

# ENERGIZE MISSOURI

## SCHOOLS AND LOCAL GOVERNMENTS

MISSOURI DEPARTMENT OF NATURAL RESOURCES

### ENERGY LOANS

## PROGRAM GUIDELINES

American Recovery and Reinvestment Act of 2009

State Energy Program

Mail Form to:

Missouri Department of Natural Resources

1101 Riverside Drive

P.O. Box 176

Jefferson City, MO 65102-0176



**MISSOURI**  
DEPARTMENT OF  
NATURAL RESOURCES

**Energize Missouri Schools & Local Governments – School & Local Government Energy Loan Program  
Application Forms  
Form A  
Application**

**Applicant Information**

Applicant Full Name	DUNS Number	\$ Loan Funds Requested
Mailing Address	City	Zip Code + 4
Primary Contact Name	Title	E-mail Address
Telephone Number	Fax Number	

**Facility Ownership**

Do you, the applicant:

<input type="checkbox"/> Own the facility.	____ Number of years owned.
<input type="checkbox"/> Other (must explain).	

**Financial Background**

Applicants are required to provide sufficient financial background information so that an accurate financial status of the applicant can be determined.

Applicant has included the following:

Most recent audit report

Taxpayer ID:

FEIN (Tax ID#). \_\_\_\_\_

**Authorization to Obtain Credit Information**

I understand that the application for a loan authorizes the Missouri Department of Natural Resources (Department) to obtain credit information. No further notice of subsequent access to this information shall be provided during the term of the loan.

Printed Name of Authorized Official	Signature of Authorized Official	Date
--	-------------------------------------	------

Reserved for Missouri Department of Natural Resources Use		
Date Received	Time Received	Proposal Number Assigned

***Energize Missouri Schools & Local Governments – School & Local Government Energy Loan Program***  
**Application Forms**  
**Form A**  
**Application**

**Project Site Information**

Project Title	Primary Activity	
Project Site Address	City	Zip Code + 4
Size of facility (sq.ft)		
Electric utility	Gas utility	

**Energize Missouri Schools & Local Governments – School & Local Government Energy Loan Program**  
**Application Forms**  
**Form A**  
**Application**

**Applicant Background**

Please answer the following questions below for the organization for which you are applying for a School & Local Government Energy Loan:

#	QUESTION	YES	NO	JUSTIFICATION / DETAILS
1	Is the project for which you are seeking loan funding located within the State of Missouri?	<input type="checkbox"/>	<input type="checkbox"/>	If no, projects located outside the State of Missouri are not eligible for funding.
2	Have you previously received a loan from the Missouri Department of Natural Resources (Department)?	<input type="checkbox"/>	<input type="checkbox"/>	If yes, please explain.
3	Do you hold any permits from the Department? If yes, please list all permits held for the past five years. (use a separate sheet if needed)	<input type="checkbox"/>	<input type="checkbox"/>	List all permits current to the past five years. Attach a separate sheet as needed.
4	If you answered yes to question #3, have you ever been fined or found in violation of any permits held with the Department?	<input type="checkbox"/>	<input type="checkbox"/>	If yes, please explain.
5	Are 50 gallons or more of any regulated chemicals used on your property, if so, please list?	<input type="checkbox"/>	<input type="checkbox"/>	List all regulated chemicals. Attach a separate sheet as needed.
6	What is the total value of your property?	\$		
7	Is any of your property in the Flood Plain?	<input type="checkbox"/>	<input type="checkbox"/>	
8	Have you ever received FEMA dollars?	<input type="checkbox"/>	<input type="checkbox"/>	

***Energize Missouri Schools & Local Governments – School & Local Government Energy Loan Program***  
**Application Forms**  
**Form A**  
**Application**

**Applicant Signature**

I hereby certify that I am authorized to submit this application and that the information presented in this application is true and accurate. In addition, I agree to abide by all the terms and conditions described in the Missouri Department of Natural Resources “*Energize Missouri Schools & Local Governments – School & Local Government Energy Loan Program Guidelines*”, application forms, and all supporting documents.

