

#1

COMPLETE

Collector: Web Link 2 (Web Link)
Started: Wednesday, July 17, 2024 9:01:21 AM
Last Modified: Wednesday, July 17, 2024 9:54:40 AM
Time Spent: 00:53:18
IP Address: 158.222.139.102

Page 1

Q1

Entity Name

Energetic Insurance, Inc. d/b/a Energetic Capital

Q2

Entity City

Boston

Q3

Entity State

Massachusetts

Q4

Principal Contact Name

Nathan Maggiotto

Q5

Principal Contact Email

nathan@energeticcapital.com

Q6

Principal Contact Phone

6178046641

Q7

Website URL

<https://www.energeticcapital.com/>

Q8

Please check the boxes of all of the states and territories your organization currently operates in.

Alabama,
 Alaska,
 Arizona,
 Arkansas,
 California,
 Colorado,
 Connecticut,
 Delaware,
 District of Columbia,
 Florida,
 Georgia,
 Hawaii,
 Idaho,
 Illinois,
 Indiana,
 Iowa,
 Kansas,
 Kentucky,
 Louisiana,
 Maine,
 Maryland,
 Massachusetts,
 Michigan,
 Minnesota,
 Mississippi,
 Missouri,
 Montana,
 Nebraska,
 Nevada,
 New Hampshire,
 New Jersey,
 New Mexico,
 New York,
 North Carolina,
 North Dakota,
 Ohio.

☐ Alaska,
☐ Arizona,
☐ California,
☐ Colorado,
☐ Connecticut,
☐ Delaware,
☐ Florida,
☐ Georgia,
☐ Hawaii,
☐ Idaho,
☐ Illinois,
☐ Indiana,
☐ Iowa,
☐ Kansas,
☐ Kentucky,
☐ Louisiana,
☐ Maine,
☐ Maryland,
☐ Massachusetts,
☐ Michigan,
☐ Minnesota,
☐ Missouri,
☐ Montana,
☐ Nebraska,
☐ Nevada,
☐ New Hampshire,
☐ New Jersey,
☐ New Mexico,
☐ New York,
☐ North Carolina,
☐ North Dakota,
☐ Ohio,
☐ Oklahoma,
☐ Oregon,
☐ Pennsylvania,
☐ Rhode Island,
☐ South Carolina,
☐ South Dakota,
☐ Tennessee,
☐ Texas,
☐ Utah,
☐ Vermont,
☐ Virginia,
☐ Washington,
☐ West Virginia,
☐ Wisconsin,
☐ Wyoming

Q9

Markets served

☐ Residential (1-4 units or families),
☐ Non-residential (e.g. multifamily, commercial, public buildings)

Q10

What program design services does your organization offer? (please check all that apply)

☐ Direct lending structure - The State Energy Office uses funds to make direct loans to borrowers, or through an administrator who processes the loans on their behalf
☐ Co-lending/participation structure - The State Energy Office provides funding for a portion of the loan at reduced/zero interest for eligible loans made by one or more program participating lenders
☐ Other (please describe):
 Credit Insurance - protect energy efficiency from non-payment by customers under long-term contracts like Energy Service Agreements, Master Service Agreements, and similar. Insurance policies can define lenders (including state sponsored lenders) as Loss Payee in order to benefit from coverage. This product could also be offered by the state.

Q11

What financial and/or operational program administration services does your organization offer? (check all that apply)

Direct lending structure - The State Energy Office uses funds to make direct loans to borrowers, or through an administrator who processes the loans on their behalf

,

Co-lending/participation structure - The State Energy Office provides funding for a portion of the loan at reduced/zero interest for eligible loans made by one or more program participating lenders

,

Other (please describe):

Energetic operates as a specialty financing company with full underwriting, diligence and monitoring capabilities. We have issued credit insurance policies totaling over \$300M in notional limit of liability. This includes coverage of ~1,500 sites in 46 states, enabling \$500M in total project value. We actively monitor our portfolio for credit quality, emissions reduction and avoidance, etc. We can provide all or a portion of these services to operate or administer programs offered by the State Energy Office.

Q12

Does your organization offer participating lender marketing/recruitment, approval, training and/or support services?

Yes

Q13

Does your organization offer energy auditor marketing/recruitment, approval, training and/or support services?

No

Q14

Does your organization offer project contractor marketing/recruitment, approval, training, and/or support services?

