

Montgomery County Green Bank Commercial Loan for Energy Efficiency and Renewables Program ("CLEER")

Guidelines for Authorized Contractors

February 8, 2018

Version 1.0

Effective Date: February 8, 2018

Contents

Section 1. Overview.....	2
Section 2. Financing Product Overview.....	2
Section 3. Overview of How It Works	4
Section 4. Contractor Qualifications and Training	6
Authorized Contractors	6
Participating Lender Review of Contractors	7
Section 5. MCGB Eligible Measures	7
Energy Savings.....	7
MCGB Pre-Approval	8
Section 6. Payment and Fees	8
Funds -- Initial Disbursement(s)	8
Funds -- Final Payment	8
MCGB Fees	9
Section 7. CLEER Program Forms.....	10
Section 8. CLEER Program Marketing	10
Section 9. MCGB Quality Assurance Functions	11
Section 10. Contacts and More information	12
MCGB Contact Information.....	12
Participating Lender Contact Information	12

Version No.	Date	Summary of Changes
V.1.0	TBD	N/A—original

Section 1. Overview

The Montgomery County Green Bank Corporation (“MCGB”) partners with lenders and contractors to create affordable financing options for energy efficiency and renewable energy projects for businesses and residents throughout the Pepco service territory of Montgomery County, MD. MCGB’s Commercial Loan for Energy Efficiency and Renewables Program (“CLEER Program”) is available to for-profit and nonprofit commercial property or business owners. Eligible properties on which energy saving improvements may be financed are commercial and industrial properties in the Pepco Service area of Montgomery County, MD (“Eligible Properties”), including those being used for a variety of purposes such as manufacturing, light industrial, warehousing, food service, office, retail, multi-family rental apartments of five or more units, and houses of worship. Eligible Properties also include multifamily communities, such as condominiums, planned unit developments (“PUDs”) and cooperatives. CLEER Program financing is made available through lenders that have entered into an agreement with MCGB to participate in the CLEER Program (“Participating Lenders”). In this way, the MCGB is increasing the availability and affordability of energy efficiency and renewable energy financing.

As part of the CLEER Program, MCGB authorizes a network of contractors to be eligible to access CLEER Program financing for its customers, establishes CLEER Program guidelines, and verifies the completion of installations performed under the CLEER Program. Contractors are eligible for participation under the CLEER Program (“Authorized Contractors”) if they are approved by Pepco as a Service Provider under the Pepco 2018 Commercial and Industrial (“C&I”) Energy Savings Program (“C&I Program”), are in good standing with the C&I Program, have entered into a Contractor Agreement with MCGB, are in good standing under the CLEER Program. Authorized Contractors may offer their customers access to CLEER Program financing.

Authorized Contractors help promote the CLEER Program and perform work for their customers, including the installation of Pepco C&I Eligible Measures and other energy-saving improvements. Examples of such improvements financeable under the CLEER Program include: Pepco C&I Eligible Measures of lighting, ventilation, heating/air conditioning (HVAC), refrigeration, and combined heat and power PLUS solar photovoltaic (PV), HVAC (gas), and energy storage. (A full list of eligible measures is provided in this document and online.) MCGB’s CLEER Program is designed to complement Pepco’s C&I Program and may be a good fit for projects not suitable for Montgomery County’s Commercial Property Assessed Clean Energy (“C-PACE”) financing program (for instance, due to project loan size and building type). The CLEER Program will also supplement federal and state tax credits, and other available incentives for energy efficiency. 100% new construction projects are not eligible for the CLEER Program, but projects associated with renovations and expansions may be eligible (see guidelines below).

Section 2. Financing Product Overview

Below is an overview of the loan product available through Participating Lenders in the CLEER Program. Individual terms vary between Participating Lenders. Please contact each Participating Lender for product offering details utilizing the contact information found in **Section 10**.

Financing type	Loan
Financing amounts	Minimum: \$10,000 Maximum: \$250,000; larger loans may be approved on a case-by-case basis, if submitted for prior approval by lender to MCGB
Term	24 to 144 months, depending upon the Participating Lender
Financing rates	Rates vary by Participating Lender and are based on several factors, including borrower’s credit, size of loan, term, and market conditions.
Eligible Properties	Commercial properties or businesses in commercial buildings (“Commercial Properties”) (includes those owned by for-profit and nonprofit organizations), rental apartment buildings of 5 or more units,