\_\_\_\_\_  
Printed Name of Authorized  
Official

\_\_\_\_\_  
Signature of Authorized  
Official

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title

***Energize Missouri Schools & Local Governments – School & Local Government Energy Loan Program***  
**Forms**  
**Form B**  
**Project Information**

**Project Information**

Provide information regarding how the loan will be spent.

Proposed Project Start Date: \_\_\_\_\_

Proposed Project Completion Date: \_\_\_\_\_

Brief Project Description:

**Metrics Activity**

Complete this section after working through Application Forms C through F.

Jobs Created or Retained:	_____	FTE
Annual Energy Savings:	_____	kWh
GHG Emissions Reduced:	_____	CO <sub>2e</sub>
Project Simple Payback	_____	Years

**Project Narrative and Benefits**

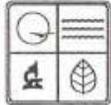
Provide a description of how the proposed loan will be used. Discuss the proposed project for which funding is requested, including goals and objectives, the overall impact and benefits of the project and a statement of work (required tasks and activities). Applicants should describe the existing system and the proposed energy efficiency measures. The narrative may be used to explain budget details.

*Energize Missouri Schools & Local Governments* – School & Local Government Energy Loan Program  
Forms  
Form B  
Project Information

A large, empty rectangular box with a thin black border, occupying most of the page. It is intended for the user to provide project information.



**Energize Missouri Schools & Local Governments - School & Local Government Energy Loan Program Forms**  
**Form C**  
**Energy Usage Information**



MISSOURI DEPARTMENT OF NATURAL RESOURCES

**FUEL USE SUMMARY**

APPLICANT ORGANIZATION NAME	
SPECIFIC BUILDING OR SYSTEM NAME	
TOTAL AREA COOLED IN SQUARE FEET	TOTAL AREA HEATED IN SQUARE FEET

MONTH	YEAR	UTILITY PROVIDING FUEL			UTILITY PROVIDING FUEL		UTILITY PROVIDING FUEL	
		ELECTRIC			NATURAL GAS		FUEL OIL/LPG/ OR OTHER _____	
		USAGE (kWh)	DEMAND (kW)	COST \$	USAGE (_____)	COST \$	USAGE (_____)	COST \$
JANUARY								
FEBRUARY								
MARCH								
APRIL								
MAY								
JUNE								
JULY								
AUGUST								
SEPTEMBER								
OCTOBER								
NOVEMBER								
DECEMBER								
<b>ANNUAL TOTAL</b>								

***Energize Missouri Schools & Local Governments - School & Local Government Energy Loan Program Forms***  
**Form D**  
**Efficiency Measures**

**Efficiency Measures**

For every energy efficiency measure to be implemented, the applicant must complete all tables included in this form. The applicant may print out additional copies of the tables as needed.

- **Energy Efficiency Measure:** identify the new items to be purchased and installed. Identify any existing equipment or items to be replaced, upgraded or retrofitted
- **Unit Cost:** provide the cost of purchasing one unit
- **Installation Cost:** identify the labor cost related to installing the energy efficiency measure
- **Annual Energy Savings:** identify the expected annual energy savings (in kWh) to be achieved
- **Average Utility Rate:** identify the average annual utility rate that was paid to the utility company during the previous year for facility operations
- **Total Cost:** includes purchase price and installation costs
- **Simple Payback:** represents the amount of time it will take to recover the project's investment through reduced or avoided energy costs. It is calculated by dividing the purchase price and installation costs (\$) by annual energy savings multiplied by the average annual utility rate

