



## VILLAGE OF ORLAND PARK | DEVELOPMENT SERVICES DEPARTMENT

### ORLAND PARK SMART ENERGY FUND AMERICAN RECOVERY AND REINVESTMENT ACT 2009

#### Introduction

The Smart Energy Fund (SEF) is a voluntary sub-grant program funded by the US Department of Energy's Energy Efficiency and Conservation Block Grant (EECBG) through the American Recovery and Reinvestment Act of 2009 (ARRA). SEF is designed to assist local Orland Park businesses obtain financial assistance to plan for and implement energy efficiency and conservation projects and initiatives.

SEF is open to all commercial property owners and/or tenants located in Orland Park. However, priority funding will be given to commercial properties in the La Grange Road Corridor, which draws the most energy in the Village. This includes all VC, COR and BIZ zoning district commercial properties that have access to La Grange Road, Ravinia Avenue, John Humphrey Drive and 94<sup>th</sup> Avenue (including Orland Square Mall Ring Road).

Commercial property owners and/or tenants must install at least \$1,000 worth of energy efficiency and conservation improvements in order to qualify for this grant program. Eligible improvements will be funded up to 50% the cost of work, or \$20,000 whichever is less. The Village of Orland Park Development Services Department reserves the right to waive this and any other program parameter in the interest of meeting ARRA goals and objectives.

#### SEF Funding

SEF funding is limited to the \$250,000 allocated by EECBG. The program is first come first serve. If more applications are received than funding levels will allow, the applications will be rejected. ARRA requires EECBG funds to be completely obligated in 18 months from the date of approval. The Village reserves the right to requisition SEF dollars to fully obligate all unused funds for a public purpose.

#### SEF Concept Meeting, Review Process and Smart Ideas for Your Business

A business or property owner seeking SEF assistance must first meet with the Development Services Department to discuss the proposed project. The petitioner must then submit a complete application to the Development Services Department. Following an internal review, the application will appear at the next available meeting of the Development Services and Planning Committee of Trustees. The Committee will review the project and make a recommendation to the Village Board for a final decision.

Building permits are required for all proposed work. Simultaneous application is encouraged. An application to ComEd's [Smart Ideas for Your Business](#) (SIYB) is required and must be submitted prior to receiving SEF assistance.

#### SEF Rules

The following rules apply to the Smart Energy Fund:

- Variances and modifications from the Land Development Code or Village Code are not permitted. Projects will be recommended for denial if a variance or modification is requested.
- Only structurally sound buildings will be considered for this grant program.
- A system energy use analysis is required.
- SEF applications must include a copy of a submitted ComEd SIYB application to qualify for assistance.
- Applicable ARRA reporting and other requirements must be met (e.g. Davis-Bacon wages, copies of all invoices and orders, work schedules, specification sheets etc. must be submitted during the project).
- Buildings targeted for or are undergoing eminent domain proceedings are not eligible under SEF.

SEF improvements are bound by the Smart Energy Fund Agreement (SEFA). All project costs are to be borne by the applicant in full with reimbursement pending from the Village only after work is completed per the approved plan and all conditions are met as verified by the Village's inspection per the signed SEFA. At such time, funds will be dispersed in the form of a check paid out to the applicant upon submittal and verification of the receipts for the specified work. The Village reserves the right to disburse ARRA funds in accordance with ARRA regulations to meet program objectives in a timely manner. Projects will have a limited time (up to 12 months) following the obligation of funds and notice to proceed to complete the project. Failure to complete the project by February 2012 may result in losing financial assistance.

### Energy Use Analysis Write-Up

SEF applications for proposed energy efficiency projects must include an energy use analysis of the system(s) proposed for energy efficiency upgrade(s) in a summary or write-up. The energy use analysis will have two parts. The first part will include a history or summary of energy use for the property as demonstrated by the last 12 months of energy bills, existing system inefficiencies and existing system specifications. The second part will include proposed improvements, what the improved rate of energy efficiency of the system is, the energy efficient system specifications, and the proposed energy saved in kilowatt hours per year.

### ComEd's Smart Ideas for Your Business

SEF applications must include a copy of a completed and submitted [Smart Idea for Your Business](#) application prior to receiving funding for an energy efficiency project. SEF funding is not dependant on whether or not ComEd approves the project. Neither is it dependant on if ComEd incentives are awarded concurrently or if the project is placed on a waiting list to receive assistance when SIYB funding is available. It is the objective of the Smart Energy Fund to leverage as much non-EECBG or ARRA related energy efficiency capital as is possible now and in the future. ComEd SIYB funding may provide up to a 30% incentive in addition to the 50% incentive provided through SEF.

