

Multifamily Market Rate Energy Efficiency Program Guidelines

Ameren Missouri's Multifamily Market Rate Program offers incentives for a variety of energy-efficient facility upgrades. The following program guidelines detail participation eligibility, program timelines, the participation process and energy-efficient equipment eligibility.

1. Objective

The Multifamily Market Rate Program provides multifamily property owners with incentives to reduce operating costs, reduce energy use and provide for enhanced tenant comfort and reduced energy costs. By generating awareness of and facilitating participation in this energy efficiency program, Ameren Missouri and its implementation partners seek to improve the environment, increase grid reliability and reduce the need for additional energy generation by improving customer energy efficiency.

2. Program Timeline

The Program start date is January 1, 2023.

The Program end date is December 31, 2023.

3. Eligibility

3.1 Participant Eligibility

Participating customers must be multifamily properties including three or more units receiving Ameren Missouri electric service.

Participating customers must offer leases of at least six months (long-term residential rentals) and may include:

- Independent Senior Living Apartments
 - Qualifying communities do not provide on-site medical services (rehabilitation, memory care, assisted living, pharmacy, etc.)
- Facilities with individual residential meters serving housing units
 - This includes facilities where common areas are on commercial meters

For residences including three or fewer units in a townhome or duplex-style layout, energy-efficient products are available through the Ameren Missouri Store and through Trade Ally partners. More information is available on AmerenMissouriSavings.com.

3.2 Contractor Eligibility

Contractors interested in providing installation services eligible for Multifamily Market Rate Program incentives must submit a signed participation agreement designating them as a Program Trade Ally. Contractors interested in joining as Trade Allies will receive additional training to effectively deliver project services to customers. Contractors interested in becoming a program-approved Trade Ally should email MultifamilySavings@AmerenMissouri.com.

3.3 Payee Eligibility

Incentive payments may be made by check to Trade Allies or eligible Ameren Missouri customers as identified as the payee on customer-signed Incentive Completion Forms. Customers may approve of but not receive incentives directly if the Trade Ally is the designated payee and will only be responsible for co-pays when applicable.

3.4 Equipment Eligibility

Prescriptive incentives are paid on a per-unit installed basis. More information on qualifying equipment and the associated incentive rates can be found on the Ameren Missouri Multifamily Market Rate Program Website and in the Multifamily Market Rate Program Brochure.

Custom incentives are available for equipment not among those on the prescriptive incentives list in the Multifamily Market Rate Program Brochure. Incentives are subject to engineering review and will require additional detail and documentation for accurate incentive and savings calculations. Incentives are subject to change at the Program's discretion and are limited in availability.

3.5 Project Eligibility

All projects applying for Ameren Missouri Multifamily incentives must receive pre-approval from the Program prior to equipment purchase or installation. Customers working with contractors or Trade Allies should ensure pre-approval is received prior to the purchase or installation of efficient equipment.

Customers purchasing equipment directly and using facility or maintenance staff to install equipment should contact Program staff to begin enrollment, verify eligibility and receive Program approval.

Facility and measure information will be reviewed by Program staff and will receive approval based on fulfillment of eligibility requirements, technical review, and compliance with Program guidelines, measure guidelines and Program terms and conditions. Following approval, an Incentive Reservation Form will be issued. A customer-signed Incentive Reservation Form must be received by the Program prior to project installation.

Following the completed installation of efficient equipment, an Incentive Completion Form will be issued to be signed and returned with associated documentation to qualify for an incentive. Projects must be completed within six months of the signing of the Incentive Reservation Form. Exceptions may be made in situations of equipment shortage, or provided that the project is moving forward on a longer-than-anticipated timeline.

4. Program Participation

4.1 Establish Eligibility

Prior to purchasing and installing equipment, several steps must be taken to ensure eligibility for incentives.