		(A)	(B)	(C)	(D)	(E)	(A *B) + (C) = (F)	$\frac{(F)}{(D) * (E)}$
	Energy Efficiency Measure/ Equipment (include year/make/model, horsepower (HP), efficiency)	Unit Cost (\$)	Quantity	Installation Cost (\$)	Annual Energy Savings (kWh)	Average Annual Utility Rate (\$/kWh)	Total Cost (\$)	Simple Payback (years)
1	New:  Replaces:							
2	New:  Replaces:							

*Energize Missouri Schools & Local Governments - School & Local Government Energy Loan Program Forms*  
**Form D**  
**Efficiency Measures**

		(A)	(B)	(C)	(D)	(E)	(A*B) + (C) = (F)	$\frac{(F)}{(D) * (E)}$
	Energy Efficiency Measure/ Equipment (include year/make/model, horsepower (HP), efficiency)	Unit Cost (\$)	Quantity	Installation Cost (\$)	Annual Energy Savings (kWh)	Average Annual Utility Rate (\$/kWh)	Total Cost (\$)	Simple Payback (years)
3	New:  Replaces:							
4	New:  Replaces:							
5	New:  Replaces:							
<b>Totals</b>								

***Energize Missouri Schools & Local Governments - School & Local Government Energy Loan Program Forms***  
**Form D**  
**Efficiency Measures**

**Bundled Simple Payback**

Use the information from above to complete the table below.

(A)	(B) * (C)	$\frac{(A)}{(B) * (C)}$
Sum of Total Cost	Sum of Annual Energy Savings x Average Annual Utility Rate	Bundled Simple Payback

**Energize Missouri Schools & Local Governments - School & Local Government Energy Loan Program  
Forms  
Form E  
Energy Metrics**

**Jobs Created or Retained**

Labor Activity	(A) Proposed Start Date	(B) Proposed Completion Date	(C) Working Days between Start Date and Completion Date (days)	(D) = (C) x 8 Cumulative Hours on a Full-Time Schedule (hrs)	(E) Hours Worked on Labor Activity (hrs)	(F) = (E) / (D) Jobs Created or Retained (FTE)
Installation of Equipment						
<b>Total</b>						

**Annual Energy Savings and GHG Emissions Reduced**

	(A) Annual Energy Savings (kWh)	(B) GHG Emission Factor (MT CO <sub>2</sub> e/kWh)	(C) = (A) x (B) GHG Emissions Reduced (MT CO <sub>2</sub> e)
<b>Total</b>		0.00083462	

**Energize Missouri Schools & Local Governments – School & Local Government Energy Loan Program  
Forms  
Form F  
Project Budget**

**Budget Summary**

Budget Item	(A) Loan Funds Requested (\$)
Equipment & Materials	
Direct Labor	
Contractual Services	
Other (please explain below)	
<b>Total</b>	\$

Other budget items:

**Detailed Budget**

**Equipment/Materials:** List all items of equipment/materials to be purchased with a total value greater than \$100. Identify the manufacturer of the equipment/materials as well as the model and the rated capacity, if applicable. The applicant must include a copy of the manufacturer’s specifications for every item listed.

Equipment/Material	Make/Model and Manufacturer	Quantity	Unit Cost (\$)	Total Cost (\$)	Loan Funds Requested (\$)
<b>Total</b>				\$	\$

**Energize Missouri Schools & Local Governments – School & Local Government Energy Loan Program  
Forms  
Form F  
Project Budget**

**Direct Labor/ Contractual Services:** List all applicable costs for design, construction, or installation.

Title/Job Classification	Direct Labor		Number of hours	Billing Rate (\$/hr)	Total Cost (\$)	Loan Funds Requested (\$)
	Yes	No				
	<input type="checkbox"/>	<input type="checkbox"/>				
	<input type="checkbox"/>	<input type="checkbox"/>				
	<input type="checkbox"/>	<input type="checkbox"/>				
	<input type="checkbox"/>	<input type="checkbox"/>				
	<input type="checkbox"/>	<input type="checkbox"/>				
	<input type="checkbox"/>	<input type="checkbox"/>				
	<input type="checkbox"/>	<input type="checkbox"/>				
	<input type="checkbox"/>	<input type="checkbox"/>				
	<input type="checkbox"/>	<input type="checkbox"/>				
<b>Total</b>					\$	\$