### Retro-Commissioning

The Smart Energy Fund will prioritize and provide \$10,000 to \$20,000 for property owners that participate in ComEd's [Retro-Commissioning](#) program for the implementation of identified retro-commissioning measures with an estimated simple payback of 18 months or less based on electrical savings. ComEd's Retro-Commissioning program rules and guidelines apply.

### Tax Incentives and Other Grants

A number of tax incentives and grants are also available as funding opportunities for energy efficiency projects. The Village encourages all applicants to apply for applicable tax incentives from the State of Illinois and the Federal Government as well as other foundation grants. The following is a list of potential tax incentives and other grants. For more tax incentives visit <http://www.dsireusa.org/>.

Tax Incentives	Grants
Energy Efficient Commercial Buildings Tax Deduction	<a href="#">Consortium of Energy Efficiency</a> (CEE)
Modified Accelerated Cost-Recovery System (MACRS) + Bonus Depreciation Program	<a href="#">Illinois Clean Energy Community Foundation</a>
Business Energy Investment Tax Credit (ITC)	<a href="#">Illinois Solar Energy Association</a> Renewable Energy Credit Aggregation Program
Renewable Energy Production Tax Credit (PTC)	<a href="#">Solar Energy Incentive Program</a>
ENERGY STAR Corporate Tax Credits and Deductions	<a href="#">Solar and Wind Energy Rebate Program</a>
Advanced Energy Investment Credit	

## Eligible Projects and Assistance

All SEF assisted improvements must be directly related to a building's energy system and immediately operational and functional upon implementation. Eligible equipment and infrastructure must be permanent building features and cannot be removed or moved to another location/ building without authorization from the Village of Orland Park Development Services Department.

Eligible SEF improvements are based on the [linked ComEd incentive tables](#). Please review the specifications for lighting, HVAC, refrigeration and motors incentives provided by ComEd for qualifying projects and efficiencies.

<b>Eligible Improvements Table</b> (based on ComEd list of improvements)		
<b>Lighting Incentives*</b>	<b>HVAC Incentives**</b>	<b>Refrigeration Incentives</b>
<ul style="list-style-type: none"> <li>• Hardwired Compact Fluorescent Fixtures;</li> <li>• High Performance or Reduced Wattage 4-foot T8;</li> <li>• Reduced Wattage 8-foot T8;</li> <li>• Specialty T8 Lamps and Ballasts;</li> <li>• LED Lighting;</li> <li>• Metal Halide;</li> <li>• Induction Lighting;</li> <li>• Cold Cathode;</li> <li>• Lighting Controls (e.g. occupancy sensors, plug load occupancy sensors, bi-level stairwell/ hall/ garage fixtures with integrated sensors);</li> </ul>	<ul style="list-style-type: none"> <li>• Unitary and Split Air Conditioning Systems and Air Source Heat Pumps;</li> <li>• Water-Cooled Chillers;</li> <li>• Air-Cooled Chillers;</li> <li>• Room Air Conditioners, provided they are wall mounted as permanent features to a building;</li> <li>• Package Terminal AC and Heat Pump Units (PTAC/ PTHP);</li> <li>• Variable Speed Drive on HVAC Motors;</li> <li>• Demand Control Ventilation for Kitchen Exhaust Hoods;</li> </ul>	<ul style="list-style-type: none"> <li>• Strip Curtains on Walk-Ins;</li> <li>• Anti-Sweat Heater Control;</li> <li>• EC Motor for Walk-In;</li> <li>• EC Motor for Reach-In Refrigerated Cases;</li> <li>• Refrigeration Economizer;</li> <li>• Evaporator Fan Control;</li> <li>• Automatic Door Closers for Walk-In Freezers;</li> <li>• Beverage Machine Control;</li> <li>• Snack Machine Control;</li> <li>• ENERGY STAR Refrigerated Vending Machine;</li> <li>• LED Refrigerated Case Lighting;</li> <li>• High Efficiency Ice Makers;</li> </ul>

\* Priority will be given to projects that focus lighting upgrades toward the façade of the building, including lighting upgrades for signs (e.g. LED storefront signs, "Open" signs, "Exit" signs, channel signs etc.) architectural lighting, window-display lighting, security lighting (including sensors), exterior bollard or path lighting, landscape lighting etc.

