.*
- The make e.g., Trane, York, etc.) of the central air conditioner (gathered from receipt or sales slip).*
- The model number (if possible) of the central air conditioner (gathered from receipt or sales slip).*
- The installation date of the central air conditioner (gathered from receipt or sales slip).*
- The purchase price of the central air conditioner (gathered from receipt or sales slip).
- The cooling capacity of the central air conditioner (in Btu/hr).*
- The Seasonal Energy Efficiency Ratio (SEER2) of the central air conditioner.*
- The Energy Efficiency Ratio (EER2) of the central air conditioner.*
- The amount of the incentive paid to the resident.*
- The method of the incentive paid to the resident (e.g., check or bill credit).
- The date the unit was inspected by the city.
- The date the incentive was paid to the resident.*
- The annual energy savings attributable to the unit.*
- The kW savings at the time of city peak attributable to the unit.*

*** These are required fields.**

NOTE: Each incentivized unit is recorded on its own row of the spreadsheet (even if the customer installs – and is incentivized for – more than one unit in the same location).

NOTE: Failure to provide all necessary information required for a unit may jeopardize the city's IMEA reimbursement for the residential incentive paid for that unit.

The city keeps this information ready to include with the Final (or no more than quarterly) applications to the IMEA for reimbursement of incentives the city has paid to participating residents.

The city should also retain copies of customer receipts for the purchase and installation of the units (although IMEA does not foresee ever requesting these from the city).

5. ***The city incentivizes the resident:*** Incentives may be made to the resident via a check from the city or via a credit on the resident's utility bill. (**NOTE:** Under this program, IMEA will not make checks to residents. Incentives to residents are the sole responsibility of the city.)
6. ***The city applies for a final (or periodic) incentive reimbursement from IMEA:*** The city may elect to make an application for funds from IMEA either:
 - a) When all funds set aside for the residential air source heat pump and/or central air conditioner program have been distributed to residents, or
 - b) On a periodic (but no more than quarterly) basis, as agreed to by the city and IMEA.

To make an application for funds from IMEA, the city sends a memo to Rodd Whelpley (rwhelpley@imea.org) that includes:

- A request for reimbursement to the city from IMEA and the total amount requested.
- The number of incentivized air source heat pump and/or central air conditioning units for which the city is requesting reimbursement.
- The number of households in which the measures were installed.
- A spreadsheet (or spreadsheets, if the utility is offering both measures) containing (at least) the data points listed in item 4 above.

NOTE: If the city elects to collect funds from IMEA on a periodic basis, then, likely only part of the funds set aside by the Notice to Proceed will be paid out in a single period. However, at each period, IMEA and the city will track the total amount of incentives IMEA has paid to the city over the course of the periods thus far and how much of the allocated incentive amount (as reflected in the program's Notice to Proceed) remains to be used by the city. In total, IMEA will not pay out an amount that is greater than the Notice to Proceed for the residential program. (The city's residential air source heat pump and/or central air conditioner program either must end once all the allocated funds are distributed to residents or the city can amend its pre-application to set aside more of its electric efficiency funds for the residential program to continue. This must be done in consultation with the IMEA program director.)

7. ***IMEA reviews the final (or periodic) incentive request, resolves any issues, and pays the city.***

**ILLINOIS MUNICIPAL ELECTRIC AGENCY ELECTRIC EFFICIENCY PROGRAM
PRE-APPLICATION CHECKLIST – MUNICIPALLY MANAGED RESIDENTIAL AIR SOURCE
HEAT PUMP and/or CENTRAL AIR CONDITONER PROGRAM**

Pre-Approval Application Checklist

Pre-Approval Application must include:

- ☐ Completed Pre-Approval Application – the cover page and pages 6, and 8-10 of this application. (Found at <https://www.imea.org/EE%20Incentives.asp>.)
- ☐ Ancillary materials listed on page 10 item 2 of this application.