1. Customers or contractors must contact the Program to ensure facility eligibility for Multifamily Market Rate Program incentives
2. The list of incentive-eligible equipment on the Multifamily Market Rate Program Brochure should be reviewed to ensure the selection of incentive-eligible measures for installation
3. Information must be submitted for pre-approval by:
 - a. Working with a contractor or Trade Ally, who can input facility and measure information to generate an Incentive Reservation Form
 - b. Contacting the Program to receive assistance entering facility and measure information to generate an Incentive Reservation Form

4.2 Program and Customer Approval

Pre-approval must be obtained prior to the purchase or installation of equipment. After a facility's energy efficiency opportunities are identified, projects will be reviewed by Program personnel and incentives will be calculated based on existing equipment, the equipment being installed and the anticipated energy savings or the prescriptive measures selected.

Upon determining that measures fulfill eligibility requirements, meet technical review standards, pass inspections and comply with program terms and conditions, an Incentive Reservation Form will be issued within ten business days.

Incentive Reservation Forms will detail the suggested energy efficiency upgrades, project costs, incentives, and any co-pays which the customer will be responsible for paying. Customers may either sign the Incentive Reservation Form or negotiate a more limited project scope with the Trade Ally or contractor.

Once the customer has signed the Incentive Reservation Form, it must be returned to the Program and must be accompanied by:

- Up-to-date rent roll, containing all addresses or Ameren Missouri account numbers associated with buildings where efficient equipment will be installed
- Verification of existing equipment to be replaced with efficient equipment for accurate incentive calculation, which can be accomplished via a picture of the existing equipment provided by your Trade Ally or Program Representative

4.3 Installation

Upon customer approval of the final scope of work and submission of relevant paperwork, customer staff or selected contractors or Trade Allies may begin the purchase and installation of the upgrades to facilities and help train property personnel and maintenance staff on proper use and maintenance.

4.4 Project Completion

Following the completion of energy-efficient equipment installation, an accurate accounting of the final measures installed must take place and be input to the Program's project management system. If working with a contractor or Trade Ally, they will be able to update installed measures. If facility staff conducted the efficient equipment installation, customers should work with Program personnel to input final installed measures to identify any changes from the agreed-upon scope in the signed Incentive Reservation Form.

After the final installed measures have been input, an Incentive Completion Form will be generated and must be signed by the customer and resubmitted to the Program along with the following documents for review and incentive processing:

1. Itemized invoice if project completed by contractor or Trade Ally, including
 - a. Installation (labor) price
 - i. Note: Labor time of property staff is not eligible for inclusion in total project cost
 - b. Equipment (material) price
 - c. Miscellaneous support equipment price
 - d. Disposal fees
 - e. Full project incentive
2. Equipment (material) specification information, including model numbers
3. Photographs of installed efficient equipment
4. Other supporting documentation as outlined in Program guides and field protocols

If the project was self-installed, please include receipts detailing the same information summarized above. All existing equipment must be removed from the property and decommissioned and/or disposed of in accordance with EPA standards.

4.5 Incentive Payment

Program staff will review Incentive Completion Form and associated supporting documentation to verify energy savings and incentive eligibility. Once the technical review has been completed, Program staff will submit for final approval and issue incentive payment within 6-8 weeks of receipt of final approval.

5. Incentives

5.1 Incentive Information

Incentives are provided on a first-completed, first-served basis and are subject to the availability of program funds. Program review is required to determine equipment eligibility and pre-inspection documentation is required to verify existing equipment for incentive calculations. Program personnel will calculate incentive amounts based on incentive rates in effect during the year in which they were submitted for review and approval.

Signed Incentive Reservation Form must be accompanied by an up-to-date rent roll, containing all addresses or Ameren Missouri account numbers associated with buildings where efficient equipment will be installed. A signed Incentive Reservation Form does not guarantee incentive payment if funds are exhausted by completed projects.

Incentive Completion Form must be accompanied by supporting documentation including, but not limited to, photos of installed equipment and equipment specifications for all incentivized equipment installed to verify incentive calculations.

5.2 Incentive Caps

Incentives are subject to the following maximum allotments:

- \$100,000 annual electric incentive cap per customer
 - Exceptions may be made with approval from Ameren Missouri and Program Administrator
- Project incentives may not exceed 75% of total project cost
 - Labor time of property staff is not eligible for inclusion in total project cost