**FY21**

**Jane E. Lawton**

**Conservation Loan Program**

**Application Packet**

**MARYLAND STATE AGENCIES NOTE:**

**Since Fiscal Year 2020, the *Jane E. Lawton Conservation Loan Program* has included State agencies among eligible borrowers. The Lawton program now supplants the**

***State Agency Loan Program* (SALP).**



**FY21 Jane E. Lawton Conservation Loan Program**

**Introduction**

Thank you for submitting an application to the Jane E. Lawton Conservation Loan Program (“Lawton Loan Program” or “the Program”) implemented by the Maryland Energy Administration (“MEA”). The Lawton Loan Program finances investments that improve the **energy efficiency** of stationary facilities. Eligible borrowers include Maryland businesses, nonprofit organizations, and local jurisdictions, to which the program offers low-interest loans (currently 1.00%). State Agencies are eligible to apply under this Program for zero-interest loans.

Lawton Loans are structured so that repayment schedules are tied to actual savings generated by the energy efficiency improvements—known as energy conservation measures or “ECMs.” ECMs may include, but are not limited to: lighting retrofits; heating, ventilation, and air conditioning (HVAC) upgrades, and related mechanical measures and controls; building management information systems; and specialty equipment upgrades or replacements (such as lab hoods, refrigeration motors, etc.). The energy efficiency project may bundle multiple ECMs together; however, each individual ECM must pay for itself through reduced operating expenses, including energy costs, within the ECM’s expected useful life[[1]](#footnote-1). MEA will then use the simple payback of all of the measures in aggregate to determine the term of the loan. Loan terms for business, nonprofit organizations, or local jurisdictions may not exceed 13 years. For a state agency, the measures in aggregate must have a simple payback of 13 years or less. State agencies may also obtain a Lawton Loan for finance incremental to an energy performance contract (EPC), thereby expanding the number and variety of projects provided by the EPC.

Lawton Loans can be made for ECMs that retrofit or replace existing equipment/fixtures in existing facilities, or for the installation of energy-efficient equipment/fixtures in facilities which have yet to be constructed. **Replacement and retrofit projects** can receive funding for up to 100% of the total project cost, less any applicable rebates, incentives, or other leveraged funding sources. **New construction projects** can receive funding for up to 100% of the incremental cost of the ECMs. “Incremental cost” is defined as the installation cost of an energy efficient equipment/fixture minus the installation cost of an alternative “standard” investment that provides only code-minimum performance.

All applicants must submit a completed application package. Please carefully read the following pages of the application package and provide all required information. Incomplete and incorrect information will delay the review process, so be sure to check that all necessary fields are complete and that all required attachments are provided in the initial application package prior to submission. Reviews of the proposed project’s energy savings generally take approximately 45 days to complete, but this timeframe may vary based on the volume of loan applications. MEA may request additional or clarifying information during its review, and will provide in writing its determination of whether or not the project will be funded with a Lawton Loan. State agencies do not bear an application fee, but will have a 1% administration fee folded into the first repayment made for any loan awarded under this Program.

**\*\*SEE CHECKLIST FOR COMPLETING THIS APPLICATION on last page\*\***

**State Agency Loan Application**

Please carefully read the following sections and provide the requested information. If you are submitting an application electronically, please email all required documentation to Lawton.MEA@maryland.gov. Applications may also be submitted via USPS. If mailing a physical copy of the application, please forward the application package to the following address:

Maryland Energy Administration

Attn: Lawton Loan Program

1800 Washington Boulevard, Suite 755

Baltimore, MD 21230

**Project Eligibility**

All proposed energy efficiency projects must meet the following criteria to be eligible for a Lawton Loan.

[ ]  The energy efficiency project will be installed on or in a facility owned or leased by the applicant Agency.

[ ]  The energy efficiency project will be located within the State of Maryland.

[ ]  The aggregate simple payback does not exceed 13 years.

**Required Supporting Documentation**

All applicants are required include energy savings calculations or estimates for all proposed energy measures being submitted for potential Lawton loan funding. (Please include the source of the calculations and clearly state all assumptions.) If unable provide such data at time of application, please explain:

|  |
| --- |
|  |

**Optional Supporting Documentation**

While not required as part of the Application package, it is strongly recommended all applicants provide the following documents, if available.

