



OFFICE OF REGULATORY STAFF - ENERGY OFFICE

1401 Main Street, Suite 900

Columbia, South Carolina 29201

Contact: Trish Jerman

Phone (803) 737-8030/ Fax (803) 737-9846

Conserfund Loans are for new projects ONLY. Acceptance of an application does not guarantee nor represent approval of a loan.

I. Applicant Information: (print clearly or type)

Type of Project: (must check one) Energy Retrofit Alternative Transportation

Name of Institution: _____

Street Address: _____

Mailing Address: _____

Federal Tax ID#: _____ **DUNS/SAM #:** _____

(Required if awarded-see attached form and instructions)

Contact Person: _____

Telephone: _____ **Email:** _____

Signatory Official: _____
(print or type)

Position: _____ **Email:** _____

Telephone: _____ **Fax:** _____

II. Type of Institution: Please check appropriate description

Public School District **County / City** **Municipality** **State Agency**

501(C)(3) Corporations* **Other Governmental Entity*** : Specify _____

*Documentation of *Secured Collateral* will be **required** for all non-profit 501(C) (3) organizations. If “Other Governmental Entity” is specified, the ORS Energy Office reserves the right to require secured collateral documentation also.

III. Loan Purpose: Provide complete description of project including building(s) list, if applicable, along with the information required in the [Technical Analysis Guidelines for Building Retrofits](#) or [Technical Analysis Guidelines for Fleet Conversions](#) (click here) **Include:** [Technical Analysis Summary Template](#). (click here)

- **Project Estimated Start Date (within 6 months of application date):** _____
- **Project Estimated Completion Date (within 12 months of start date):** _____

IV. Location(s) of Project: (May use separate sheet if additional space needed)

Name, Address, County and Square Footage of each building reflected in this loan application:

V. Technical Analysis: *Note: If more than one site/location, a technical analysis for each is required.*

Provide name of firm, telephone number and email address for the individual who completed the technical analysis: *(Technical Analysis Guidelines for Building Retrofits or Fleet Conversations available on website)*

VI. Project Cost Summary:

<u>Type of Improvements or Alternative Transportation Project</u>	<u>Estimated Cost</u>	<u>Projected Annual Savings</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

TOTALS: \$ _____ \$ _____

***Simple Payback:** _____

*(Calculating Simple Payback = divide total savings by total cost)

Note: ORS-Energy Office will review and approve or adjust results of the technical analyses, but cannot guarantee projected savings due to the large number of variables that may affect actual savings.

VII. Financing Information:

Requested Loan Amount: \$ _____ (Generally \$25,000-\$500,000)

Requested Financing Term: _____ /years. (Actual term will be determined by ORS-Energy Office, based on final estimated savings)

Current Interest Rate: 2.0 ***

***The interest rate is determined by the Conserfund Loan Committee every July 1st based on the Wall Street Journal Prime Rate and is offered as a program fixed rate until the following first day of July.

Loan Security: Non-profit 501(c)(3) organizations will be required to provide secured collateral documentation. Confirmation of the loan security, at least equal to the principal and interest loan balance, must be submitted with each loan payment. Please contact the ORS-Energy Office to discuss options regarding this requirement.

Non-Profit Applicants must identify their source of secured collateral when submitting their application.

Loans to public entities (state, schools, local governments) will be secured through 2012 SC Code Title 11 – Public Finance, Chapter 9, *Section 11-9-75*.

VIII. Accompanying Documents & Signature(s):

Note: These documents must be submitted for your application to be considered complete.

1. Copy of Technical Analysis which includes analyses for each project location.
2. Current Financial Statement providing year-to-date total assets, liabilities, revenue, State appropriations, etc.
3. Complete Financial Statements (Audited) for previous three (3) consecutive years.
4. Documentation identifying appropriate secured loan collateral after discussion with the ORS-Energy Office.

Applicant’s Signatory Official:

“I certify that by signing below, I have the legal authority to bind my organization and request this loan; that, if approved, this loan will be used for the authorized scope of work; and, that my organization owns the property involved in any energy retrofit project”.

Name: _____ (typed/printed)

Title: _____

Signature: _____ (L.S.) *(blue ink)*

Date: _____

Please send electronic submissions to tjerman@regstaff.sc.gov.

Physical documents may be mailed to Ms. Trish Jerman, Office of Regulatory Staff, Energy Office, **ATTN: LOAN PROGRAMS**, at the address indicated in the letterhead on page one of this application. [Telephone No.: (803) 737-8030]

Note...Important...Please review the following application check list before submitting your application.

CONSERFUND LOAN APPLICATION CHECK LIST

NOTICE...Your application cannot be considered officially submitted unless all required documents and information are received by the ORS-Energy Office.

Checklist: (check each applicable box)

1. Review all loan information, FAQ's and guidance documents at the ORS-Energy Office website [ConserFund Loan Information](#) before completing the application.
2. Provide all requested information on the application to allow the ORS-Energy Office to thoroughly evaluate the loan request.
3. Ensure application indicates the purpose of the loan request (i.e., energy retrofit or alternative transportation).
4. Ensure the projected beginning and completion dates are included on the application.
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5. Ensure required Technical Analyses are included with the application. (cost savings must be clearly represented for all project locations/buildings).
6. Review [ConserFund Technical Analyses Forms Related Links/Files](#) for building retrofits or alternative transportation projects. All information requested must be provided for review and evaluation.
7. Ensure inclusion of required current Financial Statements. (must include total assets, liabilities, revenue, State appropriations, etc.)
8. Ensure inclusion of **Audited** Financial Statement(s) for previous three (3) consecutive years.
9. Ensure required “Pay-Back” period is indicated on the application. (Section VI)
10. Ensure application includes Organizational Signatory Authority Name, Title and Signature.
11. Collateral Documentation – If your organization is a “Non-Profit” 501(c) (3) corporation, please identify the source of the loan security and collateral information. Ensure it is included with your application. Contact ORS-Energy Office for discussion of loan security requirements. [(803) 737-8030]
12. Ensure all the Organization's authorized individuals approved submittal of this application to obligate your entity and receive funding.

Complete evaluation of your application cannot be accomplished without all requested information.