	<p>and multifamily communities, which include condominiums, PUDs and cooperatives.</p> <p>Properties must be located in the Pepco service area of Montgomery County, MD.</p>
Scope Magnitude	<p>All projects must include at least one Pepco-approved Eligible Measure.</p> <p>Retrofits and renovations (including new construction in conjunction with retrofit of existing property) qualify.</p> <p>100% new construction projects are <u>not</u> eligible for participation in the CLEER program.</p>
Eligible Borrowers	<p>Commercial Property owners or tenants, a condominium or PUD association, or cooperative corporation (“Business Owner”)</p> <p>Tenants of Commercial Properties seeking to make Eligible Measures must obtain the <u>prior written consent of the property owner</u>.</p>
Eligible Energy Improvements	<p>Eligible Measures approved by Pepco under its C&I Program, PLUS several other qualifying energy-related improvements including: energy storage, photovoltaic (PV), or HVAC natural gas, must comprise at least 70% of the cost of improvements being financed (a full list of eligible measures is provided in Attachment A to this document and online). All projects must include some portion of a Pepco-approved C&I Program Eligible Measure.</p> <p>Additional improvements to the property that are not included above but are related to the above improvements (such as water conservation, roofing improvements to support solar PV installation, insulation, and painting of the area where the energy improvements were installed) are allowed and may account for up to 30% of the cost of improvements financed.</p>
Security / Recourse	<p>UCC-1 and other filings, including fixture filings, as required by the Participating Lender. Corporate and personal guarantee requirements vary by Participating Lender.</p>
Underwriting Criteria	<p>The borrower may not have a history of bankruptcy, tax liens, or judgments.</p> <p>Please contact Participating Lenders for additional details on specific underwriting criteria.</p>
MCGB Fees	<p>CLEER Program Fee to be included by Authorized Contractor: 2.99% of the total amount financed and paid out of loan proceeds.</p> <p>MCGB Origination Fee to be included by Participating Lender: 0.5% of the total amount financed and paid out of loan proceeds.</p> <p>MCGB Documentation Fee up to \$50 may be included by Participating Lender.</p> <p>Other fees may include lender fees and any direct expenses incurred by lender to secure the transaction, such as UCC-1 filings. See Participating Lender for details.</p>

Section 3. Overview of How It Works

1. **Develop a Scope of Work:** A Business Owner works with an Authorized Contractor (see **Section 4**, “Contractor Qualifications and Training”) to identify eligible improvements (“MCGB Eligible Measures”) and prepares the preliminary scope of work with a cost estimate, projected savings on energy consumption, projected amount of incentive rebates, and MCGB’s *Installed Scope and Energy Savings Report*. MCGB Eligible Measures are listed on the MCGB website. All projects must include some portion of a Pepco-approved C&I Program Eligible Measure. Note that the MCGB Eligible Measures list is more extensive than the Pepco C&I Energy Savings Program Eligible Measures List.

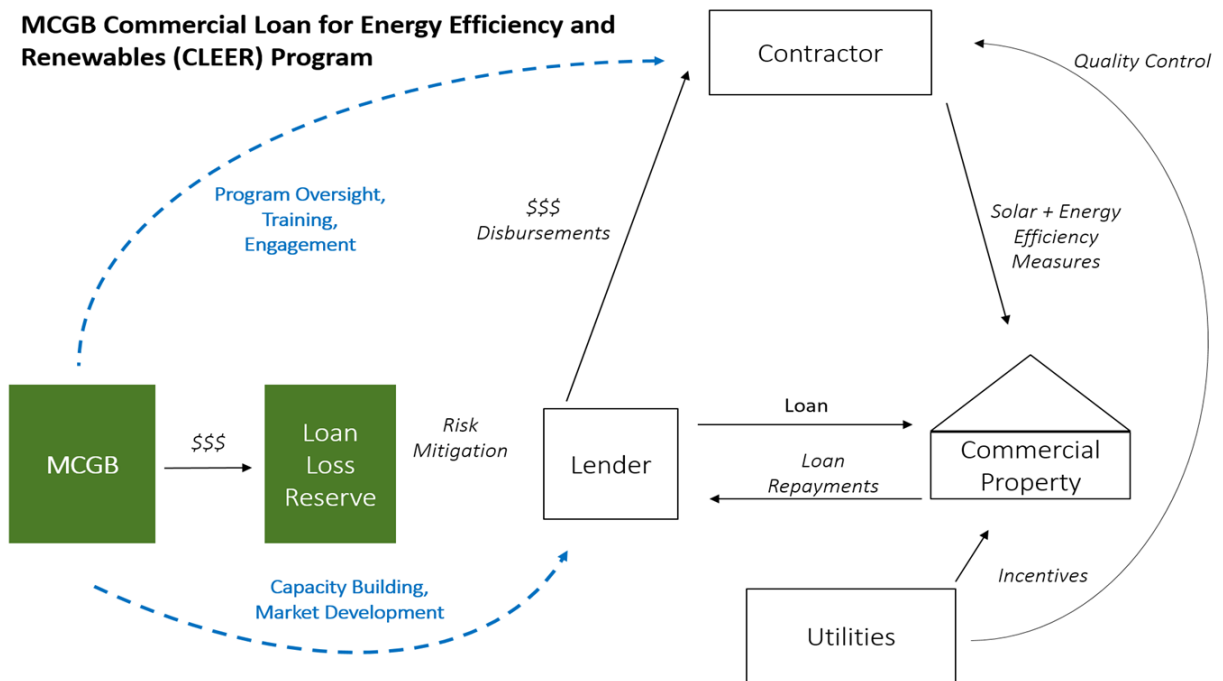
NOTE: The difference between the estimated amount of Pepco Incentive Rebate and the cost of the MCGB Eligible Measures generally will be the amount financed under the CLEER Program. However, as an added benefit, the CLEER Program allows up to 30% of the total financed amount to be applied to non-Eligible Measure building upgrades if necessary to complete or complement the Eligible Measures, such as water conservation, roof repair, etc.

