

APPLICATION INSTRUCTIONS

This application is intended to be self-scoring and one in which qualified city, county, independent school district, state agency or institute of higher education applicants may determine their application score based on the project details and focus. Any incomplete or misleading information may lead to the disqualification of this application.

ATTACHMENT A: APPLICATION

Attachment A of the packet is divided into the following different sections and is primarily used to identify the project partners and contacts. The following are descriptions of each part of Attachment A.

Part 1 (A-F): General Information

Part 1 requests information that identifies the key information of the entity, its primary contacts and the primary project-specific contacts. After the information required in this section has been provided, the application must be signed and dated by either the Chief Executive Officer or the Chief Financial Officer.

Part 2 (A-I): Project Information

Part 2 references the type of documentation and commitments that should be submitted with the application. Part 2A requires additional submittal documentation. Part 2B requires additional submittal documentation if the project is going to be an Energy Savings Performance Contract. Part 2C is a clarification on the protocol used to complete Part 2B. Part 2D requires a commitment to complete an Energy Assessment Report / Utility Assessment Report (EAR/UAR) within a specified period after the project commitment. Submitted reports and associated submitted utility data must be no older than 18 months of the application due date.

Parts 2E, 2F, and 2G are qualifying questions related to the information submitted in the previous parts. The answers provided in these parts are very important because they can lead to the application disqualification if the project does not meet LoanSTAR requirements.

Parts 2H and 2I refer to the number and type of energy efficiency measures undertaken on the project. The number of energy efficiency measures is grouped by the type/category of the measure. It is not determined by the different locations for the same measure. Part 2I is for highlighting renewable energy efficiency measures that will be part of the project.

Part 3 (A-B): Project Financial Information

Part 3 requires detailed project financial information for the project. The information required includes dividing the project into energy efficiency categories (Energy Cost Reduction Measures (ECRMs) / Utility Cost Reduction Measures (UCRMs)) and providing details relating to the type of energy efficiency measure, the location(s) for that measure, the costs to install the measures, the associated utility savings, and the project simple payback. In all cases, the simple payback for each measure should be less than the economic useful life (EUL) of that measure. If the applicant will “buy down” any part of the project with other funds, include which specific ECRMs/UCRMs, the “buy down” will affect.

Part 4 (A-D): Applicant Team Metrics

Part 4 requires the applicant to provide detailed information regarding the companies and individual members of the companies that will participate on the project. In Part 4A, the focus is on the design experience of the Professional Engineers working on the project. Part 4B highlights the similar project experience of other individuals within the companies.

Part 4D refers to the posting of post-construction energy savings information resulting from the energy efficiency measures undertaken on the project. Posting energy savings information in a format and location where affected employees and outside entities can see the energy savings from the retrofit activities is preferable.

Part 5 (A): Project Geographic Location and Population

Part 5 requires county and county population information at the project location. An URL reference is included so that all project submittals will utilize the same information source.

Part 6 (A): Signature and Certification

Part 6 requires signature and certification of the CFO attesting to the accuracy of the submitted information.

ATTACHMENT B: EVALUATION FORM

Attachment B is intended to facilitate the scoring process for submitted applications. This methodology also enables applicants to be aware of application strengths and potential weaknesses before submittal. The Evaluation Form consists of thirteen (13) questions. On the Evaluation Form, points are provided for each potential response of each question. As each question is answered, the applicant will know the number of points they should receive on that question. Once the Evaluation Form has been completed, the self-score will be determined by adding together the points for each question. SECO staff will verify this calculation upon receipt.

Upon Completion of the Application and Evaluation Form, please submit one (1) original and five (5) copy sets of the required documentation, and any additional attachments (letter-sized only) according to the instructions provided in the Request for Applications. All Preliminary Energy Assessments, Energy Assessment Reports, and Utility Assessment Reports must be submitted in separate binders.