

ConserFund Plus

Office of Regulatory Staff – Energy Office
1401 Main Street, Suite 900
Columbia, South Carolina 29201
Federal Award ID: DE-EE0000158 - CFDA #81.041
Contact: Trish Jerman
Phone (803) 737-8030/ Fax (803) 737-9846

ConserFund Plus Funding is for new projects ONLY. Acceptance of an application does not guarantee nor represent approval of a grant/loan.

I. Applicant Information: Please print clearly or type

Important Note: “ConserFund Plus” funding is available only to public school districts, SC State supported colleges and universities and state agencies.

Name of Institution: _____

Street Address: _____

Mailing Address: _____

Federal Tax ID#: _____ DUNS/SAM #: _____
(Required if awarded-Appendix III-[DUNS/SAM# FORM](#))
(Click here)

Project Coordinator: _____

Telephone: _____ Email: _____

Organization Head: _____
(print or type name)

Title: _____ Email: _____

Telephone: _____ Fax: _____

II. Type of Institution: Please check appropriate description

Public School District State supported College or University State Agency

III. Project Site Description: Provide project(s) information below: (attach additional sheets as necessary)

Energy Retrofit Project(s) Information	
Building Name	
Building Type	
Building Address/ Location & County	
Describe Proposed Energy Retrofits	

Alternative Fuel Project(s) –Provide complete detailed description of project

- **Project implementation must begin within six (6) months of the executed Loan Agreement (allow approximately 60 days for application/agreement processing).**

- **Project Estimated Start Date:** _____

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

IV. Technical Analysis: *Note: A technical analysis is required for each site location.*

Submit technical analysis in accordance with guidelines outlined in:

[Technical Analysis Guidelines for Building Retrofits](#) or [Fleet Conversions](#).

(click here)

(click here)

Must Include: [Technical Analysis Summary Template](#) (Appendix II)

(click here)

Technical Analysis Information	
Name/Title of Individual Who Completed Technical Analysis	
Telephone Number	
Email Address	
Energy Audit Firm or Architect/Engineering Firm	
Firm's Address	
Project Site Information	
Current Use	
Hours of Operation	
Square Footage	
Age of Building	

V. Project Cost Summary:

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

***Simple Payback:** _____

*(Calculate Simple Payback by dividing total savings by total cost)

Note: Simple Paybacks that exceed eight (8) years will require a variance from the ConserFund Loan Committee.

Important: If awarded an agreement based on this application, ORS-Energy Office’s review does not guarantee any minimum or maximum energy savings due to the large number of variables that may affect actual savings.

VI. Financial Information:

Requested Amount: \$ _____ (Equals Loan plus Grant Amount Combined)

“Requested Amounts” are generally between \$25,000 and \$500,000. Application requests exceeding \$500,000 must include a justification.

Loan: The Loan portion of the agreement will consist of seventy percent (70%) of the approved amount. The current interest rate will apply to the loan amount only.

Grant: The Grant portion of the agreement will consist of thirty percent (30%) of the approved amount.

Example: \$500,000 approved; 70% (\$350,000) is the loan amount which is subject to the current interest rate; 30% (\$150,000) is the grant amount.

Requested Financing Term: _____/year(s). Actual term will be determined by ORS-Energy Office, based on estimated savings. In general, terms will not exceed 1.5 times the expected payback period.

Current Interest Rate: 2.0% (fixed rate for the life of the loan)*

* *Note: The interest rate may be reassessed and set by the Conserfund Loan Committee every July 1st and will apply as a fixed rate for all loans closed during the upcoming fiscal year.*

Project Budget Form: Complete the attached Project Budget Form ([Project Budget Form – \(click here\)](#) Appendix I) and submit with your application. (completed example form available in FAQ’s [Example Budget Form for Reference](#)).
(click here)

Loan Security: ConserFund Plus loans will be secured through the SC State Treasurer’s Intercept process, Chapter 9, Section 11-9-75 SC Code of Laws.

VII. Funding Source Information and Obligations:

By submitting a ConserFund Plus Application, the applicant understands all applicable funding obligations including the ARRA Flow Down Requirements (see “Attachment A” - [Funding Flow-Down Requirements](#))
(click here)

1. **Applicant’s Responsibility** - The Applicant shall be fully acquainted with conditions relating to the scope and restrictions applicable to an award as a result of this application. The failure or omission of Applicants to acquaint themselves with existing conditions shall in no way relieve them of any obligation with respect to the award. Recipients and sub recipients must comply with all applicable federal, state and local laws and regulations.

