

SECO LoanSTAR Revolving Loan Fund Application

Attachment A

1. General Information

Part 1A: Applicant (Borrower)

Name of Eligible Public Entity		Federal Tax ID	Application Date	
Mailing Address		City	State	Zip Code
County Name	Total Amount Requested			
	\$			

Part 1B: Chief Executive Officer (Signing Authority)

First Name	Initial	Last Name	Title
Telephone	Extension	Fax	Email Address

Part 1C : Applicant Primary Contact (Project Director)

First Name	Initial	Last Name	Title
Telephone	Extension	Fax	Email Address

Part 1D : Applicant Secondary Contact (Energy Manager)

First Name	Initial	Last Name	Title
Telephone	Extension	Fax	Email Address

Part 1E: Administrative Contact for Accounting (Financial Contact)

First Name	Initial	Last Name	Title	
Mailing Address		City	State	Zip Code
Telephone	Extension	Fax	Email Address	

Part 1F: Signature and Certification by Applicant Chief Executive Officer or Chief Financial Officer

I certify that I am the Chief Executive Officer and that I have reviewed this application and that I will agree to abide by the terms of the contract.

Signature	Printed Name and Title	Date
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2. Project Information

PART 2: PROJECT INFORMATION

2A. Place a check on the type of report that is submitted with the application. One (1) original and five (5) bound copies of the report are required. In the blank space below the checklist include the following: a) Report title and date; b) Report author; and c) Location of study (city and county).

- Energy Assessment Report (EAR) for design-bid-build or design-build projects
- Utility Assessment Report (UAR) for Energy Savings Performance Contracts
- Commissioning Report
- Preliminary Energy Assessment (PEA)
 - EAR/UAR to be completed in less than 100 days
 - EAR/UAR to be completed in less than 120 days
 - EAR/UAR to be completed in less than 140 days
- Project Assessment Commitment (Maximum 15 points)
 - EAR/UAR to be completed in less than 100 days
 - EAR/UAR to be completed in less than 120 days
 - EAR/UAR to be completed in less than 140 days

If EAR/UAR cannot be completed in less than 140 days after notice is received that funding is committed from project, do not proceed. The project is disqualified from further loan consideration.

2E. Do you agree to accept the terms and conditions of the sample contract.

- Yes
- No

SECO LoanSTAR Revolving Loan Fund Application

PART 3: PROJECT FINANCIAL INFORMATION

3A. Complete the following table for Design-Bid-Build or Design-Build Projects.

If any information changes in the table prior to loan document preparation, an updated table is required in order to complete the loan application.

1. FACILITY INFORMATION

FACILITY NAME _____ ADDRESS _____ CITY, STATE _____ ZIP CODE _____

2. ENGINEERING FIRM INFORMATION

FIRM NAME		ADDRESS	CITY, STATE	ZIP CODE	DATE OF AUDIT REPORT				
ECRM NO.	BUILDING	ECRM DESCRIPTION	CONSTRUCTION TIME	COSTS			EST. ANN. SAVINGS	PAYBACK (yrs)	ECRM EUL (yrs)
				Eng./Design	Construction	Total			
10. TOTALS			\$	\$	\$	\$			
					11. EAR Cost*	\$	\$		
					12. Metering**				
					13. Monitoring**				
					14. Total Loan				

_____ *Costs for the EAR, metering, and monitoring may be included in the loan at Borrower's option.
 **Maximum metering cost is 3% of ECRM costs and monitoring cost is 7%. Contact SECO for additional information.
 *** Individual energy efficiency measure payback must be less than or equal estimated useful life of the measure.

How long will it take to complete the energy efficiency field activities on the project? _____

Is the composite simple payback for the ECRMs or UCRMs is less than 10 years?

Yes No

Is the simple payback for each ECRM less than the Estimated Useful Life (EUL) of the ECRM?

Yes No

SECO LoanSTAR Revolving Loan Fund Application

PART 3: PROJECT FINANCIAL INFORMATION

3B. Complete the following table for Energy Savings Performance Projects.

If any information changes in the table prior to loan document preparation, an updated table is required in order to complete the loan application.

UCRM No.	UCRM Title	Annual Savings							Project Cost (\$)	Payback (yrs.)	Estimated Project Useful Life (yrs.)
		Electric Energy (kWh/yr)	Demand (kW/yr)	Electric (\$/yr)	Natural Gas (Mcf/yr)	Natural Gas (\$/yr)	Water (kGal/yr)	Water (\$/yr)			
1											
2											
3											
4											
5											
6											
7											
8											
Utility Assessment Report Cost		--	--	--	--	--	--	--		--	--
Initial Measurement & Verification Cost		--	--	--	--	--	--	--		--	--
Construction Bonding Cost		--	--	--	--	--	--	--		--	--
Owner's Administration, Management, Training & Other Costs		--	--	--	--	--	--	--		--	--
IMPLEMENTATION TOTALS (Simple Payback)											
Required On-going Monitoring Service Cost		--	--	--	--	--	--	--		--	--
Guaranteed Rebate Savings		--	--	--	--	--	--	--	< >	--	--
Financing Cost		--	--	--	--	--	--	--		--	--
TOTAL PROJECT PAYBACK (Project Payback)		--	--	--	--	--	--	--		--	--

* Individual energy efficiency measure payback must be less than or equal estimated useful life of the measure.

How long will it take to complete the energy efficiency field activities on the project? _____

Is the total project payback for the UCRMs is less than 10 years?