2. **Select a Participating Lender:** The Authorized Contractor works with the Business Owner to select the preferred Participating Lender or directs the Business Owner to contact Participating Lenders and make their selection.
3. **Submit Lender Credit Approval Documentation:** Either the Authorized Contractor or Business Owner, depending on Participating Lender preferences, submits the signed credit application to the Participating Lender.
4. **Lender Credit Approval:** Each Participating Lender will conduct their underwriting and provide a decision on Business Owner’s credit approval.
5. **Submit MCGB Pre-Approval Documents.** The cost estimate and preliminary scope of work and the projected energy savings, which are entered into MCGB’s *Installed Scope and Energy Savings Report*, and Pepco’s approval, must be attached to the CLEER Program application. Depending on Lender requirements, these documents may be submitted simultaneously with Credit Documentation.
6. **MCGB Pre-approval:** Separate from Lender Credit Approval, MCGB will pre-approve for Participating Lender a Business Owner’s application as eligible for CLEER Program financing based on the scope of work meeting MCGB Eligible Measures as described in **Section 5**. At this stage, MCGB also will verify that the Authorized Contractor continues to be a Pepco Service Provider in good standing with Pepco’s C&I Program.
7. **Completing Financing Paperwork:** The Participating Lender prepares the loan documentation. Details on the project, including vendor sales quotes, are needed at this time. The loan documentation package is sent to the Business Owner (or Authorized Contractor) for signature by Business Owner and returned to the Participating Lender per its instructions, along with a fully-completed and signed MCGB *Customer Consent to Information Sharing and Disclosure* (“Consent”) form. The Business Owner must sign and return the applicable loan documentation and Consent form with any applicable fees not being financed out of loan proceeds to the Participating Lender.
8. **Receive Funding and Begin Construction:** Upon receipt of the complete and executed loan documentation, *Customer Consent to Information Sharing and Disclosure* form and applicable fees,

meeting Lenders funding requirements (e.g., provision of permits if applicable), and if the Authorized Contractor is approved for prefunding (See **Section 6**), the Participating Lender will make its disbursement, provided that no more than fifty percent (50%) of the loan proceeds are to be provided before the final disbursement. (Note: Upon MCGB’s prior written approval to the Participating Lender for loans of \$100,000 or more, MCGB may permit, based on request by Participating Lender, up to 75% of loan proceeds to be disbursed by the Participating Lender if such loan utilizes a draw schedule and the initial funding does not exceed fifty percent (50%) of loan proceeds.)

9. **Submit Project Completion Paperwork:** When the work is finished, the Business Owner and Authorized Contractor sign the MCGB *Certificate of Completion* and the *Installed Scope and Energy Savings Report* (see **Section 7** below for submittal instructions) and return it to MCGB.
10. **Receive Remaining Funds:** Once project completion has been documented and MCGB has accepted the MCGB *Certificate of Completion* and the *Installed Scope and Energy Savings Report*, the MCGB will notify the Participating Lender and the Participating Lender follow its process to disburse the remaining balance of funds.
11. **MCGB Quality Assurance:** As a post-completion effort (and not associated with any disbursement of funds), MCGB will undertake a quality assurance process to review the quality of work undertaken with CLEER Program financing, as well as to ensure compliance with Program requirements. MCGB may suspend or remove contractors from the Authorized Contractor list based on this review. (See **Section 9** below).