\*\* Priority will be given to projects that screen rooftop mechanical equipment from the view of the public right-of-way.

<b>Eligible Improvements Table cont.</b> (based on ComEd list of improvements)		
<b>Motors &amp; Customized Incentives</b>	<b>Renewable Energy Incentives***</b>	<b>Other</b>
<ul style="list-style-type: none"> <li>• NEMA Premium Efficiency Motors (1-200 Horse Power; 1200 RPM, 1800 RPM, 3600 RPM)</li> <li>• Air compressors;</li> <li>• Air compressed and electric motor lifts;</li> <li>• Fluid pumps;</li> <li>• Door operating motors;</li> <li>• Car washes;</li> <li>Other;</li> </ul>	<ul style="list-style-type: none"> <li>• Geothermal Energy System(s);</li> <li>• Solar Energy System(s);</li> <li>• Wind Energy Conversion System(s);</li> </ul>	<ul style="list-style-type: none"> <li>• Energy Audits+;</li> <li>• Energy Audit Recommendation Implementation;</li> <li>• Day-lighting;</li> <li>• Weatherization;</li> <li>• Other;</li> </ul>

\*\*\* It is recommended that energy efficiency and conservation measures are implemented on a building first before installing RE improvements. RE improvements are not eligible for ComEd incentives. RE projects must be combined with a ComEd supported energy efficiency improvement project.

+ Eligible energy audits must be performed by auditors certified with the Building Performance Institute (BPI).

## Ineligible Projects

SEF assistance cannot be applied to the following projects:

- Building improvements unrelated to energy efficiency and conservation;
- Increasing non-conforming improvements;
- Interior re-modeling or other work not specified in a Retro-Commissioning recommendation;
- Improvements completed prior to notification of approval of the grant application;

- Painting;

### **SEF Requirements**

ComEd Trade Ally Requirement. Contractors, engineers, energy service companies (ESCOs) or architects etc. hired to do work on SEF assisted projects are encouraged to be or become ComEd Trade Allies through the [ComEd Smart Ideas Trade Allies](#) program.

ComEd Smart Returns Load Response Program / Voluntary Load Response Program (VLR7). Property owners and business owners must enroll in the ComEd Smart Returns Load Response Program and/ or the VLR7 program to qualify for SEF assistance. [Information on the program is linked to this application](#).

### **SEF Submittals Checklist:**

The following checklist is in addition to the SEF checklist, outlined later in this document.

- Contractor's Sworn Statement and Waiver of Lien (if using Village funds);
- Scope of Work (based on ComEd incentive tables and proposed work);
- Completed copy of the Smart Ideas for Your Business Program Application;
- Smart Returns Load Response Program/ VLR7 Enrollment Verification;

### **Notes:**

VILLAGE OF ORLAND PARK, DEVELOPMENT SERVICES DEPARTMENT

**SMART ENERGY FUND APPLICATION\***

\* A petition will be considered incomplete if any information in this application and the checklist on the next page is missing.

<b>PROPERTY INFORMATION</b>		
ADDRESS		SIZE OF PARCEL <span style="float:right">sf          acres</span>
EXISTING USE ON SITE		PROPOSED USE
CURRENT TENANT		PROPOSED TENANT
HAS THE PROJECT OBTAINED THE NECESSARY APPROVAL FROM THE VILLAGE?    Y / N		
<b>APPLICANT INFORMATION</b>		
NAME		TITLE
ADDRESS		CITY/STATE/ZIP
PHONE	FAX	EMAIL
RELATIONSHIP TO OWNER		
<b>OWNER INFORMATION (IF DIFFERENT FROM APPLICANT INFORMATION)</b>		
NAME		TITLE
ADDRESS		CITY/STATE/ZIP
PHONE	FAX	EMAIL
RELATIONSHIP TO APPLICANT		
<b>IMPROVEMENT INFORMATION</b>		
NAME OF CONTRACTOR(S)/AGENT(S)		PHONE
ANTICIPATED WORK START DATE:		ESTIMATED TOTAL TIME TO COMPLETE PROJECT:
ESTIMATED COST OF IMPROVEMENTS:		REQUESTED AMOUNT OF GRANT:
PROPOSED IMPROVEMENTS (ATTACH ADDITIONAL SHEETS AS NEEDED)		

I certify that the information provided above is true and I agree to pay the required \$50.00 application fee.