No

Q15

Does your organization offer program marketing services?

No

Q16

Does your organization offer program website development and management services?

No

Q17

What Federal grant compliance monitoring services does your organization provide? (please check all that apply)

Other (please describe):

We do not provide these services directly, but could add them as part of our existing transaction credit monitoring process for transactions, likely in partnership with another provider.

Q18

Yes

Does your organization offer program metric collection and reporting services?

Q19

What other services besides the ones identified in this survey does your program provide, if any? Please describe. If none, please enter "N/A."

In case it is not specifically contemplated in numbers 10 & 11, we are able to design relevant lending or credit enhancement programs and provide end to end origination, underwriting, documentation, issuance and monitoring of transactions executed under those programs.

We have a proprietary underwriting portal that can rapidly screen possible project sites across several important demographic factors. The same portal includes a software based model that measures expected loss and risk adjusted return of specific transactions. We use these tools to determine the risk profile of loans and insurance policies. This tool could be used to appropriately size Loan Loss Reserves or justify rate buy downs.

We have also built tools to rapidly screen possible sites to determine whether they are located in disadvantaged communities as defined by the Justice40 initiative and the EPA's Environmental Justice maps. ~30% of our current portfolio is located in such communities.

#2

COMPLETE

Collector: Web Link 2 (Web Link)
Started: Wednesday, July 17, 2024 10:47:49 PM
Last Modified: Wednesday, July 17, 2024 10:58:09 PM
Time Spent: 00:10:19
IP Address: 73.245.145.36

Page 1

Q1

Entity Name

Infranergy

Q2

Entity City

Wellington

Q3

Entity State

FL

Q4

Principal Contact Name

Dr. Uche Isiugo

Q5

Principal Contact Email

Uche@infranergy.us

Q6

Principal Contact Phone

718-844-0719

Q7

Website URL

www.infranergy.us

Q8

Please check the boxes of all of the states and territories your organization currently operates in.

Alabama,
Alaska,
California,
Colorado,
Connecticut,
Delaware,
District of Columbia,
Florida,
Georgia,
Guam,
Hawaii,
Illinois,
Louisiana,
Maryland,
Massachusetts,
Michigan,
New Jersey,
New Mexico,
New York,
North Carolina,
Pennsylvania,
Puerto Rico,
Texas

Q9

Markets served

Residential (1-4 units or families),
Non-residential (e.g. multifamily, commercial, public buildings)

Q10

What program design services does your organization offer? (please check all that apply)

Direct lending structure - The State Energy Office uses funds to make direct loans to borrowers, or through an administrator who processes the loans on their behalf

,

Co-lending/participation structure - The State Energy Office provides funding for a portion of the loan at reduced/zero interest for eligible loans made by one or more program participating lenders

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Interest rate buydowns - The State Energy Office uses funds to reduce the interest rate on eligible loans made by one or more program participating lenders

,

Loan loss reserves - The State Energy Office uses funds to provide a loan loss reserve on eligible loans made by one or more program participating lenders to be drawn on in the event of loan defaults

Q11

What financial and/or operational program administration services does your organization offer? (check all that apply)

Direct lending structure - The State Energy Office uses funds to make direct loans to borrowers, or through an administrator who processes the loans on their behalf

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Co-lending/participation structure - The State Energy Office provides funding for a portion of the loan at reduced/zero interest for eligible loans made by one or more program participating lenders

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Interest rate buydowns - The State Energy Office uses funds to reduce the interest rate on eligible loans made by one or more program participating lenders

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Loan loss reserves - The State Energy Office uses funds to provide a loan loss reserve on eligible loans made by one or more program participating lenders to be drawn on in the event of loan defaults

Q12

Does your organization offer participating lender marketing/recruitment, approval, training and/or support services?

Yes

Q13

No

Does your organization offer energy auditor marketing/recruitment, approval, training and/or support services?

Q14

Yes

Does your organization offer project contractor marketing/recruitment, approval, training, and/or support services?

Q15

Yes

Does your organization offer program marketing services?

Q16

Yes

Does your organization offer program website development and management services?

Q17

**Davis Bacon Act compliance using LCPtracker,
Build America, Buy America Act compliance,
National Environmental Policy Act compliance**

What Federal grant compliance monitoring services does your organization provide? (please check all that apply)

Q18

Yes

Does your organization offer program metric collection and reporting services?