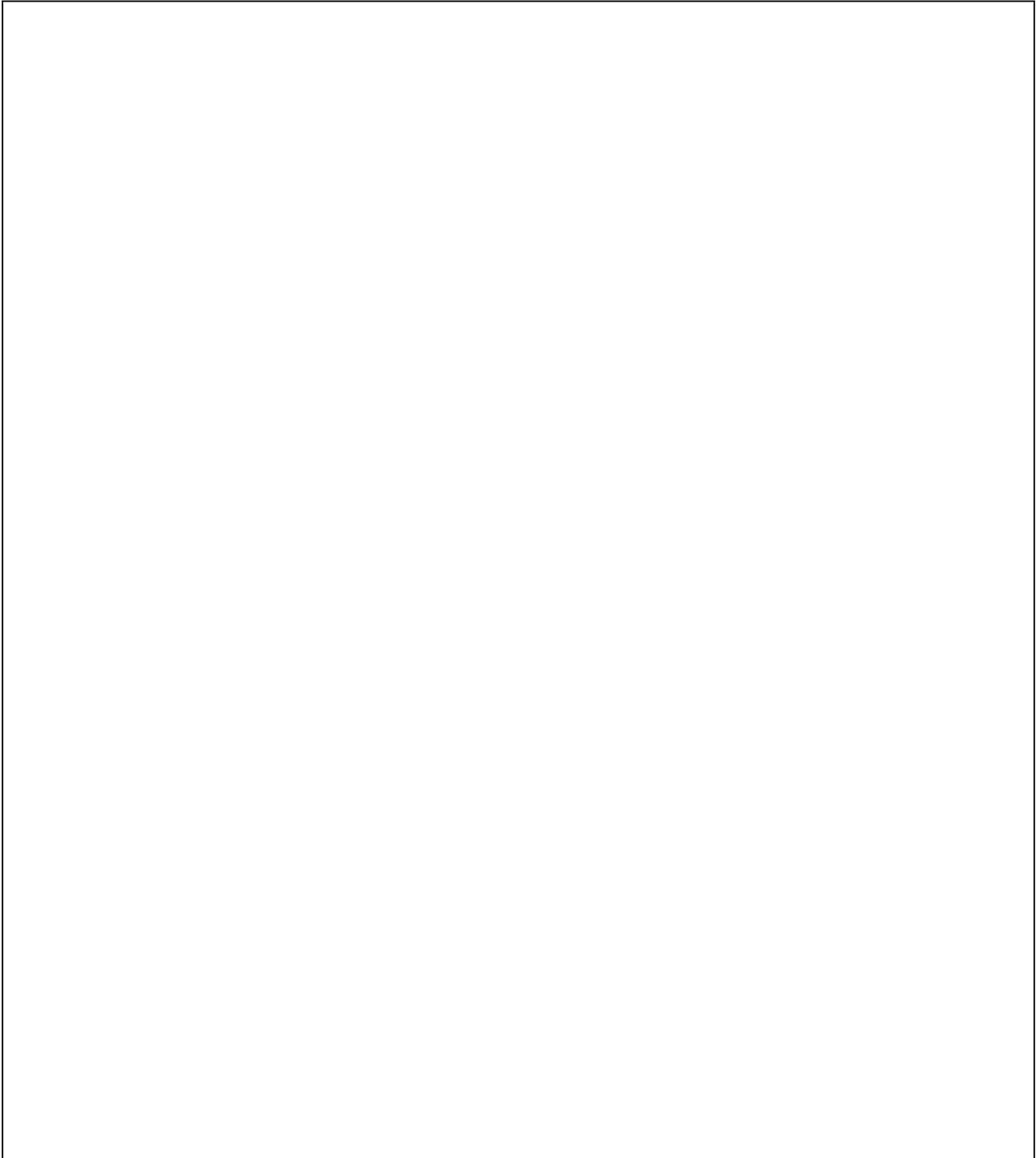
**Other:** List all other costs associated with project implementation not included in the above categories. The Department reserves the right to not provide loan funds for other costs not included in the above categories.