[ ]  Energy Efficiency Project Feasibility Study

[ ]  Energy Audit of the facility to receive upgrades

[ ]  Completed Utility Rebate Applications for any ECMs eligible for utility rebates

**Additional Supporting Documentation**

If you have provided any additional supporting documentation not specified above which you believe would be beneficial in the review of the Application package, please list each additional item below, referring to attachments, as needed:

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**Loan Data Collection**

Please provide all information requested in the following sections.

Incomplete or missing information will result in delayed processing of the Application package.

Has the applicant Agency previously applied to MEA for funding for this energy efficiency project?

[ ]  No

[ ]  Yes, previously applied for a Lawton Loan or a State Agency Loan Program (SALP) loan

[ ]  Yes, previously applied for other MEA funding (please specify the funding source below – e.g. Data Center Grant Program, CHP Grant Program, etc.):

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| --- |
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**Agency Administrative Information**

|  |
| --- |
| Applicant Agency – Official Name |
|  |
| Mailing Address |
|  |
| Borrower’s Primary Point of Contact (“PPC”) or Project Manager  |
| Full Name:Title:Phone Number:Email Address: |
| Authorized Representative of Borrower\* | Legal Counsel |
| Name:Title:Phone Number:Email Address: | Name:Title:Phone Number:Email Address: |
| Does this loan support an energy performance contract (EPC) for a state agency? | If an EPC for a state agency, who is the fiscal point of contact for the borrowing agency? |
| [ ]  Yes[ ]  No | Name:Title:Phone Number:Email Address: |
| For an EPC only: State of Maryland DGS point of contact  |
| Name:Title:Phone Number:Email Address |

*\*Individual with authority to enter Agency into legally-binding agreements (such as grants and loans)*

**Energy Efficiency Project Site Information**

|  |  |
| --- | --- |
| Official Name of Facility or Complex | Street Address |
| [ ]  Existing Structure(s) [ ]  New Construction | [ ]  Same as Mailing Address  |
| Type of Facility (e.g. office building, warehouse, etc.) | Facility/Complex Size Information |
|  | Total No. of Buildings:Total Floor Area (sq. ft.):  |
| If project site is owned by the Applicant Agency: | If project site is leased by the Applicant Agency: |
| List all Mortgage Holder(s) and Secured Parties: | Name of Lessor:Term of Lease: |
| Facility/Complex District Information | Utility Service Territory |
| *Search districts at* [*http://www.mdelect.net*](http://www.mdelect.net)Congressional District: Choose an item.Legislative District: Choose an item. | [ ]  BGE [ ]  Pepco [ ]  Potomac-Edison [ ]  Delmarva[ ]  SMECO [ ]  Choptank Electric Cooperative[ ]  Other (Specify): |
| List all account types and numbers for electric, gas, and other utilities serving the building/complex: |
|  |

**General Condition of Project Site (Existing Structure(s) Only)**

Describe the general condition of the building(s) to receive the proposed ECMs in the space below. Include the age of the structure(s) and condition of any existing energy-consuming equipment or fixtures to be replaced.

|  |
| --- |
|  |

**Electricity Consumption Metrics**

The following information should be for the entire project site (all buildings). For projects in facilities yet to be constructed, the energy consumption and cost assumptions for the first stabilized year of operation year should be modeled assuming that standard, code-minimum equipment/fixtures are installed.

|  |  |
| --- | --- |
| Total Electricity Consumption (kWh) from Previous Year (or for new construction: first stabilized year of operation) for the entire site | Projected Annual Electricity Savings from Proposed Project (kWh) |
|  |  |
| Non-electric Fuel Consumption from Previous Year(Specify fuel type – e.g. MMBtu, gallons of propane, etc.) for the entire site | Projected Annual Non-electric Fuel Savings from the proposed project(Specify fuel type – e.g. MMBtu, gallons of propane, etc.) |
|  |  |
| Total Energy Costs from Previous Year (or for new construction: costs modeled for first stabilized year of operation) | Projected Annual Energy Cost Savings |
| Total Electric Costs: $Total Non-electric Costs: $ | Total Electric Savings: $Total Non-electric Savings: $**Total Savings (Electric + Non-electric):****$** |

**Proposed Energy Conservation Measures**

Please describe each proposed ECM in the tables below. If your project employs more than five (5) ECMs, you may copy and add as many tables as necessary to capture all ECMs. Information provided in the Existing or Baseline Equipment Description box should:

For Retrofit and Replacement Projects

Identify the type of existing equipment/fixtures, and model number(s), if available.

For New Construction Projects

Identify the type of equipment/fixtures used for the baseline assumptions.