Q19

What other services besides the ones identified in this survey does your program provide, if any? Please describe. If none, please enter "N/A."

Software for overall project and program management for State Energy Offices and stakeholders, data reporting and compliance.

#3

COMPLETE

Collector: Web Link 2 (Web Link)
Started: Friday, July 19, 2024 9:27:59 AM
Last Modified: Friday, July 19, 2024 9:49:27 AM
Time Spent: 00:21:27
IP Address: 23.87.151.132

Page 1

Q1

Entity Name

Concord Servicing LLC

Q2

Entity City

Scottsdale

Q3

Entity State

Arizona

Q4

Principal Contact Name

Tom Myers

Q5

Principal Contact Email

tmyers@concordservicing.com

Q6

Principal Contact Phone

608-214-7653

Q7

Website URL

www.concordservicing.com

Q8

Please check the boxes of all of the states and territories your organization currently operates in.

Alabama,
 Alaska,
 American Samoa,
 Arizona,
 Arkansas,
 California,
 Colorado,
 Connecticut,
 Delaware,
 District of Columbia,
 Florida,
 Georgia,
 Guam,
 Hawaii,
 Idaho,
 Illinois,
 Indiana,
 Iowa,
 Kansas,
 Kentucky,
 Louisiana,
 Maine,
 Maryland,
 Massachusetts,
 Michigan,
 Minnesota,
 Mississippi,
 Missouri,
 Montana,
 Nebraska,
 Nevada,
 New Hampshire,
 New Jersey,
 New Mexico,
 New York,
 North Carolina.

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North Dakota,
Northern Marianas,
Ohio,
Oklahoma,
Oregon,
Pennsylvania,
Puerto Rico,
Rhode Island,
South Carolina,
South Dakota,
Tennessee,
Texas,
Utah,
Vermont,
Virgin Islands,
Virginia,
Washington,
West Virginia,
Wisconsin,
Wyoming

Q9

Markets served

Residential (1-4 units or families),
Non-residential (e.g. multifamily, commercial, public buildings)

Q10

What program design services does your organization offer? (please check all that apply)

Other (please describe):
Loan & Lease & PPA portfolio management. Financial Services

Q11

What financial and/or operational program administration services does your organization offer? (check all that apply)

Direct lending structure - The State Energy Office uses funds to make direct loans to borrowers, or through an administrator who processes the loans on their behalf

,

Co-lending/participation structure - The State Energy Office provides funding for a portion of the loan at reduced/zero interest for eligible loans made by one or more program participating lenders

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Interest rate buydowns - The State Energy Office uses funds to reduce the interest rate on eligible loans made by one or more program participating lenders

,

Loan loss reserves - The State Energy Office uses funds to provide a loan loss reserve on eligible loans made by one or more program participating lenders to be drawn on in the event of loan defaults

,

Other (please describe):

Loan & Lease & PPA portfolio management. Financial Services

Q12

Does your organization offer participating lender marketing/recruitment, approval, training and/or support services?

No

Q13

Does your organization offer energy auditor marketing/recruitment, approval, training and/or support services?

No

Q14

Does your organization offer project contractor marketing/recruitment, approval, training, and/or support services?

No

Q15

Does your organization offer program marketing services?

No

Q16

No

Does your organization offer program website development and management services?

Q17

Other (please describe):

What Federal grant compliance monitoring services does your organization provide? (please check all that apply)

n/a

Q18

Yes

Does your organization offer program metric collection and reporting services?

Q19

What other services besides the ones identified in this survey does your program provide, if any? Please describe. If none, please enter "N/A."

Financial Services, customer service, early and late-stage collections, buy downs, tax credits, direct & on-bill financing, green bank, loan loss reserve, physical & electronic custodial, UCC filing, contingency fee collection.

#4

COMPLETE

Collector: Web Link 2 (Web Link)
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Last Modified: Monday, July 22, 2024 11:09:15 AM
Time Spent: 00:18:08
IP Address: 99.126.180.22

Page 1

Q1

Entity Name

QstN, LLC.

Q2

Entity City

Des Moines

Q3

Entity State

Iowa

Q4

Principal Contact Name

Sam Mueller

Q5

Principal Contact Email

smueller@q-dsm.com

Q6

Principal Contact Phone

(608)334-9253

Q7

Website URL

<https://www.q-dsm.com>

Q8

Please check the boxes of all of the states and territories your organization currently operates in.

