MO.P.S.C. SCHEDULE NO. 5

CANCELLING MO.P.S.C. SCHEDULE NO. 5

5 4th Revised

5th Revised

SHEET NO. 225

SHEET NO. 225

APPLYING TO

MISSOURI SERVICE AREA

#### BUSINESS ENERGY EFFICIENCY

#### PURPOSE

The purpose of the Business Energy Efficiency Program, which consists of four programs, is to proactively impact Commercial & Industrial (C&I) customer energy use in such a way as to reduce consumption of electricity. The programs included in this tariff are cost effective by having a Total Resource Cost Test ratio of greater than 1.0.

#### DEFINITIONS

Unless otherwise defined, capitalized terms used in Tariff Sheet Nos. 225 through 235.9 have the following meanings:

<u>Applicant</u> - A customer who has submitted a program application or has had a program application submitted on their behalf by an agent or Trade Ally.

DSIM (Demand-Side Programs Investment Mechanism) - A mechanism approved by the Commission in a utility's filing for demand-side program approval in File No. EO-2012-0142.

<u>Incentive</u> - Any consideration provided by the Company directly or through the Program Administrator, including in the form of cash, bill credit, payment to third party, donations or giveaways, or public education programs, which encourages the adoption of Measures.

<u>Measure</u> - An end-use measure, energy efficiency measure, and energy management measure as defined in 4 CSR 240-22.020(18), (20), and (21).

<u>Participant</u> - End use customer and/or manufacturer, installer, or retailer providing qualifying products or services to end use customers.

<u>Program Administrator</u> - The entity selected by the Company to provide program design, promotion, administration, implementation, and delivery of services.

<u>Program Period</u> - The period from [TBD based upon timing of MEEIA plan approval] through [three years later] unless sooner terminated under the TERM provision of this tariff. Programs may have slightly earlier deadlines for certain activities, as noted on the Company website www.ActOnEnergy.com.

<u>Project</u> - One or more Measures proposed by an Applicant in a single application.

<u>Total Resource Cost(TRC) Test</u> - A test of the cost-effectiveness of demandside programs that compares the avoided utility costs to the sum of all incremental costs of end-use measures that are implemented due to the program (including both Company and Participant contributions), plus utility costs to administer, deliver and evaluate each demand-side program.

<u>Measure Benefit/Cost(B/C) Test</u> - Each non-prescriptive measure must pass the B/C Test by having a value of 1.0 or greater. B/C Test value equals the present value of the benefits of the Measure over the useful life of the Measure divided by the incremental cost to implement the Measure. The benefits of the Measure include the utility estimated avoided costs.

DATE OF ISSUE

ISSUED BY	Warner L. Baxter	President & CEO	St. Louis, Missouri
	NAME OF OFFICER	TITLE	ADDRESS

MO.P.S.C. SCHEDULE NO. 5

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APPLYING TO

#### MISSOURI SERVICE AREA

### BUSINESS ENERGY EFFICIENCY (Cont'd)

### AVAILABILITY

Except as otherwise provided in the terms governing a particular program, business energy efficiency programs are available uniformly to all customers qualifying for service under Service Classifications Small General Service Rate 2(M), Large General Service Rate 3(M), Small Primary Service Rate 4(M), Large Primary Service Rate 11(M), or Large Transmission Service Rate 12(M).

Business energy efficiency programs are also not available to customers electing to opt-out of energy efficiency program funding under 4 CSR 240-20.094(6), and monetary Incentives that otherwise would be payable under a program are not available to those that have received a state tax credit under sections 135.350 through 135.362, RSMo, or under sections 253.545 through 253.561, RSMo. As provided for in the Commission's rules, customers shall attest to non-receipt of any such tax credit and acknowledge that the penalty for a customer who provides false documentation is a class A misdemeanor.