The Applicant will be required to assume sole responsibility for the complete effort as required by the award. ORS-Energy Office will consider Applicants to be the sole point of contact with regard to all award matters.

All School Districts: Are responsible for complying with all construction, renovation and retrofit requirements of the Office of School Facilities (OSF), SC Department of Education. The ORS-Energy Office does not assume any responsibility for obtaining or verifying OSF compliance.

2. **Funding Source** - Funding for the ConserFund Plus program is provided entirely from the State Energy Program, American Recovery and Reinvestment Act (ARRA), for energy efficiency and renewable energy improvements.
 - a. Federal Award Identifier: DE-EE0000158
 - b. CFDA Number: 81.041

3. **Mandatory Funding Obligations:** Review *Application Attachment A* for all requirements associated with receiving funding under the ConserFund Plus Loan/Grant Program. In particular, projects must adhere to the Buy American Provisions of ARRA and the Davis Bacon Wage Reporting requirements, including paying the designated wages on a weekly basis and maintaining wage payment records. Wage payment records must be included as documentation with corresponding reimbursement requests. The ORS-Energy Office encourages awardees to submit reimbursement requests on a monthly basis.
4. **Nonexpendable Equipment Definition** – Nonexpendable equipment is defined as equipment with an acquisition cost in excess of five thousand (\$5,000.00) dollars and a life greater than one (1) year. Any nonexpendable equipment purchased with any portion of funds awarded pursuant to this application must be appropriately inventoried and must be used for the purposes consistent with the intent of the award. Records of equipment purchases must be maintained throughout the agreement period and the disposition of each item must be reported to the ORS-Energy Office. Such equipment may not be removed from the premises or disposed of without the written permission of the ORS-Energy Office until said equipment depreciates to a value below \$5,000.
5. **Monitoring Visit** - The ORS-Energy Office will conduct an on-site project monitoring/inspection visit prior to making the final loan disbursement.
6. **Federal Audits** - If Federal audit requirements are applicable to your organization, the audit should be completed within nine (9) months of the close of your fiscal year.

VIII. Accompanying Documents & Signature(s):

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

1. Technical 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. Completed Project Budget Form – Appendix I
 5. Completed Technical Analyses Summary – Appendix II
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IX. Applicant’s Signatory Official:

“I certify that by signing below, I have the legal signatory authority to bind my organization and request this loan/grant; that, if approved, (a) these funds will be used for the authorized scope of work; and, (b) that my organization owns the property involved in the energy retrofit project(s) or (c) the applicant is a State Agency designated as the controlling agency of the property titled to the State of South Carolina”

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, ORS-Energy Office, ATTN: LOAN PROGRAMS, at the address indicated on page one. (Telephone No.: (803) 737-8030)

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

CONSERFUND PLUS APPLICATION CHECK LIST

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

1. Review all loan information, FAQ's and guidance documents at the ORS-Energy Office website [ConserFund PLUS Loan Information](#) before completing the application.
2. Provide all requested information on the application to allow the ORS-Energy Office to thoroughly evaluate your loan request.
3. Section III - Ensure the projected beginning and completion dates are included on the application.
4. Section IV and Appendix II - Ensure required Technical Analyses are included with application. (Cost savings must be clearly represented for all project locations/buildings).

Application must include each building, type, current use, hours of operation, square footage and description of proposed improvements; previous twelve months of billing history for energy usage (gas and electric) for the facility to be retrofitted.

5. Section IV and Appendix II - Ensure Technical Analysis Summary is included with your application submission.
6. Section VI - Ensure required “Pay-Back” period is included on the application.
7. Section VI and Appendix I - Ensure Projected Budget Form is completed and all additional budget/financing information is included with your application submission. (example budget form available in FAQ's)
8. Section VII – Review all funding source information and obligations to ensure a complete understanding of all requirements.
9. Section VIII - Ensure all required documents and information are included with your application.

A year-to-date and three years of audited financial statements must be included with your application. (must include total assets, liabilities, revenue, State appropriations, etc.)

10. Section IX - Ensure application includes Organizational Signatory Authority Name, Title and Signature.
11. Attachment A - By submission of the application, I certify I have read and understand Application *Attachment A* “Flow-Down Requirements” and if awarded agree to comply with all applicable requirements.
12. Ensure all the Organization's authorized individuals approved submittal of this application to obligate your entity and receive funding.