The diagram below summarizes the overall process:



Section 4. Contractor Qualifications and Training

Authorized Contractors

Only Authorized Contractors (as further described herein) may be engaged by a CLEER Program borrower. The list of Authorized Contractors is posted on MCGB's website.

Initially, Authorized Contractors are limited to those:

- Listed as a Service Provider for Pepco's C&I Program and which are in good standing with Pepco's C&I Program,
- Entered into a Contractor Agreement with MCGB and returned the required supporting documentation (see below), and
- Had a company senior manager attend a CLEER Program training.

To become an Authorized Contractor for CLEER Program, a contractor should complete the following steps:

1. Contact MCGB to express interest in becoming a MCGB CLEER Program Authorized Contractor.
2. Execute the MCGB Contractor Agreement that incorporates these Contractor Guidelines. As part of the Contractor Agreement, Contractor provides MCGB with:
 - a. a copy of its applicable state business license(s), including expiration dates, and
 - b. evidence that its business insurance is in place and are current, as well as the expiration date of its insurance policy(ies).
3. Submit contractor's approval as a Service Provider under Pepco's C&I Program and maintain good standing with Pepco.
4. Contractor's Chief Financial Officer, Chief Operating Officer or other senior manager attends a one-hour online training session on the financing process, Participating Lender requirements and loan terms, and CLEER Program requirements.
5. Meet any approval requirements of Participating Lenders.

MCGB will transmit information to Participating Lenders after the contractor's application has been reviewed and approved by MCGB, MCGB will update its list of Authorized Contractors on its website.¹

CLEER Program forms and training dates are available on the "Contractors" page at <https://mcgreenbank.org/>.

MCGB reserves the right to review an Authorized Contractor's continued program qualification, including the currency of insurance and licenses, contractor performance, approval by Participating Lenders, and whether it is considered by Pepco to be "in good standing." MCGB reserves the right to exclude any Authorized Contractor from the Program based on its review or Participating Lender or borrower feedback. (See **Section 9**) Should MCGB remove an Authorized Contractor from the Authorized Contractor list, MCGB will notify the Authorized Contractor and Participating Lenders.

¹ In the future, MCGB may develop its own method for authorizing contractors for the Program in addition to those affiliated with Pepco's C&I Program. If MCGB develops such an approach for contractors, it will be communicated to Participating Lenders prior to introduction. As part of any application process managed by MCGB, MCGB may collect additional contractor information as may be reasonably required.

Participating Lender Review of Contractors

As part of the process, an Authorized Contractor also may be screened by the Participating Lenders. Each Participating Lender is responsible for its own evaluation of the Authorized Contractors. It is possible for a contractor to be authorized by MCGB but be denied by one or more Participating Lenders for issues with business and financial stability. If all Participating Lenders deny an Authorized Contractor, then the contractor's participation in the CLEER Program will be suspended until at least one Participating Lender allows for the Authorized Contractor's participation. If an Authorized Contractor is unable to qualify through any Participating Lenders, then the contractor will not be eligible to participate in the CLEER Program and the contractor will be removed from the list of Authorized Contractors. A Participating Lender will notify MCGB of an Authorized Contractor it deems unable to qualify for the CLEER Program.

Section 5. MCGB Eligible Measures

Only MCGB Eligible Measures (as described herein) on Eligible Properties owned or occupied by nonprofit or for-profit businesses and located in the Pepco service territory of Montgomery County, MD will qualify for the CLEER Program. Tenants of Eligible Properties seeking to make Eligible Measures to a property may be required by the Participating Lender to obtain the prior written consent of the property owner and meet any requirements that the Participating Lender may require in these cases.

MCGB has a pre-qualified list of MCGB Eligible Measures that includes Pepco C&I Program Eligible Measures, including Co-Generation, PLUS other energy conservation, energy generation or energy management measures including: energy storage, renewable energy installations of solar PV, and HVAC natural gas. The most current list of MCGB Eligible Measures is posted on <https://mcgreenbank.org/>. Business owners seeking to have all or a portion of their energy improvements financed under the CLEER Program may choose from any measure or combination of measures on this list. However, all scopes must include at least one Pepco C&I Program Eligible Measure that has been approved by Pepco.

In addition, up to 30 percent (30%) of the total financed amount may be for non-Eligible Measure building upgrades necessary to complete or complement the Eligible Measure improvements. These may include such things as water conservation measures, roof replacement to accommodate solar PV installation, insulation, etc.