To Submit a Pre-Application

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

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

ILLINOIS MUNICIPAL ELECTRIC AGENCY ELECTRIC EFFICIENCY PROGRAM
FINAL APPLICATION CHECKLISTS – MUNICIPALLY MANAGED RESIDENTIAL AIR
SOURCE HEAT PUMP and/or CENTRAL AIR CONDITONER PROGRAM

Final Application Checklist

Final Application must include:

- ☐ A memo that includes: a) request for reimbursement to the city from IMEA and the total amount requested; b) the number of incentivized air source heat pumps and/or central air conditioning units for which the city is requesting reimbursement; c) the number of households in which the measures were installed
- ☐ FOR AIR SOURCE HEAT PUMPS: A spreadsheet that includes (at least) the following data fields for each unit:
 - ☐ The name of the resident.
 - ☐ The qualified residential location.
 - ☐ The installation date of the air source heat pump (gathered from receipt or sales slip).
 - ☐ The make of the air source heat pump (e.g., Trane, York, etc.)
 - ☐ The model number of the air source heat pump
 - ☐ The installation date of the air source heat pump
 - ☐ The cooling capacity of the air source heat pump (in Btu/hr).
 - ☐ The heating capacity of the air source heat pump (in Btu/hr).
 - ☐ Indicate whether the air source heat pump is: ducted, ductless, or minisplit
 - ☐ The Seasonal Energy Efficiency Ratio (SEER2) of the air source heat pump.
 - ☐ The Energy Efficiency Ratio (EER2) of the air source heat pump.
 - ☐ The Heating Seasonal Performance Factor (HSPF2) of the air source heat pump.
 - ☐ The amount of the incentive paid to the resident.
 - ☐ The annual kWh savings attributable to the new, more efficient ASHP.
 - ☐ The kW savings at the time of city peak savings attributable to the new, more efficient ASHP
 - ☐ The date the incentive was paid to the resident.

NOTE: Each incentivized unit is recorded on its own row of the spreadsheet (even if the customer installs – and is incentivized for – more than one unit in the same location).

NOTE: Failure to provide all necessary information required for a unit may jeopardize the city's IMEA reimbursement for the residential incentive paid for that unit.

- ☐ FOR CENTRAL AIR CONDITIONERS: A spreadsheet that includes (at least) the following data fields for each unit:
 - ☐ The name of the resident.
 - ☐ The qualified residential location.
 - ☐ The make of the central air conditioner (e.g., Trane, York, etc.)
 - ☐ The model number of the central air conditioner
 - ☐ The installation date of the central air conditioner (gathered from receipt or sales slip).
 - ☐ The cooling capacity of the central air conditioner (in Btu/hr).
 - ☐ The Seasonal Energy Efficiency Ratio (SEER2) of the central air conditioner.
 - ☐ The Energy Efficiency Ratio (EER2) of the central air conditioner.
 - ☐ The amount of the incentive paid to the resident
 - ☐ The annual kWh savings attributable to the new, more efficient Central AC
 - ☐ The kW savings at the time of city peak savings attributable to the new, more efficient Central AC
 - ☐ The date the incentive was paid to the resident.

NOTE: Each incentivized unit is recorded on its own row of the spreadsheet (even if the customer installs – and is incentivized for – more than one unit in the same location).

NOTE: Failure to provide all necessary information required for a unit may jeopardize the city's IMEA reimbursement for the residential incentive paid for that unit.

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 them to Rodd Whelpley at rwhelpley@imea.org.

