Placement Runbook

Seven stages, who owns each, and where your attention actually matters

TRACK Loan Brokers — MGBA-LB-101
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SEGMENT 6 — Running the Placement
USE Process · one per live placement

Sixty to one hundred twenty days is typical. Everything in the sequence below is schedulable except one item — and that item is the one that moves your closing date.

THE SEQUENCE

Stage	What happens	Your role	Owner
1 · Screen and size	Preliminary eligible basis estimated from mechanical, envelope, and energy scope.	**You.** The fastest value you add — minutes, not days. Use **JA-04** and **JA-05**.	Broker
2 · Engage administrator and capital provider	Program administrator and capital provider brought in. Compensation arrangement confirmed.	**You.** Confirm your economics here, before further work. Use **JA-08**.	Broker
3 · Senior debt term sheet	C-PACE disclosed to the senior lender. Consent negotiated as a term sheet condition.	**You coordinate.** Capital provider and MGB conduct the credit conversation. Send **JA-06**. **THE CRITICAL STAGE.**	Capital provider and MGB, coordinated by you
4 · Documentation	Eligible cost allocation, energy modeling, and economic benefit documentation prepared.	You keep the calendar honest.	Sponsor and design team
5 · Underwriting	Capital provider evaluates property, sponsor, and project. Terms set.	You manage information flow.	Capital provider
6 · Closing	Assessment recorded. Senior debt and assessment closed together where possible.	You coordinate the two closings.	All parties
7 · Construction and disbursement	Draws against a defined schedule with documentation, lien waivers, and inspection.	You are largely done.	Capital provider

THREE THINGS THAT WILL SAVE YOU THE MOST TIME

Size it before you sell it

A ten-minute conversation about mechanical, envelope, and energy scope tells you whether there is enough eligible basis to bother. Do that before you position it with the sponsor.

Confirm your compensation before the term sheet

Not after underwriting, not at closing. The arrangement varies by capital provider and you need it in writing while you still have the option to walk.

Calendar the consent conversation first, not last

Everything else in the process is schedulable. Lender consent is the item that moves your closing date, so it goes at the front.

PLACEMENT CHECKLIST

✓	Item	Owner	Date
	Deal screened against the four patterns and five disqualifiers (JA-04)	Broker	
	Preliminary eligible basis completed and above threshold (JA-05)	Broker	
	Property confirmed to sit in an MCED member community	Broker / MGB	
	Senior lender's institutional position on assessments confirmed	Broker	
	Compensation arrangement confirmed in writing (JA-08)	Broker	
	Compensation disclosed in the engagement letter	Broker	
	Capital provider engaged and preliminary structure discussed	Broker	
	C-PACE disclosed to senior lender at term sheet stage	Broker	
	JA-06 briefing sheet forwarded to the credit officer	Broker	
	Credit conversation convened with capital provider and MGB	Capital provider / MGB	
	Consent written into the senior term sheet as a closing condition	Sponsor / lender	
	Eligible cost allocation prepared	Sponsor / design team	
	Energy modeling and economic benefit documentation prepared	Qualified professional	
	Program review completed and eligibility confirmed	MCED / MGB	
	Capital provider underwriting complete; terms issued	Capital provider	
	Senior Lender Consent Form executed	Senior lender	
	Assessment contract executed and notice recorded	MCED / sponsor	
	Senior loan and assessment closed	All parties	

✓	Item	Owner	Date
	Disbursement schedule and draw requirements handed to the sponsor	Capital provider	

LAST THOUGHT

Your business is knowing where capital is when it is hard to find. That is the whole proposition, and it is why sponsors call you instead of calling banks themselves.

There is a source of long-term, fixed-rate, non-recourse capital in your market, authorized by Missouri statute, administered through the Missouri Clean Energy District, available across more than three hundred member communities — and most of the brokers you compete with cannot size it, cannot sequence it, and cannot manage the lender consent.

That is not a small advantage. **Screen your pipeline this week.**