If the operational schedule of the equipment to be replaced does not adhere to a standard 12-month timeframe (e.g. seasonal operations only), please leave the Hours of Operation sections blank in the tables below and instead attach a description of the typical operational schedule for a 12-month timeframe.

**ECM 1**

|  |  |
| --- | --- |
| Existing or Baseline Equipment Description | Existing or Baseline Hours of Operation |
|  | Mon. – Fri.:Saturday:Sunday: |
| Proposed New Equipment | Proposed Hours of Operation |
|  | Mon. – Fri.:Saturday:Sunday: |
| Projected Annual Energy Savings(Specify type – kWh, MMBtu, gallons of propane, etc.) | Projected Annual Energy Cost Savings |
|  | $ |
| What is the expected useful life of the ECM (in years)? This information should be obtained from the most recent version of the Mid-Atlantic Technical Reference Manual (TRM) available at <https://neep.org/mid-atlantic-technical-reference-manual-trm-v9>. | If not listed in the Mid Atlantic TRM, please provide other supporting documentation of anticipated expected useful life. |
|  |  |

**ECM 2**

|  |  |
| --- | --- |
| Existing or Baseline Equipment Description | Existing or Baseline Hours of Operation |
|  | Mon. – Fri.:Saturday:Sunday: |
| Proposed New Equipment | Proposed Hours of Operation |
|  | Mon. – Fri.:Saturday:Sunday: |
| Projected Annual Energy Savings(Specify type – kWh, MMBtu, gallons of propane, etc.) | Projected Annual Energy Cost Savings |
|  | $ |
| What is the expected useful life of the ECM (in years)? This information should be obtained from the most recent version of the Mid-Atlantic Technical Reference Manual (TRM) available at <https://neep.org/mid-atlantic-technical-reference-manual-trm-v9>. | If not listed in the Mid Atlantic TRM, please provide other supporting documentation of anticipated expected useful life. |
|  |  |

**ECM 3**

|  |  |
| --- | --- |
| Existing or Baseline Equipment Description | Existing or Baseline Hours of Operation |
|  | Mon. – Fri.:Saturday:Sunday: |
| Proposed New Equipment | Proposed Hours of Operation |
|  | Mon. – Fri.:Saturday:Sunday: |
| Projected Annual Energy Savings(Specify type – kWh, MMBtu, gallons of propane, etc.) | Projected Annual Energy Cost Savings |
|  | $ |
| What is the expected useful life of the ECM (in years)? This information should be obtained from the most recent version of the Mid-Atlantic Technical Reference Manual (TRM) available at <https://neep.org/mid-atlantic-technical-reference-manual-trm-v9>. | If not listed in the Mid Atlantic TRM, please provide other supporting documentation of anticipated expected useful life. |
|  |  |

**ECM 4**

|  |  |
| --- | --- |
| Existing or Baseline Equipment Description | Existing or Baseline Hours of Operation |
|  | Mon. – Fri.:Saturday:Sunday: |
| Proposed New Equipment | Proposed Hours of Operation |
|  | Mon. – Fri.:Saturday:Sunday: |
| Projected Annual Energy Savings(Specify type – kWh, MMBtu, gallons of propane, etc.) | Projected Annual Energy Cost Savings |
|  | $ |
| What is the expected useful life of the ECM (in years)? This information should be obtained from the most recent version of the Mid-Atlantic Technical Reference Manual (TRM) available at <https://neep.org/mid-atlantic-technical-reference-manual-trm-v9>. | If not listed in the Mid Atlantic TRM, please provide other supporting documentation of anticipated expected useful life. |
|  |  |

**ECM 5**

|  |  |
| --- | --- |
| Existing or Baseline Equipment Description | Existing or Baseline Hours of Operation |
|  | Mon. – Fri.:Saturday:Sunday: |
| Proposed New Equipment | Proposed Hours of Operation |
|  | Mon. – Fri.:Saturday:Sunday: |
| Projected Annual Energy Savings(Specify type – kWh, MMBtu, gallons of propane, etc.) | Projected Annual Energy Cost Savings |
|  | $ |
| What is the expected useful life of the ECM (in years)? This information should be obtained from the most recent version of the Mid-Atlantic Technical Reference Manual (TRM) available at <https://neep.org/mid-atlantic-technical-reference-manual-trm-v9>. | If not listed in the Mid Atlantic TRM, please provide other supporting documentation of anticipated expected useful life. |
|  |  |