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

APPLICANT AND PROJECT INFORMATION

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

Name of Applicant – IMEA Member Municipality	
Proposed Start Date:	Planned Completion Date:
Project Manager:	
Telephone #:	Email Address:
<p style="text-align: center;">The Program is For (check one):</p> <p><input type="checkbox"/> Air Source Heat Pumps only <input type="checkbox"/> Central Air Conditioners only <input type="checkbox"/> Both Air Source Heat Pumps and Central Air Conditioners</p> <p style="text-align: center;">Total IMEA Electric Efficiency Incentive Requested</p> <p>\$ _____</p> <p>This is the amount of your IMEA Electric Efficiency Program Funding you want to use for a locally administered residential air source heat pump and/or central air conditioner program.</p>	<p style="text-align: center;">Incentive Payment Schedule Requested</p> <p>The municipality will make applications for incentive payments (check one):</p> <p><input type="checkbox"/> When the program is finished</p> <p><input type="checkbox"/> On a semi-annual basis, on or about the following dates:</p> <p>_____</p> <p>_____</p> <p><input type="checkbox"/> On a quarterly basis, on or about the following dates:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>

APPLICANT CERTIFICATIONS

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

Applicant hereby certifies and understands that:

- The project site receives wholesale electric service from IMEA or electric delivery service from an IMEA member municipal electric system.
- 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 rebate 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)

NARRATIVE DESCRIPTION OF THE PROJECT AND ADDITIONAL REQUIRED MATERIALS

1. In the space below (or as a separate attachment) please provide a short narrative of how your residential air source heat pump and/or central air conditioner program will operate.
2. Include with your pre-application to IMEA:
 - a) The application your residents will use to receive an incentive from the city. **This is REQUIRED.** See appendix A (Air Source Heat Pump) and Appendix B (Central Air Conditioners) for examples. You may want to model your city’s applications on these appendices, or more likely, create your own.
 - b) The excel spread sheet you will use to track program results – use all the required rows (see pages 3 and 4 of this application). **This is REQUIRED.**
 - c) A copy of the content of – or a link to – your residential air source heat pump and/or central air conditioner program’s Web page. *This is useful, but optional.*
 - d) Any other ancillary materials that advertise or explain your residential air source heat pump and/or central air conditioner program. *This is useful, but optional.*

APPENDIX A – Sample Residential Air Source Heat Pump Application **REVISED**

<CITY or VILLAGE HERE>

Residential Air Source Heat Pump Incentive Program Application

<Program dates here>

Fill Out One Application Per Unit

Qualified Air Source Heat Pumps for this Program Are:

New residential sized ($\leq 65,000$ Btu/hr) air source heat pump with specifications that meet or exceed these incentive baselines:

Specifications for incentivized units:

Ducted units:

With a SEER2 between 15.2 and 17.1 and ≥ 8.1 HSPF2 = \$1,200.00 incentive

With a SEER2 greater than 17.1 and ≥ 8.1 HSPF2 = \$1,600.00 incentive

NOTE: Units with a SEER2 less than 15.2 and/or an HSPF2 less than 8.1 do not qualify.

Applicant will need to provide SEER2, EER2, HSPF2 and the heating and cooling capacity (in Btus) of the unit. (Btus can be converted from tonnage)

Ductless units:

Ductless heat pumps = \$1,000.00 incentive

NOTE: Units with an HSPF2 less than 8.1 do not qualify.

Applicant will need to provide SEER2, EER2, HSPF2 and the heating and cooling capacity (in Btus) of the unit. (Btus can be converted from tonnage)

Minisplit units:

Minisplit heat pumps = \$1,000.00 incentive

NOTE: Units with an HSPF2 less than 8.1 do not qualify.

Applicant will need to provide SEER2, EER2, HSPF2 and the heating and cooling capacity (in Btus) of the unit. (Btus can be converted from tonnage)

REQUIRED CUSTOMER INFORMATION

Customer Receiving the Rebate: _____

Primary Contact

Phone and/or e-mail

Installation Address:

Account Number:

Date Heat Pump Was Installed:

Date of Application:

AIR SOURCE HEAT PUMP SPECIFICATIONS

You Must Attach a Copy of the Spec Sheets and a Sales Receipt for this Unit (Note: One unit per application.)