Yes No

Is the simple payback for each UCRM less that the Estimated Useful Life (EUL) of the UCRM?

Yes No

SECO LoanSTAR Revolving Loan Fund Application

PART 4: APPLICANT TEAM METRICS

4D. Describe where monthly energy savings information will be made available for public viewing.

PART 5: PROJECT GEOGRAPHIC LOCATION AND POPULATION

5A. Write down the name of the county and the county population where project retrofit activities will take place. Use the following URL to determine the county population, <http://quickfacts.census.gov/qfd/states/480001k.html>

PART 6: SIGNATURE AND CERTIFICATION

6A. Signature and Certification by Applicant Chief Financial Officer

I certify that I am the Chief Financial Officer and that I have reviewed this application, including commitment of “buy-down” funds. The information provided is accurate to the best of my knowledge and in my best professional judgment.

Signature	Printed Name and Title	Date

SECO LoanSTAR Revolving Loan Fund Application

Attachment B – Evaluation Form

Applications will be evaluated under the general criteria outlined below. The Comptroller will make the final decision. The Comptroller reserves the right to accept or reject any or all applications submitted. The Comptroller is not obligated to execute a loan agreement on the basis of this NOLFA / RFA. The Comptroller shall not pay for any costs incurred by any entity in responding to this NOLFA / RFA. Comptroller and SECO may request additional information at any time if deemed necessary for further evaluation. General evaluation criteria are as follows and as set forth in the application instructions:

Description	Possible Base Points	Score assigned (completed by applicant and SECO)
<p>1. Which of the following reports are submitted with this application?</p> <ul style="list-style-type: none"> <input type="checkbox"/> Energy Assessment Report (EAR) for design-bid-build or design-build projects – 45 points <input type="checkbox"/> Utility Assessment Report (UAR) for Energy Savings Performance Contracts – 45 points <input type="checkbox"/> Commissioning Report – 45 points <input type="checkbox"/> Preliminary Energy Assessment (PEA) (Maximum 40 points) <ul style="list-style-type: none"> o EAR/UAR can be completed in less than 100 days after MOU execution – 40 points o EAR/UAR can be completed in less than 120 days after MOU execution – 35 points o EAR/UAR can be completed in less than 140 days after MOU execution – 30 points <input type="checkbox"/> Project Assessment Commitment (Maximum 25 points) <ul style="list-style-type: none"> o EAR/UAR can be completed in less than 100 days after MOU execution – 25 points o EAR/UAR to be completed in less than 120 days – 20 points o EAR/UAR to be completed in less than 140 days – 15 points <hr/> <p>If EAR/UAR cannot be completed in less than 140 days after notice is received that funding is committed from project (Memorandum of Understanding (MOU)), do <u>not</u> proceed. The project is disqualified from further loan consideration.</p> <p>If no report, assessment or commitment is submitted, do <u>not</u> proceed. The project is disqualified from further loan consideration.</p>	45	
<p>2. Has the applicant stated they agree to the terms and conditions of the sample contract?</p> <ul style="list-style-type: none"> <input type="checkbox"/> If yes, place “x” in box, write “OK” in column to the right and continue with evaluation. <input type="checkbox"/> If no, do <u>not</u> proceed. 		

SECO LoanSTAR Revolving Loan Fund Application

Description	Possible Base Points	Score assigned (completed by applicant and SECO)
<p>3. This question relates only to Design Build (DB) and Design Bid Build (DBB) projects. Is the composite simple payback for the project Energy Cost Reduction Measures (ECRMs) less than 10 years?</p> <p><input type="checkbox"/> If yes, place “x” in box, write “OK” in column to the right and continue with evaluation.</p> <p><input type="checkbox"/> If no, do not proceed. Project is disqualified from further loan consideration.</p> <p><input type="checkbox"/> N/A</p>		
<p>4. This question relates only to Energy Savings Performance Contracts ESPCs. Is the Total Project Payback less than 10 years?</p> <p><input type="checkbox"/> If yes, place “x” in box, write “OK” in column to the right and continue with evaluation.</p> <p><input type="checkbox"/> If no, do not proceed. Project is disqualified from further loan consideration</p> <p><input type="checkbox"/> N/A</p>		
<p>5. Is the simple payback for each ECRM / UCRM less than the Estimated Useful Life (EUL) of that measure?</p> <p><input type="checkbox"/> If yes, place “x” in box, write “OK” in column to the right and continue with evaluation.</p> <p><input type="checkbox"/> If no, do not proceed. Project is disqualified from further loan consideration</p>		
<p>6. What is the name of the county and the county population (http://quickfacts.census.gov/qfd/states/480001k.html) where project retrofit activities will take place?</p> <p>County Name: _____ County Population: _____</p> <ul style="list-style-type: none"> • County population less than 10,000 - 3 points • County population between 10,001 to 100,000 – 2 points • County population greater than 100,000 – 0 points 	3	

SECO LoanSTAR Revolving Loan Fund Application

Description	Possible Base Points	Score assigned (completed by applicant and SECO)
7. Will the energy savings information, updated monthly, be available for public viewing? <ul style="list-style-type: none"> • If yes, how will the applicant make this information available for public viewing <ul style="list-style-type: none"> ○ Via an internet portal – 2 points ○ Via detailed signage at the facility entrance - 1 points • If no, than 0 points will be credited for this response. 	2	
Maximum Base Score	50	
Total Score Assigned By Applicant		
Total Score Assigned By SECO		