*If necessary, copy and add the table below as many times as necessary to capture all ECMs.*

**ECM [Enter # Here]**

|  |  |
| --- | --- |
| Existing or Baseline Equipment Description | Existing or Baseline Hours of Operation |
|  | Mon. – Fri.:Saturday:Sunday: |
| Proposed New Equipment | Proposed Hours of Operation |
|  | Mon. – Fri.:Saturday:Sunday: |
| Projected Annual Energy Savings(Specify type – kWh, MMBtu, gallons of propane, etc.) | Projected Annual Energy Cost Savings |
|  | $ |
| What is the expected useful life of the ECM (in years)? This information should be obtained from the most recent version of the Mid-Atlantic Technical Reference Manual (TRM) available at <https://neep.org/mid-atlantic-technical-reference-manual-trm-v9>. | If not listed in the Mid Atlantic TRM, please provide other supporting documentation of anticipated expected useful life. |
|  |  |

**Lawton Loan Request Amount**

Please provide below the amount of funding the applicant Agency is requesting from the Lawton Loan Program. This amount cannot exceed the total cost of the energy efficiency project (for retrofit and replacement projects) or the difference between the total cost of the proposed energy efficient equipment fixtures and the total cost of the assumed baseline equipment/fixtures (for new construction projects), and should be net of any anticipated utility rebates and other leveraged sources of funding (private donations, grants, etc.).

|  |  |
| --- | --- |
| Lawton Loan Request Amount | $ |

**Itemized List of Loan-funded Expenses**

Please provide an itemized list of all equipment, evaluations, and labor expenses that the requested Lawton Loan would fund, in whole or in part, in the table below. If a cost is an estimate, this can be noted in the line item description.

|  |  |
| --- | --- |
| Line Item  | Cost |
|  | $ |
|  | $ |
|  | $ |
|  | $ |
|  | $ |
|  | $ |
|  | $ |
| TOTAL | $ |

**Leveraged Funds**

Please list all sources of other funds leveraged for the energy efficiency project – utility rebates, grants, other loans, agency self-supplied capital, etc.

|  |  |
| --- | --- |
| Utility Rebates | $ |
| Grants/Incentives | $ |
| Other Loans | $ |
| Other (Specify): |  | $ |
| TOTAL | $ |

**Project Simple Payback**

To calculate simple payback, divide the Total Project Cost (before the deduction of any leveraged funds) by the Total Annual Energy Cost Savings. The simple payback of the combined project plus interest costs will determine the repayment schedule of the Lawton Loan. The measures in aggregate must have a simple payback of 13 years or less. The term of a zero-interest loan to a State Agency will be equal to the calculated simple payback for the project, plus one additional year to enable one full year of avoided energy savings is accrued.

|  |  |
| --- | --- |
| Total Project Cost | $ |
| Total Annual Energy Savings | $ |
| Project Simple Payback (years) |  |

**Project Timeline**

Please provide a project timeline which includes expected completion dates of specified milestones. The template below may be used, modified as necessary, or an alternative project schedule may be provided (such as a Gantt chart).

|  |  |
| --- | --- |
| Expected Project Start Date |  |
| Procurement of Materials/Equipment/Contractor(s) |  |
| Begin Installation/Construction |  |
| 25% Project Completion |  |
| 50% Project Completion |  |
| 75% Project Completion |  |
| Complete Installation/Construction |  |
| Project Commissioning |  |
| Expected Project End Date |  |

If you anticipate any risks that could affect the proposed project timeline, please detail them in the space below. Do not consider inadequate funding a risk for this purpose.

|  |
| --- |
|  |

Is this project conditional upon receiving funding from any other sources? If so, please list the funding source and the anticipated timeline for financing decisions.

|  |
| --- |
|  |

**Applicant Agency Certification and Signature**

**By signing the Lawton Loan Application Form at the bottom of this page, you are certifying the following information is true and correct to the best of your knowledge, information, and belief:**