Colorado,

Illinois,

Indiana,

Iowa,

Kansas,

Michigan,

Minnesota,

Missouri,

Montana,

Wisconsin

Q9

Markets served

Residential (1-4 units or families),

Non-residential (e.g. multifamily, commercial, public buildings)

Q10

What program design services does your organization offer? (please check all that apply)

Direct lending structure - The State Energy Office uses funds to make direct loans to borrowers, or through an administrator who processes the loans on their behalf

,

Co-lending/participation structure - The State Energy Office provides funding for a portion of the loan at reduced/zero interest for eligible loans made by one or more program participating lenders

,

Interest rate buydowns - The State Energy Office uses funds to reduce the interest rate on eligible loans made by one or more program participating lenders

,

Loan loss reserves - The State Energy Office uses funds to provide a loan loss reserve on eligible loans made by one or more program participating lenders to be drawn on in the event of loan defaults

Q11

What financial and/or operational program administration services does your organization offer? (check all that apply)

Other (please describe):

N/A

Q12

Does your organization offer participating lender marketing/recruitment, approval, training and/or support services?

Yes

Q13

Does your organization offer energy auditor marketing/recruitment, approval, training and/or support services?

Yes

Q14

Does your organization offer project contractor marketing/recruitment, approval, training, and/or support services?

Yes

Q15

Does your organization offer program marketing services?

Yes

Q16

Does your organization offer program website development and management services?

No

Q17

What Federal grant compliance monitoring services does your organization provide? (please check all that apply)

Other (please describe):

N/A

Q18

Does your organization offer program metric collection and reporting services?

Yes

Q19

What other services besides the ones identified in this survey does your program provide, if any? Please describe. If none, please enter "N/A."

Technical services including design, engineering, energy auditing and assessments

#5

COMPLETE

Collector: Web Link 2 (Web Link)
Started: Monday, July 29, 2024 1:32:13 PM
Last Modified: Monday, July 29, 2024 1:39:02 PM
Time Spent: 00:06:48
IP Address: 69.119.149.89

Page 1

Q1

Entity Name

Sustainable Capital Advisors LLC

Q2

Entity City

Washington

Q3

Entity State

DC

Q4

Principal Contact Name

Jerome Cox

Q5

Principal Contact Email

coxj@sustainablecap.com

Q6

Principal Contact Phone

(917) 868-4938

Q7

Website URL

www.sustainablecap.com

Q8

Please check the boxes of all of the states and territories your organization currently operates in.

California,
District of Columbia,
Georgia,
Illinois,
Louisiana,
Maryland,
Michigan,
New York,
North Carolina,
Ohio,
Pennsylvania,
Texas,
Virgin Islands,
Virginia

Q9

Markets served

Residential (1-4 units or families),
Non-residential (e.g. multifamily, commercial, public buildings)
,
 Other (please describe):
 The states identified above represent where Sustainable Capital Advisors (SCA) has had or currently has clients. However, SCA can work with clients nationwide.

Q10

What program design services does your organization offer? (please check all that apply)

Direct lending structure - The State Energy Office uses funds to make direct loans to borrowers, or through an administrator who processes the loans on their behalf

,

Co-lending/participation structure - The State Energy Office provides funding for a portion of the loan at reduced/zero interest for eligible loans made by one or more program participating lenders

,

Interest rate buydowns - The State Energy Office uses funds to reduce the interest rate on eligible loans made by one or more program participating lenders

,

Loan loss reserves - The State Energy Office uses funds to provide a loan loss reserve on eligible loans made by one or more program participating lenders to be drawn on in the event of loan defaults

,

Other (please describe):

Evaluating and analyzing federal funding in conjunction with other loans and bonds.

Q11

What financial and/or operational program administration services does your organization offer? (check all that apply)

Direct lending structure - The State Energy Office uses funds to make direct loans to borrowers, or through an administrator who processes the loans on their behalf

,

Co-lending/participation structure - The State Energy Office provides funding for a portion of the loan at reduced/zero interest for eligible loans made by one or more program participating lenders

,

Interest rate buydowns - The State Energy Office uses funds to reduce the interest rate on eligible loans made by one or more program participating lenders

,

Loan loss reserves - The State Energy Office uses funds to provide a loan loss reserve on eligible loans made by one or more program participating lenders to be drawn on in the event of loan defaults

,

Other (please describe):

Evaluating and analyzing federal funding in conjunction with other loans and bonds.

