Application-Package Checklist

Run every project against this before you submit

WHY THIS ONE MATTERS MORE THAN IT LOOKS

The single biggest cause of C-PACE delay is incomplete or sloppy contractor documentation. A complete package is everything MGB and the capital provider need to say yes without coming back to you. Paperwork quality is a competitive advantage: the contractor who submits clean packages becomes the one MGB trusts and refers, because their projects close without drama.

SCOPE OF WORK	
☐	Every measure itemized — no line reading “HVAC upgrade” or “lighting.”
☐	Equipment make and model where relevant
☐	Quantities stated
☐	Ancillary work included and identified as such — the roof under the solar, the electrical upgrade
☐	Scope matches the bid exactly, line for line
SAVINGS ESTIMATE	
☐	Credible estimate of energy and water savings for each measure
☐	Supporting basis attached — actual utility bills, equipment age and condition, run hours
☐	Estimate rigor matched to project size (see the sizing note below)
☐	Numbers are realistic, not aspirational — inflated savings get flagged in review
USEFUL LIFE	
☐	Expected useful life documented for each major measure — this sets the financing term
BID AND PRICING	
☐	Itemized
☐	Market-reasonable and defensible — the financed amount is based on your numbers
☐	Pricing reflects the actual scope, with no unpriced assumptions
PROPERTY AND OWNER INFORMATION	
☐	Property address, type, and confirmed member community (Job Aid 2)
☐	Ownership entity as it holds title
☐	Property taxes current — asked gently, confirmed before submission
☐	Existing mortgage holder identified, so consent can be sequenced early

☐	***[MGB to confirm any additional required owner or property documentation]***
YOUR OWN STANDING	
☐	Missouri trade licensing current for every trade on the scope
☐	Insurance and bonding in place at required levels
☐	MGB contractor registration active and in good standing

SIZING THE SAVINGS ESTIMATE

Rigor scales with project size: the bigger the ask, the stronger the savings documentation. ASHRAE audit levels are the standard commonly referenced, with deeper levels expected as the dollar amount climbs.

PROJECT SIZE	TYPICALLY ACCEPTABLE BASIS	NOTES
No upper limits, smaller projects limited by fee and cost efficiency	Engineering estimate or a straightforward energy audit	Utility-bill baseline plus equipment condition and run hours is usually enough at this scale.
No program limit – capital provider driven	More formal energy assessment — ASHRAE audit level as specified by the program	Expect the capital provider to read this closely. Engage the auditor early; it is the long lead item.

> The dollar thresholds and the specific ASHRAE levels expected at each tier are program determinations. The scripts state the principle but not the numbers, and a contractor acting on a guessed threshold will produce the wrong documentation.

AFTER SUBMISSION — KEEPING THE PACKAGE VALID

The package describes a specific, defined project, and the financing locks to it. Two habits protect that:

☐	**Route every material field change through the program's change-order process** before you proceed. If you open a wall and find additional work, or you want to substitute equipment, submit the change, get approval, then continue. Unapproved changes are exactly what holds up your payment.
☐	**Install to the scope that was financed,** to code, and to manufacturer specification. There is a completion verification step at the end, and your final payment runs through it.

Markets set in motion. It all starts with collaboration.