

MGB ACADEMY

C-PACE for Architects & Engineers

Project Lifecycle & Application Package

Where the design professional touches a C-PACE transaction, and what you owe at each stage

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HOW TO USE THIS DOCUMENT

A stage map and a package checklist in one document. The A/E is involved in four of the five stages; the one you are not in is the one that fails when the earlier four were done loosely.

Program forms and submission requirements are set by MCED and may change. Confirm the current package before submitting.

Stage map

Stage	What happens	A/E role	A/E deliverable
1. Origination and screening	Jurisdiction confirmed; owner interest established; preliminary scope discussed	Active	Preliminary measure list; jurisdiction question raised
2. Scope and benefit development	Measures defined; benefit projected; eligible cost basis assembled	Lead	Measure schedule; benefit projection; assumptions schedule
3. Underwriting, consent, and closing	Capital provider underwrites; lender consent obtained; assessment recorded	Supporting	Responses to technical diligence; revisions to projection
4. Construction and funding	Work installed; draws funded against progress	Not typically the A/E's role in the funding mechanics	Observation reports where in scope; payment application review
5. Completion and verification	Completion certified; assessment repayment begins	Lead	Completion certification; commissioning results where in scope

Stage 4 is the one where the A/E is least involved and where loose earlier work surfaces. A measure schedule that does not match what is being installed produces a funding problem during construction, when the cost of resolving it is highest.

Application package — A/E deliverables

The full application package is the owner's responsibility. This checklist covers only the portions ordinarily produced or sealed by the design professional.

□	Item	What good looks like
□	Measure schedule with scope narrative per measure	Legible to a non-engineer reviewer
□	Eligible cost basis, hard and soft, allocated by measure	Soft cost allocation method stated
□	Baseline definition with stated authority	Existing conditions, code, or standard — named
□	Benefit projection with assumptions schedule	See MGBA-AE-JA-07
□	Savings-to-investment ratio worksheet	See MGBA-AE-JA-05; framed as evidence
□	Useful life per measure	Reconciled to the proposed term, 20-year maximum
□	Sensitivity analysis	Driving assumptions stressed
□	Drawings and specifications for the financed scope	Current issue, dated
□	New construction: incremental cost derivation	Baseline, specified assembly, contractor-priced delta
□	Licensure and professional qualifications	Discipline scope matched to the seal
□	Reliance and limitations statement	Counsel-reviewed language
□	Seal, signature, and date	Professional of record

Completion verification — what you are certifying

The completion certification is a factual statement about installation and function as of a date, made on the basis of your observation. It is not a performance guarantee and should never read like one.

Include	Exclude
Financed measures as installed, by measure	Any projection of future savings
Dates and scope of your observation	Certification of scope you did not observe
Deviations from the financed scope, described	Silence about substitutions
Commissioning results, where commissioning was in scope	Implied commissioning that was not performed
Items relied on from others, attributed by name	Unattributed reliance
Punch status at the certification date	A clean certification over open punch items

THE SUBSTITUTION PROBLEM

Where equipment or assemblies were substituted during construction, the financed scope and the installed scope no longer match, and the benefit record no longer describes the building. Identify the deviation in the certification and state whether the

Include	Exclude
	projected benefit basis is materially affected. Do not resolve it by certifying to the original schedule.

Stage sequencing, required forms, and completion documentation requirements are set by MCED program guidelines and by the transaction documents. Confirm the current package with MCED before submission.