Q12

Yes

Does your organization offer participating lender marketing/recruitment, approval, training and/or support services?

Q13

No

Does your organization offer energy auditor marketing/recruitment, approval, training and/or support services?

Q14

No

Does your organization offer project contractor marketing/recruitment, approval, training, and/or support services?

Q15

No

Does your organization offer program marketing services?

Q16

No

Does your organization offer program website development and management services?

Q17

Other (please describe):

What Federal grant compliance monitoring services does your organization provide? (please check all that apply)

None

Q18

No

Does your organization offer program metric collection and reporting services?

Q19

What other services besides the ones identified in this survey does your program provide, if any? Please describe. If none, please enter "N/A."

SCA is also a registered municipal advisory firm. This helps with state and local governments as they consider ways to combine or supplement federal funding with municipal bonds and other funding.

#6

COMPLETE

Collector: Web Link 2 (Web Link)
Started: Monday, July 29, 2024 6:09:11 PM
Last Modified: Monday, July 29, 2024 6:14:49 PM
Time Spent: 00:05:37
IP Address: 198.90.127.97

Page 1

Q1

Entity Name

National Energy Improvement Fund (NEIF)

Q2

Entity City

Allentown, PA and Denver, CO

Q3

Entity State

Pennsylvania and Colorado

Q4

Principal Contact Name

Matthew H. Brown

Q5

Principal Contact Email

mbrown@neifund.org

Q6

Principal Contact Phone

7202468847

Q7

Website URL

www.neifund.org

Q8

Please check the boxes of all of the states and territories your organization currently operates in.

Alabama,
Alaska,
Arizona,
Arkansas,
California,
Colorado,
Connecticut,
Delaware,
District of Columbia,
Florida,
Georgia,
Hawaii,
Idaho,
Illinois,
Indiana,
Iowa,
Kansas,
Kentucky,
Louisiana,
Maine,
Maryland,
Massachusetts,
Michigan,
Minnesota,
Mississippi,
Missouri,
Montana,
Nebraska,
Nevada,
New Hampshire,
New Jersey,
New Mexico,
New York,
North Carolina,
North Dakota,
Ohio.

-----,

Oklahoma,

Oregon,

Pennsylvania,

Puerto Rico,

Rhode Island,

South Carolina,

South Dakota,

Tennessee,

Texas,

Utah,

Vermont,

Virginia,

Washington,

West Virginia,

Wisconsin,

Wyoming

Q9

Markets served

Residential (1-4 units or families),

Non-residential (e.g. multifamily, commercial, public buildings)

,

Other (please describe):

Government facilities

Q10

What program design services does your organization offer? (please check all that apply)

Direct lending structure - The State Energy Office uses funds to make direct loans to borrowers, or through an administrator who processes the loans on their behalf

,

Co-lending/participation structure - The State Energy Office provides funding for a portion of the loan at reduced/zero interest for eligible loans made by one or more program participating lenders

,

Interest rate buydowns - The State Energy Office uses funds to reduce the interest rate on eligible loans made by one or more program participating lenders

,

Loan loss reserves - The State Energy Office uses funds to provide a loan loss reserve on eligible loans made by one or more program participating lenders to be drawn on in the event of loan defaults

,

Other (please describe):

Co-lending, subordinated structure (SEO provides funds as in Co-lending, but funds are provided on a subordinated basis, absorbing first losses)

Q11

What financial and/or operational program administration services does your organization offer? (check all that apply)

Direct lending structure - The State Energy Office uses funds to make direct loans to borrowers, or through an administrator who processes the loans on their behalf

,

Co-lending/participation structure - The State Energy Office provides funding for a portion of the loan at reduced/zero interest for eligible loans made by one or more program participating lenders

,

Interest rate buydowns - The State Energy Office uses funds to reduce the interest rate on eligible loans made by one or more program participating lenders

,

Loan loss reserves - The State Energy Office uses funds to provide a loan loss reserve on eligible loans made by one or more program participating lenders to be drawn on in the event of loan defaults

,

Other (please describe):

Co-lending, subordinated structure (SEO provides funds as in Co-lending, but funds are provided on a subordinated basis, absorbing first losses)

Q12

Does your organization offer participating lender marketing/recruitment, approval, training and/or support services?