A customer may elect not to participate (opt-out) in an electric utility's demand side management programs under 4 CSR 240-20.094(6)if they:

- Have at least one account with a demand of 5,000 kW in the previous 12 months with that electric utility, or;
- Operate an interstate pipeline pumping station, or;
- Have multiple accounts with aggregate coincident demand of 2,500 kW in the previous 12 months with that utility and have a comprehensive demand-side or energy efficiency program with achieved savings at least equal to those expected from the utility-provided programs.

A customer electing not to participate (opt-out) must provide written notice to the electric utility no earlier than September 1 and not later than October 30 to be effective for the following calendar year but shall still be allowed to participate in interruptible or curtailable rate schedules of tariffs offered by the electric utility. None of the business energy efficiency programs are considered to be an interruptible or curtailable rate schedule.

Unless otherwise provided for in the tariff sheets governing a particular Program, customers may participate in multiple Programs, but may receive only one Incentive per Measure.

#### TERM

This tariff and the tariffs reflecting each specific business energy efficiency program shall be effective from [TBD] through [three years after commencement date], except that the four programs shall terminate immediately, and without further Commission action, on the effective date of any court order, judgment, or opinion or Commission order that:

- 1. Finds recovery of lost revenue is not authorized by MEEIA or any other Missouri law; or
- 2. Changes or eliminates the approved DSIM or Technical Resource Manual, unless the changes are initiated by the Company.

If the programs are terminated prior to [three years after commencement] under this provision, only Incentives for qualifying Measures that have been installed prior to the programs' termination will be provided to the customer.

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ISSUED BY Warner L. Baxter Pres		President & CEO	St. Louis, Missouri
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# BUSINESS ENERGY EFFICIENCY (Cont'd)

#### DESCRIPTION

The reductions in energy consumption will be accomplished through the following programs:

- Standard Incentive Program
- Custom Incentive Program
- Retro-commissioning Incentive Program
- New Construction Incentive Program

Program details regarding the interaction between the Company or Program Administrators and customers participating in the Programs, such as Incentives paid directly to customers, available Measures, availability of the programs, eligibility, and application and completion requirements may be adjusted through the change process as presented below. Those details, additional details on each program, and other details such as process flows, application instructions, and application forms will be provided on the Company's website www.ActOnEnergy.com, or by calling toll free 1-866-941-7299.

# CHANGE PROCESS

The change process is applicable to changes in a program detail regarding the interaction between the Company or Program Administrators and customers participating in the Programs, and excludes changes to the ranges of Incentive amounts for each Measure.

- 1) Identify need for program detail change regarding the interaction between the Company or Program Administrators and customers participating in the Programs;
- Discuss proposed change with implementer; 2)
- 3) Discuss proposed change with evaluator;
- 4) Analyze impact on program and portfolio (Cost effectiveness, goal achievement, etc.);
- 5) Inform the Staff, Office of the Public Counsel, and the Missouri Department of Natural Resources of the proposed change, the time within which it needs to be implemented, provide them the analysis that was done and consider recommendations from them that are received within the implementation timeline (the implementation timeline shall be no less than five business days from the time that the Staff, Office of the Public counsel, and the Missouri Department of Natural Resources are informed and provided the above-referenced analysis);
- Take timely received recommendations into account and incorporate 6) them where the Company believes it is appropriate to do so;
- 7) Notify and train customer contact personnel (Contact Center, Energy Advisors, Business Center, Key Account Executives, Customer Service Advisors) of the changes;
- Make changes to forms and promotional materials; 8)
- Update program website; 9)
- 10) File updated web pages and, if appropriate, updated list of Measures and Incentive amounts in File No. EO-2012-0142; and
- 11) Inform Customers, Trade Allies, etc.

Company will also continue to discuss and provide information on ongoing program and portfolio progress at quarterly regulatory stakeholder update meetings.

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### BUSINESS ENERGY EFFICIENCY (Cont.)

#### PROPOSED PROGRAM ENERGY SAVINGS TARGETS

Note that targeted energy savings may be shifted between programs depending on market response, changes in technology, or similar factors. These targets are based on savings at customer meters (excluding transmission and distribution line losses).