Signature of Applicant \_\_\_\_\_ Date \_\_\_\_\_

Notary Signature \_\_\_\_\_ Date \_\_\_\_\_

Notary Seal

For Village Use Only	PROJECT NO.	ASSIGNED TO
	DATE PETITION COMPLETED	Planning Division Director Approval to Proceed

All information and exhibits submitted with this application are true and correct to the best of my knowledge.

I understand that the Village has the right and discretion to approve or deny any project or portions thereof. If this grant is awarded to me, I agree to comply with the guidelines and procedures of the Village of Orland Park Smart Energy Fund.

The owner invites Village representatives to make all reasonable inspections, investigations and take pictures of the subject property during the processing period of this request. The owner and applicant agree to hold harmless the Village of Orland Park and its representatives of any damage to the building or personal injury that occur as a result of work funded by this grant.

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SIGNATURE OF APPLICANT

DATE

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SIGNATURE OF OWNER

DATE

**CHECKLIST OF SMART ENERGY FUND APPLICATION ITEMS (all items below must be provided):**

- One (1) original completed Smart Energy Fund application form.
- Proof of property ownership.
  - If the property is owned by the applicant, submit a copy of the latest recorded deed.
  - If the property is rented or leased by the applicant, submit a letter from the owner authorizing the applicant to apply for a grant under the Smart Energy Fund and undertake the approved improvements.
  - If the property is owned by a trust, submit a certified copy of the trust agreement, a list of beneficiaries, and a letter of authorization from the trust officer.
  - If the applicant is a contract purchaser, submit a copy of the contract and a letter of authorization from the owner (seller).
- Receipted copy of the most recent tax bill for the property or evidence of at least a two-year lease.
- Copy of the title insurance policy.
- Energy bills for the last 12 months.
- Narrative description of the project and scope of work. Include equipment specifications and proposed energy savings calculations. *Include a description of the building's current status and the area(s) to be improved/ repaired/restored, proposed work to be performed.*
- Drawings of the proposed work to scale (4 copies), if applicable. *Drawings must be legible. Projects impacting the exterior appearance of the building(s) will be required to provide architectural renderings in order to provide a good understanding of the proposed finished product. Additional copies may be required prior to Village Board meetings.*
- Contractor estimates from two (2) different sources. *Estimates must include only the work proposed for the energy efficiency/ conservation/ renewable energy project. Eligible work is listed in the program description. The estimate must include a brief description and methodology of the work to be done. Include drawings if necessary. Submitting a list of items is not acceptable.*
- System Specification sheets, if requested by staff at the pre-application meeting.

**CONTRACTOR'S SWORN STATEMENT AND WAIVER OF LIEN TO DATE**

Project Name and Address:

\_\_\_\_\_

Owner/Lessee's Name:

\_\_\_\_\_

Contractor Name and Position:

\_\_\_\_\_

Company Name:

\_\_\_\_\_

Company Address:

\_\_\_\_\_

Contractors, Subcontractors and Professional Service Providers used (attach receipt or paid invoice for the full cost of work performed by each):

Name	Address	Work Completed	Amount Billed	Amount Paid

I, \_\_\_\_\_, swear that the above (and attached) contractors, subcontractors and professional service providers are the only ones who performed work under the Smart Energy Fund Agreement with the Village of Orland Park for the property identified above, and billed and were paid the amounts shown. I further swear that the above (and attached) contractors, subcontractors and professional service providers met or meet the criteria and requirements of the [Davis-Bacon Act](#).

Date: \_\_\_\_\_ Signature: \_\_\_\_\_

Subscribed and Sworn before me this \_\_\_\_ day of \_\_\_\_\_, 200\_\_ .

Notary Public: \_\_\_\_\_ Notary Stamp:

**FINAL PAYOUT REQUEST – SMART ENERGY FUND**  
*(The following section to be completed by the Village of Orland Park)*

Village Approval for Payout by (Planner): \_\_\_\_\_ Date: \_\_\_\_\_  
*Attach final inspection report(s)*

Amount Paid to Contractors, Subcontractors and Professional Service Providers:  
\_\_\_\_\_

Total amount of Contract: \_\_\_\_\_

Explanation of Balance: \_\_\_\_\_

Total Amount in the Smart Energy Fund Agreement: \_\_\_\_\_

Amount due from the Village: \_\_\_\_\_