Yes

Q13

Does your organization offer energy auditor marketing/recruitment, approval, training and/or support services?

No

Q14

Does your organization offer project contractor marketing/recruitment, approval, training, and/or support services?

Yes

Q15

Does your organization offer program marketing services?

Yes

Q16

Yes

Does your organization offer program website development and management services?

Q17

**Davis Bacon Act compliance using LCPtracker,
National Historic Preservation Act compliance**

What Federal grant compliance monitoring services does your organization provide? (please check all that apply)

Q18

Yes

Does your organization offer program metric collection and reporting services?

Q19

What other services besides the ones identified in this survey does your program provide, if any? Please describe. If none, please enter "N/A."

We provide on-line loan application, monthly payment and project tracking services to automate the full state RLF process.

#7

COMPLETE

Collector: Web Link 2 (Web Link)
Started: Sunday, September 01, 2024 5:48:55 PM
Last Modified: Sunday, September 01, 2024 5:52:48 PM
Time Spent: 00:03:52
IP Address: 74.71.130.88

Page 1

Q1

Entity Name

Energy Infrastructure Partners

Q2

Entity City

Brooklyn

Q3

Entity State

New York

Q4

Principal Contact Name

Renwick Paige

Q5

Principal Contact Email

renwick.paige@energyinfrapartners.com

Q6

Principal Contact Phone

6464172390

Q7

Website URL

www.energyinfrapartners.com

Q8

Please check the boxes of all of the states and territories your organization currently operates in.

California,
Colorado,
Connecticut,
Delaware,
District of Columbia,
Illinois,
Massachusetts,
Michigan,
New Jersey,
New York,
Oregon,
Pennsylvania,
Washington

Q9

Markets served

Non-residential (e.g. multifamily, commercial, public buildings)

Q10

What program design services does your organization offer? (please check all that apply)

Direct lending structure - The State Energy Office uses funds to make direct loans to borrowers, or through an administrator who processes the loans on their behalf

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Co-lending/participation structure - The State Energy Office provides funding for a portion of the loan at reduced/zero interest for eligible loans made by one or more program participating lenders

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Interest rate buydowns - The State Energy Office uses funds to reduce the interest rate on eligible loans made by one or more program participating lenders

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Loan loss reserves - The State Energy Office uses funds to provide a loan loss reserve on eligible loans made by one or more program participating lenders to be drawn on in the event of loan defaults

Q11

What financial and/or operational program administration services does your organization offer? (check all that apply)

Direct lending structure - The State Energy Office uses funds to make direct loans to borrowers, or through an administrator who processes the loans on their behalf

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Co-lending/participation structure - The State Energy Office provides funding for a portion of the loan at reduced/zero interest for eligible loans made by one or more program participating lenders

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Interest rate buydowns - The State Energy Office uses funds to reduce the interest rate on eligible loans made by one or more program participating lenders

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Loan loss reserves - The State Energy Office uses funds to provide a loan loss reserve on eligible loans made by one or more program participating lenders to be drawn on in the event of loan defaults

Q12

Does your organization offer participating lender marketing/recruitment, approval, training and/or support services?

No

Q13

Does your organization offer energy auditor marketing/recruitment, approval, training and/or support services?

Yes

Q14

Does your organization offer project contractor marketing/recruitment, approval, training, and/or support services?

Yes

Q15

Does your organization offer program marketing services?

Yes

Q16

Does your organization offer program website development and management services?

No

Q17	Davis Bacon Act compliance using LCPtracker,
What Federal grant compliance monitoring services does your organization provide? (please check all that apply)	Build America, Buy America Act compliance

Q18	Yes
Does your organization offer program metric collection and reporting services?	

Q19

What other services besides the ones identified in this survey does your program provide, if any? Please describe. If none, please enter "N/A."

Energy audits

#8

COMPLETE

Collector: Web Link 2 (Web Link)
Started: Monday, October 14, 2024 4:54:13 PM
Last Modified: Monday, October 14, 2024 5:18:59 PM
Time Spent: 00:24:46
IP Address: 99.47.122.36

Page 1

Q1

Entity Name

Aptim Federal Services, LLC

Q2

Entity City

Baton Rouge

Q3

Entity State

LA

Q4

Principal Contact Name

George Cornwell

Q5

Principal Contact Email

George.Cornwell@aptim.com

Q6

Principal Contact Phone

(508) 570-1919

Q7

Website URL

www.aptim.com

Q8

Please check the boxes of all of the states and territories your organization currently operates in.