[	Annual kWh Savings Targets			Total by
	2013	2014	2015	Program
Standard	21,573,968	30,901,412	47,793,508	100,268,887
Custom	48,682,732	50,169,817	68,766,690	167,619,239
Retro Commissioning	2,351,756	2,363,304	2,844,661	7,559,721
New Construction	2,513,756	3,773,143	5,898,434	12,185,332
TOTAL	75,122,212	87,207,676	125,303,293	287,633,180

	Annual kW Demand Savings Estimates Based On kWh Savings Targets			Total by
	2013	2014	2015	Program
Standard	4,540	5,747	8,631	18,918
Custom	13,022	13,656	20,257	46,935
Retro Commissioning	531	523	601	1,655
New Construction	797	1,116	1,867	3,780
TOTAL	18,890	21,042	31,356	71,288

#### PROGRAM COSTS

Costs of the Business Energy Efficiency Program reflected herein shall be reflected in a charge titled "Energy Efficiency Investment Chg" appearing as a separate line item on customers' bills and applied to customers' bills as a per kilowatt-hour charge as specified in the Small General Service Rate 2(M), Large General Service Rate 3(M), Small Primary Service Rate 4(M), Large Primary Service Rate 11(M), and Large Transmission Service Rate 12(M) rate schedules. All customers taking service under said rate schedules shall pay the charge regardless of whether a particular customer utilizes a demand-side program available hereunder, unless they have optedout as provided for previously.

#### PROGRAM DESCRIPTIONS

The following pages contain other descriptions and terms for the programs being offered under this tariff.

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ISSUED BY	Warner L. Baxter	President & CEO	St. Louis, Missouri
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#### **ELECTRIC SERVICE** UNION ELECTRIC COMPANY

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#### BUSINESS ENERGY EFFICIENCY (Cont.)

### CHANGES IN MEASURES OR INCENTIVES

Ameren Missouri may offer the Measures contained in Ameren Missouri's Technical Resource Manual ("TRM") approved in Case No. EO-2012-0142. The offering of Measures not contained within Ameren Missouri's TRM must be approved by the Commission pursuant to 4 CSR 240-20.094(4). Not all Measures listed in the TRM will be offered at all times. The actual Measures being offered, and Incentives available to customers, will be listed on Ameren Missouri's website, www.ActOnEnergy.com. The Measures and Incentives being offered are subject to change - customers must consult www.ActOnEnergy.com for the list of currently available Measures. The website will expressly state in conspicuous language that the Measures and Incentives are subject to change. Should a Measure or Incentive offering shown on Ameren Missouri's website differ from the corresponding Measure or Incentive offering shown in the currently effective notice filed in Case No. EO-2012-0142, the stated Measure or Incentive offering as shown in the currently effective notice shall govern.

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# BUSINESS ENERGY EFFICIENCY Standard Incentive Program

### PURPOSE

The Standard Incentive Program will provide pre-set Incentives for energyefficient products that are readily available in the marketplace. Standard Incentives will be fixed per each Measure. The primary objective of the Standard Incentive Program is to provide an expedited, simple solution for customers interested in purchasing efficient technologies that will produce verifiable energy savings.

### AVAILABILITY

This Program is available during the Program Period, and is voluntary and available to all customers in the classes identified in the Business Energy Efficiency Availability section that also meet the Standard Incentive Program Provisions, below.

### PROGRAM PROVISIONS

The Company will hire a Program Administrator to implement this program. The Program Administrator will provide the necessary services to effectively implement the program and to strive to attain the energy savings targets. Standard Incentives for Measures will be provided to qualifying customers that provide completed Standard Incentive Applications as indicated below:

- Customer must complete a Standard Incentive Application form, available at www.ActOnEnergy.com;
- Customer must provide proof of equipment purchase and installation;
- Measures must be purchased and installed after the effective date of this tariff;
- Measures which receive an Incentive under the Custom Incentive Program are not eligible for this Standard Incentive Program;
- Measures must be part of a Project having an installed TRC ratio greater than 1.0; and
- Standard Measures must be installed as a retrofit in an existing facility;

By applying for the Standard Incentive Program, the customer agrees that the Project may be subject to random on-site inspections by the Program Administrator.