Heat Pump Make/Brand: _____

Heat Pump Model Number: _____

This Heat Pump (choose one)

___ Completely replaces the existing furnace or boiler

___ Will be used with the existing furnace, boiler or heating system remaining as a backup

Heat Pump is (choose one)

___ Ducted ___ Ductless ___ Minisplit

Cooling Capacity = _____ Btu/hr (Note: tonnage of unit x 12,000 = Btu/hr)

Heating Capacity = _____ Btu/hr (Note: tonnage of unit x 12,000 = Btu/hr)

SEER2 = _____

EER2 = _____

HSPF2 = _____ (NOTE: Units with an HSPF2 less than 8.1 do not qualify.)

INCENTIVE REQUESTED FOR THIS UNIT (check the description that most closely matches the specifications of your Air Source Heat Pump)

Note: City will check this request against spec sheets and make the final determination of the eligible incentive amount.

___ Ducted unit with a SEER2 between 15.2 and 17.1	= \$1,200.00 incentive
___ Ducted unit with a SEER2 greater than 17.1	= \$1,600.00 incentive
___ Ductless unit	= \$1,000.00 incentive
___ Minisplit unit	= \$1,000.00 incentive

1.

CUSTOMER SIGNATURE AND CERTIFICATION

I certify that I have purchased the equipment described in this form and that it has been installed at the service address indicated. I agree to the terms and conditions.

Customer Signature

Date

FOR <CITY or VILLAGE> USE ONLY:

Date Application Received: _____
Date Installation was inspected and inspector's initials: _____
Date Application Reviewed and Deemed Complete: _____
Approved Amount of Eligible Rebate _____
Date Rebate Sent to Customer: _____
Form of Rebate (check or bill credit): _____
Date Project Information Entered into Program Spreadsheet
(required by IMEA to be turned in at the end of the program): _____

Processed by: _____

APPENDIX B – Sample Residential Central Air Conditioner Application **REVISED**

<CITY or VILLAGE HERE>

Residential Central Air Conditioning Incentive Program Application

<Program dates here>

Fill Out One Application Per Unit

Qualified Central Air Conditioners for this Program Are:

A residential sized ($\leq 65,000$ Btu/hr) central air conditioning unit with specifications that meet or exceed these incentive baselines:

Central air conditioning unit with a SEER2 between 15.2 and 16.2 = \$800 incentive

Central air conditioning unit with a SEER2 greater than 16.2 = \$800 incentive

NOTE: Units with SEER2 levels below 15.2 do not qualify.

Units with a cooling capacity greater than 65,000 Btu/hr (5.42 tons) do not qualify

Applicants will need to provide the Btu cooling capacity (or tonnage), the SEER2 and EER2 of the unit.

REQUIRED CUSTOMER INFORMATION

Customer Receiving the Rebate: _____

Primary Contact

Phone and/or e-mail

Installation Address:

Account Number:

Date Central AC Was Installed:

Date of Application:

Central AC SPECIFICATIOS

You Must Attach a Copy of the Spec Sheets and a Sales Receipt for this Unit (Note: One unit per application.)

Central AC Make/Brand: _____

Central AC Model Number: _____

Cooling Capacity = _____ Btu/hr (Note: tonnage of unit x 12,000 = Btu/hr)

SEER2 = _____

EER2 = _____

INCENTIVE REQUESTED FOR THIS UNIT (check the description that most closely matches the specifications of your Air Source Heat Pump)

Note: City will check this request against spec sheets.

____ Qualified residential-sized central air conditioner with a SEER2 greater than 15.2 = \$800.00

2.

CUSTOMER SIGNATURE AND CERTIFICATION

I certify that I have purchased the equipment described in this form and that it has been installed at the service address indicated. I agree to the terms and conditions.

Customer Signature

Date

FOR <CITY or VILLAGE> USE ONLY:

Date Application Received: _____

Date Installation was inspected and inspector's initials: _____

Date Application Reviewed and Deemed Complete: _____

Approved Amount of Eligible Rebate _____

Date Rebate Sent to Customer: _____

Form of Rebate (check or bill credit): _____

Date Project Information Entered into Program Spreadsheet _____

(required by IMEA to be turned in at the end of the program): _____

Processed by: _____