Alabama,
Alaska,
American Samoa,
Arizona,
Arkansas,
California,
Colorado,
Connecticut,
Delaware,
District of Columbia,
Florida,
Georgia,
Guam,
Hawaii,
Idaho,
Illinois,
Indiana,
Iowa,
Kansas,
Kentucky,
Louisiana,
Maine,
Maryland,
Massachusetts,
Michigan,
Minnesota,
Mississippi,
Missouri,
Montana,
Nebraska,
Nevada,
New Hampshire,
New Jersey,
New Mexico,
New York,
North Carolina.

.....

North Dakota,
 Northern Marianas,
 Ohio,
 Oklahoma,
 Oregon,
 Pennsylvania,
 Puerto Rico,
 Rhode Island,
 South Carolina,
 South Dakota,
 Tennessee,
 Texas,
 Utah,
 Vermont,
 Virgin Islands,
 Virginia,
 Washington,
 West Virginia,
 Wisconsin,
 Wyoming

Q9

Markets served

Residential (1-4 units or families),
 Non-residential (e.g. multifamily, commercial, public
 buildings)

Q10

What program design services does your organization offer? (please check all that apply)

Direct lending structure - The State Energy Office uses funds to make direct loans to borrowers, or through an administrator who processes the loans on their behalf

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Co-lending/participation structure - The State Energy Office provides funding for a portion of the loan at reduced/zero interest for eligible loans made by one or more program participating lenders

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Interest rate buydowns - The State Energy Office uses funds to reduce the interest rate on eligible loans made by one or more program participating lenders

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Loan loss reserves - The State Energy Office uses funds to provide a loan loss reserve on eligible loans made by one or more program participating lenders to be drawn on in the event of loan defaults

Q11

What financial and/or operational program administration services does your organization offer? (check all that apply)

Direct lending structure - The State Energy Office uses funds to make direct loans to borrowers, or through an administrator who processes the loans on their behalf

,

Co-lending/participation structure - The State Energy Office provides funding for a portion of the loan at reduced/zero interest for eligible loans made by one or more program participating lenders

,

Interest rate buydowns - The State Energy Office uses funds to reduce the interest rate on eligible loans made by one or more program participating lenders

,

Loan loss reserves - The State Energy Office uses funds to provide a loan loss reserve on eligible loans made by one or more program participating lenders to be drawn on in the event of loan defaults

Q12

Does your organization offer participating lender marketing/recruitment, approval, training and/or support services?

Yes

Q13

Yes

Does your organization offer energy auditor marketing/recruitment, approval, training and/or support services?

Q14

Yes

Does your organization offer project contractor marketing/recruitment, approval, training, and/or support services?

Q15

Yes

Does your organization offer program marketing services?

Q16

Yes

Does your organization offer program website development and management services?

Q17

What Federal grant compliance monitoring services does your organization provide? (please check all that apply)

**Davis Bacon Act compliance using LCPtracker,
Build America, Buy America Act compliance,
National Environmental Policy Act compliance,
National Historic Preservation Act compliance**

Q18

Yes

Does your organization offer program metric collection and reporting services?

Q19

What other services besides the ones identified in this survey does your program provide, if any? Please describe. If none, please enter "N/A."

Program design and implementation

#9

COMPLETE

Collector: Web Link 2 (Web Link)
Started: Monday, October 28, 2024 12:49:55 PM
Last Modified: Monday, October 28, 2024 2:13:50 PM
Time Spent: 01:23:54
IP Address: 68.82.209.122

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Q1

Entity Name

Earth Advantage

Q2

Entity City

Portland

Q3

Entity State

Oregon

Q4

Principal Contact Name

Madeline Salzman

Q5

Principal Contact Email

msalzman@earthadvantage.org

Q6

Principal Contact Phone

503.968.7160 x205

Q7

Website URL

www.earthadvantage.org

Q8

Please check the boxes of all of the states and territories your organization currently operates in.

California,
Colorado,
Connecticut,
District of Columbia,
Maine,
Missouri,
Montana,
New York,
Oregon,
South Carolina,
Washington

Q9

Markets served

Residential (1-4 units or families)

Q10

What program design services does your organization offer? (please check all that apply)

Co-lending/participation structure - The State Energy Office provides funding for a portion of the loan at reduced/zero interest for eligible loans made by one or more program participating lenders
,
Interest rate buydowns - The State Energy Office uses funds to reduce the interest rate on eligible loans made by one or more program participating lenders
,
Loan loss reserves - The State Energy Office uses funds to provide a loan loss reserve on eligible loans made by one or more program participating lenders to be drawn on in the event of loan defaults
,
Other (please describe):
We help program implementers determine which of these strategies will be most aligned with achieving market transformation goals.

Q11

What financial and/or operational program administration services does your organization offer? (check all that apply)

Other (please describe):

Given that the RLF requires delivery of "Home Energy Score (or equivalent)," we offer services for Home Energy Score Assessor Training, quality assurance, labeling, and remote service providership as recognized by DOE for Home Energy Score delivery.

Q12

Does your organization offer participating lender marketing/recruitment, approval, training and/or support services?

Yes

Q13

Does your organization offer energy auditor marketing/recruitment, approval, training and/or support services?

Yes

Q14

Does your organization offer project contractor marketing/recruitment, approval, training, and/or support services?

Yes

Q15

Does your organization offer program marketing services?

No

Q16

Does your organization offer program website development and management services?

Yes

Q17

What Federal grant compliance monitoring services does your organization provide? (please check all that apply)

Other (please describe):

Home Energy Score program compliance monitoring

Q18

Does your organization offer program metric collection and reporting services?

Yes

Q19

What other services besides the ones identified in this survey does your program provide, if any? Please describe. If none, please enter "N/A."

Home Energy Score remote service provider, quality assurance provider, and web-API connected program implementer.

In addition, we currently provide:

- Market Transformation Plan consulting and services
 - Energy auditor, contractor, and real estate professional training services
 - Data aggregation, transparency, and market integration
-

#10

COMPLETE

Collector: Web Link 2 (Web Link)
Started: Friday, November 08, 2024 10:57:24 AM
Last Modified: Friday, November 08, 2024 11:10:56 AM
Time Spent: 00:13:31
IP Address: 174.169.212.207

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Q1

Entity Name

CK Financing

Q2

Entity City

Whiting

Q3

Entity State

Vermont

Q4

Principal Contact Name

Chris Kramer

Q5

Principal Contact Email

ckramer@ckfinancing.com

Q6

Principal Contact Phone

(202) 351-9154

Q7

Website URL

ckfinancing.com

Q8

Please check the boxes of all of the states and territories your organization currently operates in.

California,
Illinois,
Massachusetts,
Vermont

Q9

Markets served

Residential (1-4 units or families),
Non-residential (e.g. multifamily, commercial, public buildings),
,
Other (please describe):
EVs, community solar

Q10

What program design services does your organization offer? (please check all that apply)

Direct lending structure - The State Energy Office uses funds to make direct loans to borrowers, or through an administrator who processes the loans on their behalf
,
Co-lending/participation structure - The State Energy Office provides funding for a portion of the loan at reduced/zero interest for eligible loans made by one or more program participating lenders
,
Interest rate buydowns - The State Energy Office uses funds to reduce the interest rate on eligible loans made by one or more program participating lenders
,
Loan loss reserves - The State Energy Office uses funds to provide a loan loss reserve on eligible loans made by one or more program participating lenders to be drawn on in the event of loan defaults
,
Other (please describe):
All structures (e.g., guarantees, debt service reserve funds, etc.)

Q11

What financial and/or operational program administration services does your organization offer? (check all that apply)

Other (please describe):

Management, oversight, and evaluation

Q12

Does your organization offer participating lender marketing/recruitment, approval, training and/or support services?

Yes

Q13

Does your organization offer energy auditor marketing/recruitment, approval, training and/or support services?

No

Q14

Does your organization offer project contractor marketing/recruitment, approval, training, and/or support services?

Yes

Q15

Does your organization offer program marketing services?

Yes

Q16

Does your organization offer program website development and management services?

No

Q17

What Federal grant compliance monitoring services does your organization provide? (please check all that apply)

Other (please describe):

N/A

Q18

Does your organization offer program metric collection and reporting services?

Yes

Q19

What other services besides the ones identified in this survey does your program provide, if any? Please describe. If none, please enter "N/A."

All forms for financial program design, lender and stakeholder engagement, structuring, management, and evaluation.