MCGB's *Installed Scope and Energy Savings Report*, Part C, lists the MCGB Eligible Measures. It is available to Authorized Contractors in Excel spreadsheet format on the Contractor page on the MCGB website. (See Attachment A for depiction of Part C of that form).

Energy Savings

Authorized Contractors are required to provide projected savings of energy consumption for their customer for a loan to qualify for the CLEER Program. Energy savings shall be determined from baseline usage, utilizing the *Installed Scope and Energy Savings Report*, Part B. (See Attachment B) This is consistent with the requirement for Authorized Contractor's to detail Eligible Measures to be included in a scope of work, and to provide a projection of energy consumption and cost savings approved by Pepco prior to commencement of work.

The CLEER Program targets projected energy savings of at least fifteen percent (15%) (measured against pre-project baseline energy consumption for the previous 12 months) as determined by the Authorized Contractor. Lower percentages of projected energy savings may be eligible with MCGB prior approval, which is sought through the Participating Lender (i.e., Authorized Contractors do not make the request directly of MCGB).

As described above, the Authorized Contractor also is responsible for providing the Installed Scope and Projected Energy Savings Report at Pre-approval and at the completion of work, and any changes from the form from when it was submitted for Pre-Approval must be noted.

MCGB Pre-Approval

All applications, inclusive of the entire project scope of work and the Authorized Contractor's projection for energy savings, must be submitted by the Participating Lender to MCGB for Pre-Approval prior to loan closing. During Pre-Approval, MCGB will:

- ✓ Review the *Installed Scope and Energy Savings Report*, Part B for energy savings projections that fall below 15% to determine if the loan is eligible for CLEER financing,
- ✓ Review the *Installed Scope and Energy Savings Report*, Part C and verify that at least one Pepco-approved Eligible Measure is included in the Scope of Work,
- ✓ Review the *Installed Scope and Energy Savings Report*, Part B and verify that Non-Eligible Measures do not make up more than 30% of the total financed amount,
- ✓ Verify that the Authorized Contractor's insurance is current,
- ✓ Verify that the Authorized Contractor's license(s) is current,
- ✓ Verify that the Authorized Contractor continues to be on the Pepco Service Provider list, and that it is considered to be "in good standing" with Pepco.

MCGB's Pre-Approval review is required prior to closing of CLEER Program loans. MCGB will provide such written pre-approval (or declination) to the Participating Lender within 5 business days of receipt of the MCGB required information from the Participating Lender, or the loan will be deemed pre-approved at that time. Note that use of the *Installed Scope and Energy Savings Report* will facilitate MCGB's expedited review pre-approval.

Section 6. Payment and Fees

Funds -- Initial Disbursement(s)

Notwithstanding any CLEER Program requirements, Participating Lenders may require their own approval of contractors to receive loan pre-funding. Authorized Contractors should contact each Participating Lender to learn about any such requirements.

The CLEER Program limits disbursements to Authorized Contractors to no more than fifty percent (50%) of the total loan proceeds, with the remaining funds payable after project completion documentation has been accepted by the lender and the MCGB. (Note: However, upon MCGB's prior written approval, MCGB may permit, based on request by Participating Lender, a Participating Lender to disburse up to 75 percent (75%) of loan proceeds prior to final disbursement for Program Loans of \$100,000 or more and utilizing a draw schedule to disburse funds.) Participating Lenders have the option to require smaller loan disbursements.

Funds -- Final Payment

The remaining loan balance is paid after several actions are performed:

- (i) Authorized Contractor obtains the borrower(s) signature(s) on the *Certificate of Completion* and completes the *Installed Scope and Energy Savings Report*.

NOTE: If multiple independent contractors are performing work as part of a larger project, each contractor must complete and submit their own form for the respective portion of the work once it is completed.

- (ii) Authorized Contractor emails the *Certificate of Completion* form and the *Installed Scope and Energy Savings Report* to the MCGB at contractors@mcgreenbank.org, and sends a copy to Participating Lender.

- (iii) MCGB reviews *Certificate of Completion* and *Installed Scope and Energy Savings Report* within three (3) business days.

NOTE: In the case of missing or inaccurate information, MCGB will return the *Certificate of Completion* or the *Installed Scope and Energy Savings Report* to the Authorized Contractor for revisions and inform the Participating Lender of this request.

- (iv) MCGB has notified the Participating Lender that the forms are complete.
- (v) The Participating Lender makes a service call to the Customer to confirm that the job was completed and informs the borrower that the Authorized Contractor(s) will receive final payment.