Purpose	Loan Funds Requested (A)	Required Contribution (B)	Total Cost (\$) (C)
<b>Total</b>			\$

*Energize Missouri Schools & Local Governments - School & Local Government Energy Loan Program*  
**Forms**  
**Form G**  
**Waste Stream**

**Waste Stream Description**

Indicate if the proposed project will generate a waste stream. For activities that will generate a waste stream, describe the waste and your methodology for waste handling and disposal.

A large, empty rectangular box with a thin black border, intended for the user to provide a detailed description of the waste stream generated by the proposed project, including the type of waste and the handling and disposal methodology.

**Energize Missouri Schools & Local Governments - School & Local Government Energy Loan Program**  
**Forms**  
**Form H**  
**National Environmental Policy Act**

**Applicability of NEPA to the Proposed Project**

Please refer to **Exhibit D** of the Program Guidelines for the complete EF-1 form.

The proposed project is categorically excluded from NEPA because it falls within the following category and does not involve "extraordinary circumstances" within the meaning of 10 C.F.R. Section 1021.410:

Funding energy efficiency retrofits, provided that projects are limited to: Installation of insulation; installation of energy efficient lighting; HVAC upgrades; weather sealing; purchase and installation of ENERGY STAR appliances; replacement of windows and doors; high efficiency shower/faucet upgrades; and installation of solar powered appliances with improved efficiency.

Development, implementation, and installation of onsite renewable energy technology that generates electricity from renewable resources, provided that projects are limited to:

- Solar Electricity/Photovoltaic - appropriately sized system or unit on existing rooftops and parking shade structures; or a 60 KW system or smaller unit installed on the ground within the boundaries of an existing facility.
- Wind Turbine - 20 KW or smaller.
- Solar Thermal - system must be 20 KW or smaller.
- Solar Thermal Hot Water - appropriately sized for residences or small commercial buildings.
- Ground Source Heat Pump - 5.5 tons of capacity or smaller, horizontal/vertical, ground, closed-loop system.
- Combined Heat and Power System - boilers sized appropriately for the buildings in which they are located.
- Biomass Thermal - 3 MMBTUs per hour or smaller system with appropriate Best Available Control Technologies (BACT) installed and operated.

The proposed project falls within the categories listed above but may involve "extraordinary circumstances" within the meaning of 10 C.F.R Section 1021.410, for the following reason(s)

The EF-1 Environmental Questionnaire has been completed and attached.

The proposed project is not categorically excluded, for the following reason(s)

The EF-1 Environmental Questionnaire has been completed and attached.

**Energize Missouri Schools & Local Governments - School & Local Government Energy Loan Program  
Forms  
Form I  
National Historic Preservation Act**

**Description of Project Site. All Applicants MUST include a photo of the façade of each existing facility as well as a map showing its exact location as attachments to this form.**

Does your project involve a building or structure included in the National Register of Historic Places (NRHP) or one eligible for inclusion in the NRHP?

Yes

No

If the proposed project involves a building or structure listed on or eligible for the NRHP, Applicant must complete additional information in Item 5 of the EF-1 Environmental Questionnaire (Exhibit D of the Program Guidelines).

Has Item 5 of the EF-1 been completed for projects on or eligible to be included in the NRHP?

Yes

No

All applicants must complete the below sections regardless of answers to the above two questions.

Provide information on the facility:

Site Name	Site Address	Age of Original Structure (Year Built/Constructed)

Brief Description of the Facility: