MISSOURI GREEN BANC

Workforce Education & Training Series

Eligible Project Cost Checklist

Beyond the equipment. Keyed to Segment 3.

MGBA-EQP-JA-03

This is the item distributors get wrong most often. The financed scope is broader than the purchase order. The ancillary line items that normally get value-engineered out of a quote sit inside the financed scope here — which is why scoping to the complete improvement rather than to the equipment generally raises attach rate.

Work this checklist when you build the quote, not after. Costs left off the scope at application are difficult to add later.

HARD COSTS

- ☐ Equipment and materials, delivered
- ☐ Installation labor
- ☐ Demolition and removal of displaced equipment
- ☐ Structural work required to support the improvement — curbs, pads, roof reinforcement
- ☐ Electrical and mechanical infrastructure required to serve the improvement
- ☐ Controls integration and network infrastructure
- ☐ Startup, balancing, and testing

SOFT COSTS

- ☐ Design and engineering
- ☐ Energy audit or engineering analysis documenting the improvement's economic benefit
- ☐ Permitting and inspection fees
- ☐ Commissioning, and measurement and verification where specified
- ☐ Program application, administration, and recording fees
- ☐ Capitalized interest during construction, where the structure provides for it
- ☐ Legal and closing costs attributable to the assessment

GENERALLY NOT ELIGIBLE

- ☐ Portable, plug-load, or moveable equipment — the affixture test
- ☐ Tenant-owned equipment that leaves with the tenant
- ☐ Routine maintenance and repair not tied to a qualifying improvement

- ☐ Costs incurred before the assessment is recorded, unless the program expressly provides for reimbursement of prior costs
- ☐ Extended service contracts and warranties beyond the customary term
- ☐ Furniture, fixtures, and equipment unrelated to the qualifying improvement

SCOPING DISCIPLINE

Quote the complete, commissioned, functioning improvement. A quote that stops at the equipment invites the owner to source the balance elsewhere or to defer it — and deferred commissioning is the most common reason a good package underperforms its projection.

Where a cost's eligibility is uncertain, list it on the scope and let program review make the call. Do not omit it and do not assert it. Omission narrows the project; assertion is a statement you are not authorized to make.

QUOTE STRUCTURE THAT TRAVELS WELL

SECTION OF THE QUOTE	WHY IT MATTERS AT PROGRAM REVIEW
Measure-by-measure line items, each priced separately	Terms are matched to the useful life of each measure. A single bundled price makes weighted-average life difficult to establish and slows review.
Useful life stated per measure, with the basis cited	Supports term-setting directly. Cite the manufacturer's published data or a recognized standard rather than an estimate.
Soft costs itemized, not buried in overhead	Itemized soft costs are financeable. Costs folded into a markup are difficult to substantiate.
Commissioning scope stated explicitly	Commissioning is an eligible cost and a common condition of completion. Naming it protects both the owner and the projection.

Markets set in motion. It all starts with collaboration.