

## SBDI INCENTIVE PROGRAM GUIDELINES

### 1.1 DESCRIPTION

The Small Business Direct Install (SBDI) Incentive Program offers prescriptive incentives, application processing, and a service provider network specifically designed to support small businesses and their ability to achieve energy efficiency measures on a per-unit basis. There are incentives available for a variety of qualified energy efficient improvements.

### 1.2 OBJECTIVE

The primary objective of the SBDI Incentive Program is to remove participation barriers for small businesses through a simple and streamlined process. This program will provide awareness of energy efficiency opportunities, an incentive level to support small business customers' ability to achieve these savings, and a simple process for these customers to receive installed efficient technologies that will produce verifiable energy savings.

### 1.3 DATES AND TIMELINES

- The Program start date is January 1<sup>st</sup>, 2023.
- The last day to submit completion paperwork is December 31<sup>st</sup>, 2023.
- Applications must be received within 90 days of the invoice date in order to qualify for an incentive.

### 1.4 ELIGIBILITY

#### 1.4.1 Participant Eligibility

Commercial electric customers of Ameren Missouri that are classified under one of the following rates are eligible to apply for incentives for measures installed at their location:

- Small General Service Rate 2(M)

#### 1.4.2 Payee Eligibility

Ameren Missouri customers eligible for the SBDI Incentive Program must authorize the project and authorize payment to an approved Ameren Missouri SBDI Service Provider within the SBDI application. The SBDI Service Provider will identify the approved incentive amount as a credit on the invoice delivered to the customer.

**Note:** Upon receiving a completed application, the BizSavers Team may contact the customer to verify implementation of project measures prior to processing the application.

### 1.4.3 Approved SBDI Service Providers

To be eligible for the SBDI Incentive Program, customers must use an approved SBDI Service Provider. Contractor participation is restricted to Ameren Missouri BizSavers Trade Allies approved for the 2019-2021, 2022, 2023 program cycle who have also been approved as an SBDI Service Provider.

For a list of approved SBDI Service Providers please visit [AmerenMissouri.com/BizSavers](https://AmerenMissouri.com/BizSavers).

For information on how to become an approved SBDI Service Provider please contact the Ameren Missouri BizSavers Team at [BizSavers@ameren.com](mailto:BizSavers@ameren.com).

### 1.4.4 Equipment eligibility

SBDI Service Providers will provide a list of eligible energy efficient equipment that qualifies for an SBDI incentive. Energy efficient equipment that is not eligible through the SBDI Incentive Program may still be eligible in other Ameren Missouri BizSavers Programs.

Equipment qualifying under the SBDI Incentive Program may not be purchased or installed prior to the start date of the program.

Ameren Missouri electric business customers are not eligible for incentives on:

- Any equipment already discounted through either the Ameren Missouri Residential Energy Efficiency Programs or any other Ameren Missouri BizSavers Programs.
- Any equipment for which the facility type and scope of work qualify for incentives via the multifamily market rate or income-qualified programs.

**Note:** Please see the list of participating stores for the Residential Program on [AmerenMissouri.com](https://AmerenMissouri.com) and be aware of point-of-purchase advertising as an indication of products that may have already received a Residential Incentive. For questions about whether a certain facility or equipment type is eligible for an incentive please contact the BizSavers program office at 1.866.941.7299 or [BizSavers@ameren.com](mailto:BizSavers@ameren.com). Please have the product and/or site details (ex. store name, product SKU, installed site address) available for review.

### 1.4.5 Project eligibility

SBDI Incentive Program applications will be approved based on fulfillment of eligibility requirements, technical review and approval, passed inspections, and compliance with program terms and conditions.

Equipment must be installed prior to submitting a SBDI Fast Track project application in order to qualify for an incentive.

## 1.5 PROCESS

### 1.5.1 Determining measure eligibility

1. Before purchasing and installing equipment for your project, the SBDI Service Provider will verify that a SBDI Incentive is available.
  - a. If a measure does not meet SBDI Incentive Program eligibility requirements it may be eligible for a Standard Incentive. Please refer to the Standard Incentive Program measure list at [AmerenMissouri.com/BizSavers](http://AmerenMissouri.com/BizSavers).
  - b. If a measure does not meet Standard or SBDI Incentive Program eligibility requirements it may be eligible for a Custom Incentive. Please refer to the Custom Incentive Program at [AmerenMissouri.com/BizSavers](http://AmerenMissouri.com/BizSavers).

### 1.5.2 SBDI Fast Track Application Process

1. SBDI projects can proceed with equipment purchase and installation prior to submitting final application.
2. After installation, the SBDI Service Provider will submit the application signed by the customer with completion paperwork to the BizSavers Team.
  - a. The customer must receive the project invoice prior to submitting the application.
    - i. The customer must be copied on the email when the invoices are submitted to ensure they have seen the costs being submitted.
  - b. Invoices must be itemized to show the following:
    - i. Installation (labor) price
    - ii. Equipment (material) price
    - iii. Equipment (material) specification or model number
    - iv. Miscellaneous support equipment price
    - v. Disposal fees
    - vi. Incentive amount on final application
3. Once the BizSavers Team receives your completed application they will perform a technical review and submit for final approval prior to your incentive being distributed.

**Note:** *The BizSavers Team may identify additional questions or documentation requirements during technical review.*

**Note:** *Any change in scope from what was in the submitted application will require recalculation of incentive amounts. The incentive may increase or decrease based on measure eligibility and incentive budget availability.*

***Note:** After submittal of the completion paperwork and completed application the project may be subject to an inspection. All SBDI Incentive Program projects are subject to inspection by random sampling or based on incentive amount.*

## 1.6 INCENTIVES

Incentive amounts are subject to change and eligible incentive rates for projects will be based on the following:

- SBDI Incentive Program will only include SBDI Fast Track projects and projects will be eligible for the incentive rates that were available at the time application was received by the BizSavers Team.
- Each SBDI or Standard measure will be capped at 100% of eligible cost to the customer as identified on the submitted invoice.
- Incentive amounts are set per measure and are calculated per measure unit identified on the list. This includes the cost of installation, equipment, disposal fees, and equipment rental.
- SBDI incentive rates will be capped at \$8,000 per Ameren Missouri account number for Program Year 2023. Standard incentive rates will be used for incentive amounts above \$8,000.

Submitted applications must have an aggregate incentive total greater than **\$150.00** across all measures. Total incentives across all programs shall be capped at **\$5,000,000** per customer per this cycle defined as March 1, 2019 through December 31<sup>st</sup>, 2023.