1. The individual signing this Application Form on behalf of the applicant Agency is the Authorized Representative of the applicant Agency with legal authority to apply to the Lawton Loan Program on behalf of the applicant Agency.
2. The applicant Agency possesses the legal authority to carry out Lawton Loan Program activities and will do so in accordance with all applicable laws and regulations.
3. I understand that a person may not make or cause to be made any false statement or report in any document required to be furnished to MEA for use in any agreement relating to financial assistance.
4. A person applying for or benefiting from financial assistance under the Lawton Loan Program may not knowingly make or cause to be made any false statement or report for the purpose of influencing the action of MEA on an application or for the purpose of influencing the action of MEA affecting financial assistance already provided.
5. I understand that any person who violates these terms shall be subject to the following penalties: (1) immediate cancellation of the Lawton Loan and acceleration of the terms of financial assistance provided by the Lawton Loan Program; and (2) subject to charges and, upon conviction, subject to a fine not exceeding $50,000 or imprisonment not exceeding one (1) year or both.
6. I understand that the applicant Agency must adhere to all Lawton Loan Program Regulations, found in the Code of Maryland Regulations, Title 14, Subtitle 26, Chapter 01.

I authorize MEA to contact the utilities serving the project site designated in this Lawton Loan Program application to obtain energy use data necessary to approve and monitor any loan awarded based on this application.

**IN WITNESS WHEREOF, the individual signing this Application package has caused this document to be duly executed on this \_\_\_\_\_\_ day of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, 20\_\_\_.**

|  |  |
| --- | --- |
| **Signature of Authorized Representative** | x |
| **Printed Name of Authorized Representative** |  |
| **Title of Authorized Representative** |  |
| **Signature of Project Primary Contact \*\*** | x |
| **Printed Name of Primary Contact \*\*** |  |
| **Title of Primary Contact \*\*** |  |

\*\* For state agency projects, this could be a representative from the Maryland Department of General Services.

**State Agency Checklist**

Make sure you have completed all necessary information so that your Lawton loan can be reviewed. Failure to submit everything could delay loan review. Listed below are all the necessary pieces of information that state agencies need to submit in order to approve the application:

[ ]  [Borrowing Agency Name](#Borrower)

[ ]  [Date of Submission](#Date)

[ ]  [Mailing Address](#MailingAddress)

[ ]  [Borrowing Agency Point of Contact](#BorrowerAgencyContactName)

[ ]  [Borrowings Agency Point of Contact Title](#BorrowerAgencyTitle)

[ ]  [Borrowing Agency Phone Number](#BorrowerAgencyContactPhone)

[ ]  [Borrowing Agency Email Address](#BorrowerAgencyContactEmail)

[ ]  [Project Manager Point of Contact](#PPCName)

[ ]  [Project Manager Contact Title](#PPCTitle)

[ ]  [Project manager Phone Number](#PPCPhone)

 [ ]  [Project manager Email Address](#PPCEmail)

[ ]  [Name of Building or Complex](#NameofBuildingComplex)

[ ]  [If a complex, Total Number of Buildings](#Totalnumberofbuildings)

[ ]  [Physical Address of Project](#PhysicalAddress)

[ ]  [Describe the proposed project’s energy savings and any other benefits, such as reduced maintenance costs, increased occupancy comfort, etc.](#PhysicalAddress)

[ ]  [Amount of Loan requested](#Amountofloanrequested)

[ ]  [Does the Project utilize other funding](#Leveragedfunds)

[ ]  [Amount of other funding](#Leveragedfunds)

[ ]  [Does the loan support an EPC?](#SupportEPC)

[ ]  [If an EPC, who is the FISCAL point of contact for the borrowing agency](#SupportEPCYes)

[ ]  [Total Projected annual savings in $](#TotalprojectsavingsMoney)

[ ]  [Total Projected annual savings in kWh](#TotalProjectedkWH)

[ ]  [Total Projected annual savings in fuel. IE (Natural Gas, Propane, or Other)](#TotalprojectedFuel)

[ ]  [Projected Simple Payback](#Simplepayback)

[ ]  [Timeline](#TimeLine)

[ ]  [Primary Project Contact, Borrowing Agency Signature](#PPCSignature)

[ ]  [Primary Project Contact, Borrowing Agency Printed](#PPCDGSPrint)

[ ]  [Primary Project Contact, Borrowing Agency Title](#PPCTitle)

[ ]  [Primary Contact (DGS or equivalent) Signature](#PPCDGSSign)

[ ]  [Primary Contact (DGS or equivalent) Printed](#PPCPrinter)

[ ]  [Primary Contact (DGS or equivalent) Title](#PPCDGSTitle)

1. The expected useful life of an individual energy measures will typically be based on the most recent version of the Mid-Atlantic Technical Reference Manual (TRM) available at <https://neep.org/mid-atlantic-technical-reference-manual-trm-v9>. [↑](#footnote-ref-1)