If there are multiple, unaffiliated contractors on a single job, the Participating Lender will pay each contractor a respective portion of the loan proceeds once that contractor's work is completed, subject to the foregoing requirements.

MCGB Fees

As described above in Section 2, MCGB charges the following CLEER Program fees:

- CLEER Program Fee to be included by Authorized Contractor: 2.99% of the total amount financed and paid out of loan proceeds. This fee helps sustain the operations of MCGB, including quality assurance functions. The Participating Lender will remit the MCGB CLEER Program fee at loan closing. If there is split funding with multiple contractors, the fee applies to each contractor's portion of the work.
- MCGB Origination Fee to be included by Participating Lender: 0.5% of the total amount financed and paid out of loan proceeds.
- MCGB Documentation Fee of up to \$50 may be included by Participating Lender within its own documentation fee that it assesses.

Other fees may include lender fees and any direct expenses incurred by lender to secure the transaction, such as UCC-1 filings. Please contact Participating Lenders to learn more.

Section 7. CLEER Program Forms

The Authorized Contractor will submit signed copies of the following forms:

Form Name	Purpose and Required Signatures	Submittal Instructions
<i>Customer Consent to Information Sharing and Disclosure Form</i>	Signed by business owner/borrower. Permits MCGB to receive and review information related to the work performed and receive information that it is necessary for MCGB reporting to Montgomery County and acknowledge ability to discuss lender's terms.	Obtained from Authorized Contractor by Participating Lender prior to loan closing.
<i>MCGB Certificate of Completion</i>	Signed by the Authorized Contractor and Business Owner after work is completed. Provides acknowledgement and documentation by both the Business Owner and Authorized Contractor that work has been completed.	Submitted by Authorized Contractor to MCGB by emailing to contractors@mcgreenbank.org and to Participating Lender.
<i>MCGB Installed Scope and Energy Savings Report</i>	Excel file, no signatures required. Has 3 components: 1) provides information to MCGB on actual work completed; 2) projected energy savings; and 3) uses of loan proceeds.	Submitted by Authorized Contractor to MCGB by emailing to contractors@mcgreenbank.org and to Participating Lender.

Note:

The *Customer Consent to Information Sharing and Disclosure* form, *Certificate of Completion* form and the *MCGB Installed Scope and Energy Savings Report* are available to Authorized Contractors on the MCGB website, on the "Contractors" page, where they may be easily downloaded.

Section 8. CLEER Program Marketing

Authorized Contractors shall collaborate with MCGB with respect to any press release or plans for any media coverage of the CLEER Program, including social media releases and postings made by the Authorized Contractor. The Authorized Contractor shall not make any public references to MCGB's name, logo, or MCGB programmatic offerings in any materials released, disseminated, or posted by Authorized Contractor or Participating Lender **without MCGB's prior written consent.**

MCGB is and shall remain the owner of all rights, title, and interest in and to the Montgomery County Green Bank Corporation name and CLEER Program materials, including, but not limited to, all copyrights and trademarks, all goodwill associated with and symbolized thereby, and all rights subsumed thereunder. The Authorized Contractor acknowledges that it shall not acquire any title, ownership, goodwill, or other interest in the Montgomery County Green Bank Corporation name or Program materials through its usage of same. The Authorized Contractor will stop all usage of the Montgomery County Green Bank Corporation name and Program materials immediately upon termination of the Authorized Contractor Agreement or the removal of its name from the Authorized Contractor list.

Section 9. MCGB Quality Assurance Functions

Authorized Contractors promoting MCGB financing must provide high-quality work and comply with MCGB requirements as outlined in these Guidelines. MCGB will perform certain post-completion quality assurance (“QA”) functions to assess that—on a consistent basis—the measures financed through MCGB qualify under the CLEER Program and were installed in accordance with applicable CLEER Program requirements. MCGB also may review the *Installed Scope and Energy Savings Report* with the scope of work submitted for Pre-Qualification and if different, verify that the Participating Lender and/or Pepco approved the changes.

The QA objectives are to:

- Verify that there are no fraudulent or misleading actions on the part of the Authorized Contractor.
- Understand customer satisfaction with the Authorized Contractor’s performance and quality of work.
- Verify that Authorized Contractors are meeting CLEER Program Guidelines in performing the work and related paperwork requirements.
- Clearly define and educate Authorized Contractors on the CLEER Program requirements to avoid problems and to proactively identify potential issues.
- Provide a process for evaluation of Authorized Contractor performance and workmanship and the resolution of identified problems.

The MCGB QA process does not impact the Final Payment of funding to an Authorized Contractor; however, should a problem be identified, it could impact an Authorized Contractor’s continued participation in the CLEER Program.

The QA process begins after the Authorized Contractor submits the *Certificate of Completion* and the *MCGB Installed Scope and Energy Savings Report* for a completed project.

As appropriate, MCGB issues corrective action requests to Authorized Contractors based on the findings outlined below.

MCGB may take actions to suspend or terminate contractor participation in the CLEER Program, depending on the severity and number of identified issues from the QA process.

The following are the steps MCGB will undertake for Quality Assurance:

1. MCGB conducts a Customer Satisfaction Survey. Each customer will be sent a survey after completion of construction.
2. For each Authorized Contractor:
 - a. MCGB will conduct an on-site inspection of the first two projects completed. During the site inspection, MCGB verifies the information on the *Certificate of Completion* and the *Installed Scope and Energy Savings Report*. Projects are generally site inspected within 45 days of completion.
 - b. After the first two projects, MCGB will randomly conduct an on-site inspection of Authorized Contractor completions. MCGB has set a target of inspecting at least five percent (5%) of all completed projects. An Authorized Contractor’s project may be chosen for this random inspection.
 - c. After each site inspection is complete, MCGB will inform the Authorized Contractor of results.
 - i. If CLEER Program violations are found during site inspection, MCGB will send the Authorized Contractor a Corrective Action Request (“CAR”).
 - ii. The Authorized Contractor is to remedy the issue identified in the CAR in an appropriate time frame.

- d. MCGB will conduct a desk review on all projects to review completed scope and final budget for meeting CLEER Program Eligible Measures.
3. Customers may provide independent feedback to MCGB.
4. On a periodic basis, MCGB reviews the site inspection, customer survey and feedback, and desk review results and makes determinations about Authorized Contractor status. If an issue is identified, the Authorized Contractor will be notified to determine if identified issues will be or have been corrected by Authorized Contractor. MCGB in its sole discretion will determine if the Authorized Contractor addressed the issue and may remain an Authorized Contractor.

Section 10. Contacts and More information

MCGB Contact Information

Go to <https://mcgreenbank.org/> for all forms, procedures, and promotional materials, which can be found on the “Contractors” page.

Questions regarding these guidelines, including eligible improvements and contractor qualifications, should be directed to MCGB at Contractors@mcgreenbank.org.

General questions about MCGB can be sent to info@mcgreenbank.org.

Participating Lender Contact Information

Ascentium Capital LLC

Josh Patton
Vice President - Sales
Ascentium Capital LLC
(281) 902-1969 (w)
(281) 921-3369 (f)
(586) 201-9699 (m)
JoshPatton@AscentiumCapital.com

Revere Bank

Horacio Chacon
Senior Vice President
Revere Bank
2101 Gaither Road, 6th Floor
Rockville, Maryland 20850
(301) 841-9583 (w)
(301) 841-9602 (f)
Horacio.Chacon@RevereBank.com

Installed Scope & Projected Energy Savings Report						
Project Completion Contractor Reporting						
<small>(Form Date: 2/8/2018)</small>						
Date Submitted for CLEER financing Pre-Approval:			-- Please insert date			
Date Submitted for Project Completion:			-- Please insert date			
Part C -- Sources and Uses of Funds						
		Uses of Funds	Sources of Funds			
		Estimated Associated Costs	Paid for by PEPCO Incentives	Paid for by CLEER Loan Proceeds	Paid for out of Owner's Cash	Other (e.g., grants)
MCGB CLEER Program Eligible Measures						
PEPCO Eligible Measures						
a	Chillers	\$ -	\$ -	\$ -	\$ -	\$ -
b	Custom (total)	\$ -	\$ -	\$ -	\$ -	\$ -
	[Custom Item]	\$ -	\$ -	\$ -	\$ -	\$ -
	[Custom Item -- add more if lines if necessary]	\$ -	\$ -	\$ -	\$ -	\$ -
c	Combined Heat and Power	\$ -	\$ -	\$ -	\$ -	\$ -
d	Full Building Tune-Up	\$ -	\$ -	\$ -	\$ -	\$ -
e	HVAC Tune-Up	\$ -	\$ -	\$ -	\$ -	\$ -
f	Kitchen-Refrigeration	\$ -	\$ -	\$ -	\$ -	\$ -
g	LED Sign Lighting	\$ -	\$ -	\$ -	\$ -	\$ -
h	Lighting Fixtures and Controls	\$ -	\$ -	\$ -	\$ -	\$ -
i	Misc. Energy Efficient Equipment	\$ -	\$ -	\$ -	\$ -	\$ -
j	Monitoring-Based Commissioning (MBCx)	\$ -	\$ -	\$ -	\$ -	\$ -
k	Operations and Maintenance Training	\$ -	\$ -	\$ -	\$ -	\$ -
l	Packaged HVAC Units	\$ -	\$ -	\$ -	\$ -	\$ -
m	Specialized Controls	\$ -	\$ -	\$ -	\$ -	\$ -
n	Variable Frequency Drives	\$ -	\$ -	\$ -	\$ -	\$ -
o = sum of a - n	Subtotal	\$ -	\$ -	\$ -	\$ -	\$ -
Additional MCGB Allowable Eligible Measures						
p	Photovoltaic	\$ -		\$ -	\$ -	\$ -
q	Energy Storage	\$ -		\$ -	\$ -	\$ -
r	HVAC Natural Gas	\$ -		\$ -	\$ -	\$ -
s = sum of p - r	Subtotal	\$ -		\$ -	\$ -	\$ -
t = o + s	Total MCGB CLEER Program Eligible Measures	\$ -	\$ -	\$ -	\$ -	\$ -
Other CLEER Financeable Improvements (items not included in Eligible Measures above)						
u	Water Conservation	\$ -		\$ -	\$ -	\$ -
v	Other (Please list)	\$ -		\$ -	\$ -	\$ -
w = u + v	Total Other Financeable Improvements	\$ -		\$ -	\$ -	\$ -
Other Items Included in Total Project Scope of Work:		\$ -		\$ -	\$ -	\$ -
<small>[Note this number may come from your total Scope of Work, which might include non-Energy-Related Items]</small>						
TOTAL PROJECT COSTS:		\$ -				
PEPCO INCENTIVES TO BE PAID:			\$ -			
CASH CONTRIBUTION:				\$ -		
OTHER:					\$ -	
TOTAL CLEER LOAN PROCEEDS (= t+ w):				\$ -		
Ratio of CLEER Program Eligible Measures to Total Loan Proceeds				#DIV/0!	Must represent 70% or more of total loan proceeds	
Ratio of Other Financeable Improvements to Total Loan Proceeds				#DIV/0!	May represent up to 30% of total loan proceeds	

Installed Scope & Projected Energy Savings Report						Total Projected Annual Savings (\$)				#VALUE!
Project Completion Contractor Reporting						Pre-Project		Post-Project		
<small>(Form Date: 2/8/2018)</small>										
Date Submitted for CLEER financing Pre-Approval: [] -- Please insert date										
Date Submitted for Project Completion: [] -- Please insert date										
Part B -- Projected Energy Savings Provided to PEPSCO for Scope of Work Performed Under the MCGB CLEER Program										
NOTE: If Scope of Work being financed under the CLEER Program will only impact electricity, the other usage categories do not need to be filled out.										
Source of Savings Projections: [FILL IN NAME OF MODEL USED]										
Prior 12 months Estimates are for the Period: []										
1. Estimated Current Usage						2. Projected Energy and Water Savings at Property				
<small>Please add more lines if necessary</small>										
	Meter Number	Account Number	Prior 12 Months or Calendar Year	kWh	Avg \$/kWh	kWh	% of Current Usage	% Savings	\$ Savings	
Annual Electricity Usage:				\$			#DIV/0!	#DIV/0!	#VALUE!	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
Annual Non-Electric Usage:	Meter Number	Account Number	Prior 12 Months or Calendar Year	Therms	Avg \$/Therm	Therms	% of Current Usage	% Savings	\$ Savings	
Natural Gas				\$			#DIV/0!	#DIV/0!	#VALUE!	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
Water Consumption	Meter Number	Account Number	Prior 12 Months or Calendar Year	1,000 G	Avg \$/1,000G	1000G	% of Current Usage	% Savings	\$ Savings	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
Sewage	Meter Number	Account Number	Prior 12 Months or Calendar Year	1,000 G	Avg \$/1,000G	1000G	% of Current Usage	% Savings	\$ Savings	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
Other	Meter Number	Account Number	Prior 12 Months or Calendar Year	Gallons	Avg \$/Gallon	Gallons	% of Current Usage	% Savings	\$ Savings	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
Other	Meter Number	Account Number	Prior 12 Months or Calendar Year	Gallons	Avg \$/Gallon	Gallons	% of Current Usage	% Savings	\$ Savings	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
				\$			#DIV/0!	#DIV/0!	#VALUE!	
				\$			#DIV/0!	#DIV/0!	#VALUE!	