#### ELIGIBLE MEASURES AND INCENTIVES

Standard Incentives filed in File No. EO-2012-0142 and additional Measures covered by the TRM approved in File No. EO-2012-0142 are eligible for program benefits and Incentives and may be offered during the Program Period. These include, but are not limited to, the following equipment types:

- HVAC (Heating, Ventilation, and Air-conditioning)
- Lighting
- Refrigeration
- Cooking
- Water Heating

Eligible Incentives directly paid to customers and Measures can be found at www.ActOnEnergy.com.

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# BUSINESS ENERGY EFFICIENCY Custom Incentive Program

#### PURPOSE

The Custom Incentive Program will provide financial assistance to customers to support implementation of energy efficiency improvement opportunities which are available at the time of new equipment purchases, facility modernization, and industrial process improvement. A "Custom Incentive" is a direct payment or bill credit to a Participant for installation of Measures that are part of Projects that have been pre-approved by the Program Administrator.

### AVAILABILITY

This Program is available during the Program Period, and is voluntary and available to all customers in the classes identified in the Business Energy Efficiency Availability section that also meet Custom Incentive Program Provisions below.

# PROGRAM PROVISIONS

The Company will hire a Program Administrator to implement this program. The Program Administrator will provide the necessary services to effectively implement the program and to strive to attain the energy savings targets. Customers may apply for a Custom Incentive for Measures under consideration which:

- Reduce energy consumption compared to the currently installed system or, in the case of a new system, the standard efficiency system currently available;
- Have not yet been installed and for which purchase and/or installation commitments have not yet been made;
- Have not received an Incentive under the Standard Incentive Program;
- Are not one of the Measures eligible for an Incentive under the Standard Incentive Program; and
- Are being installed in an existing facility.

Prior to purchasing and installing Measure(s), Applicant must submit a Custom Incentive Application form that provides data about the applicable facility and potential Measure(s). The Company or Program Administrator will perform a desk review of the Custom Incentive Application to determine eligibility, Measure Benefit Cost Test results, estimated energy savings and Custom Incentive amount for each Measure. The Program Administrator may perform a site visit to verify baseline conditions. If approved, the Program Administrator will reserve the Custom Incentive amount and notify the Participant of the Measure(s) approval.

Following installation of approved Custom Measures, the Participant will submit a Completion Certificate to the Program Administrator. The Completion Certificate will require documentation of final Custom Measure costs, a completion date for each Custom Measure, and invoices for all Custom Measures. If necessary, the Custom Incentive amount will be recalculated. Every Custom Incentive Application for a Custom Incentive requires pre- approval by the Program Administrator and may be subject to on-site verification by the Program Administrator prior to payment of the Custom Incentive amount.

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	NAME OF OFFICER	TITLE	ADDRESS

## UNION ELECTRIC COMPANY

ELECTRIC SERVICE

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3rd Revised

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APPLYING TO

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### BUSINESS ENERGY EFFICIENCY Retro-Commissioning Program

### PURPOSE

The Retro-Commissioning Program will capture energy and demand reductions from existing facilities by optimizing building system energy use and overall efficiency. Through this Program, the Company will provide energy assessment services and assistance in implementing identified solutions to customers to insure that their systems are operating at optimal energy efficiency.

### AVAILABILITY

This Program is available during the Program Period, and is voluntary and available to all customers in the classes identified in the Business Energy Efficiency Availability section and that also meet the Retro-Commissioning Program Provisions below. Customer facilities eligible for investigation under this program will include those with:

- Higher than average electric energy intensities(kWh/ft<sup>2</sup>);
- Minimum of 100,000 ft<sup>2</sup> of conditioned space;
- Presence of an energy management system (EMS) with direct digital controls (DDC);
- Mechanical equipment in relatively good condition; and
- Will yield cost-effective energy savings according to a Retro-Commission Assessment Study

A "Retro-Commissioning Assessment Study" is a detailed analysis performed by Retro-Commissioning Providers on Projects passing the initial screening which is used to identify sub-optimal system operational performance and to identify corrections which will yield cost-effective energy savings.

#### PROGRAM PROVISIONS

The Company will hire a Program Administrator to implement this program. The Program Administrator will provide the necessary services to effectively implement the program and to strive to attain the energy savings targets. Program benefits have been designed to provide cost effective Retro-Commissioning services to eligible facilities and include:

- Recruitment and training of Retro-Commissioning providers,
- Benchmarking of candidate facilities using ENERGY STAR® procedures to identify facilities with Retro-Commissioning opportunities,
- Access to a group of pre-qualified Retro-Commissioning Providers that can provide studies performed by trained auditors to identify cost effective building system optimization Measures,
- Assisting building owners with contractor acquisition and management
- during the implementation process,

NAME OF OFFICER

- Building owner staff training on Retro-Commissioning operations,
- Verification of operating results, or
- Ongoing monitoring of Retro-Commissioned building systems to promote persistence of improvements.

The Incentives provided through the Retro-Commissioning Program will be limited to those Measures which are determined to achieve energy efficiency improvements through the calibration, maintenance, and optimization of current systems.

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APPLYING TO

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#### BUSINESS ENERGY EFFICIENCY New Construction Incentive Program

#### PURPOSE

The New Construction Incentive Program will capture energy and demand reductions from new construction projects by interacting with building owners and designers during the design and/or construction process. The Program encourages building owners and designers to evaluate and install systems with higher energy efficiencies than the standard or planned systems through training, design incentives, and installation incentives.

# DEFINITIONS APPLICABLE TO NEW CONSTRUCTION INCENTIVE PROGRAM ONLY

Baseline Building Design - The baseline building design will be established on a case-by-case basis, as the more stringent of either the ASHRAE Code 90.1-2001, the facility's original design, the local energy code, or any legal or contractual construction requirements. Baseline building design will be documented in the Technical Analysis Study(TAS).

Technical Analysis Study (TAS) - An energy savings estimate that clearly describes the energy efficiency/process improvement opportunity, with concise and well-documented presentations of the analysis method used to estimate energy savings, and the assumptions used to generate Project capital cost estimates. Each TAS will:

- Describe the proposed facility (typically with a sketch or blueprint showing site layout or floor plan).
- Describe the Baseline Building Design and provide its estimated electricity use and estimated annual Operations & Maintenance costs.
- Describe the efficient equipment to be added along with key performance specifications.
- Provide estimated electricity use for the efficient condition.
- Provide the energy and demand savings calculations, together with the source of input parameter numbers and justification for each assumption made.
- Provide the incremental cost to implement the Project.
- Provide the estimated financial Incentive and estimated annual cost savings, together with the financial metric(s) requested by the customer (i.e., simple payback, Internal Rate of Return, Return on Investment).

Whole Building Area Method - An energy analysis methodology in which the design team examines the integration of all building components and systems and determines how they best work together to save energy and reduce environmental impact.

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# UNION ELECTRIC COMPANY

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BUSINESS ENERGY EFFICIENCY

New Construction Incentive Program (cont.)

### AVAILABILITY

This Program is available during the Program Period, and is voluntary and available to all customers in the classes identified in the Business Energy Efficiency Availability section that also meet the New Construction Program Provisions. Eligible facilities applications include new facilities built from the ground up, additions to existing facilities, or major renovation of existing facilities requiring significant mechanical and/or electrical equipment alteration.

### PROGRAM PROVISIONS

The Company will hire a Program Administrator to implement this program. The Program Administrator will provide the necessary services to effectively implement the program and to strive to attain the energy savings targets. Program benefits are tailored to Projects based on their phase in the development process.

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