

Better Buildings Challenge
Financial Ally Reporting
Product Description - Both Portfolio and Project Investments

Background: DOE would like to provide semi-annual updates on the success of Better Buildings Challenge F investment product that you offer. The information may be published on the program website.

Financial Ally Name

	Product A
Product or Investment Designation <i>(replace placeholder)</i>	Product A
Date of Submission to Better Buildings Challenge	<input type="text"/>

General Description *Please describe the financial product or*

Target Market / Description of Customers / Building Owners *What sort of asset owners is the produ*

Target Market / Description of Customers / Investors *What sort of investors is the product o*

Barriers Overcome and Means *Describe the market barriers that this p*

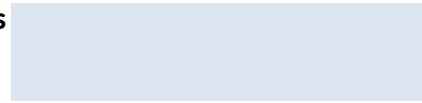
Value Proposition to Asset Owners *What are the benefits to building owne*

Value Proposition to Investors *What are the benefits to investors, and*

Risk Management *Describe any elements that provide ad*

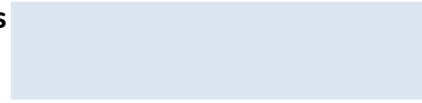
Describe who receives the value of ene

Method of Assigning the Value of Energy Savings

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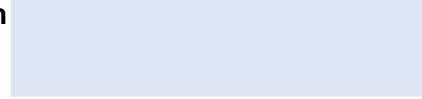
Describe the method used for calculati

Method of Calculating Energy Savings

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Describe the period for which the prod

Term

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Public reporting burden for this collection of information is estimated to average 15 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering the data, reviewing the collection of information, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Office of the Chief Information Officer, Paperwork Project, Washington, DC 20503.

In furtherance of the objectives of the Better Business Bureau Freedom of Information Act (FOIA), 5 U.S.C. § 552, this information is being made available to the public. It is not intended to affect the agency's internal commercial interests or to affect the agency's ability to carry out its functions.

Financial Allies to fund energy efficiency projects. Please complete a column of this form for each

Product B	Product C	Product D
Product B	Product C	Product D

Investment fund.

--	--	--

Product or fund aimed to serve?

--	--	--

Product or fund aimed to serve?

--	--	--

Product or fund is designed to overcome, and the innovation it utilizes

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Risks, and how are they accrued?

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How are they accrued?

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Additional security to investors and stakeholders, including collateral, nature of repayment method, debt service reserve

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Energy savings, how it is calculated, whether values are assumptions, projections, or actuals, whether there are guarant

--	--	--

ng energy savings that you will use to report estimated projected energy savings to DOE (minimums set forth in cont

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uct agreement is in effect, with any pertinent conditions or other bounds

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ormation is estimated to average 30 minutes per response, including the time for reviewing instructions, searching existing data sources, gatherin
rformation Officer, Records Management Division, IM-23, Paperwork Reduction Project (1910-5141), U.S. Department of Energy, 1000 Independe

ildings Challenge, the Department of Energy (DOE) intends to publicly post information submitted in response to this template on the Better Buil
2, and DOE's implementing regulations at 10 CFR 1004. Participation in the Better Buildings Challenge is voluntary. Do not include any personal o
ibility to obtain information in the future. This statement serves as your written notice that DOE intends to publicly post this information. By subm



Extend the table to additional Products as required

Product E	Product F	Product G
Product E	Product F	Product G

es, insurance, etc.

--	--	--

ees, shared savings, or insurance,and the structure of payments, as applicable

--	--	--

racts, engineering estimates, specific assumptions of savings per square foot, etc.)

--	--	--

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ing and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate
ence Ave SW, Washington, DC, 20585-1290; and to the Office of Management and Budget (OMB), OIRA, Paperwork Reduction Project (1910-514:

dings Challenge website. Information submitted to DOE will be handled in accordance with all applicable federal laws, rules, or regulations, includ
r confidential commercial and financial information in response to this template. Commercial and financial information is considered to be confid
itting information in response to this template, you are certifying that this information does not contain confidential commercial or financial infor

or any other aspect of this collection of information, including suggestions
1), Washington, DC 20503.

ing but not limited to the Trade Secrets Act, 18 U.S.C. §1905, and the
ential when its release would be likely either to harm the submitter's
rmation.

Better Buildings Challenge
 Financial Ally Reporting
 Periodic Update for Completed Transactions
 Individual Project Investments

OMB 1910-5141
 Expiration date: 8/31/2015

Background: DOE would like to provide semi-annual updates on the success of Better Buildings Challenge Financial Allies to fund energy efficiency projects. Please complete a copy of this form for each reporting period. The information provided will be published on the program website.

Financial Ally Name		Reporting Period Start Date	Reporting Period End Date	Form Submission Date	Building Description					Financial Aspects					Total Project Cost	Projected Annual Energy Savings		
Select a unique identifier for each project or transaction		Select from the Products already designated in "Product Descriptions" tab	Select the number of buildings in the project. If 5 or fewer, please provide details on each. If More Than 5, aggregate all buildings into a single line (Building 1)		Number of Buildings (per line)	Street Address	State	Zip Code	Building Owner Name	Primary Use	Square Feet	Funds Invested through Financial Ally	Building Owner Capital Employed	Incentives / Subsidies Captured	Other Sources of Financing	Total Project Cost is the sum of the preceding cells.	Cost Savings (\$'s)	kWh Savings
					Building 1 (or aggregation of all buildings if greater than 5)											\$ -		
					Building 2											\$ -		
					Building 3											\$ -		
					Building 4											\$ -		
					Building 5											\$ -		
					Building 1 (or aggregation of all buildings if greater than 5)											\$ -		
					Building 2											\$ -		
					Building 3											\$ -		
					Building 4											\$ -		
					Building 5											\$ -		
					Building 1 (or aggregation of all buildings if greater than 5)											\$ -		
					Building 2											\$ -		
					Building 3											\$ -		
					Building 4											\$ -		
					Building 5											\$ -		
					Building 1 (or aggregation of all buildings if greater than 5)											\$ -		
					Building 2											\$ -		
					Building 3											\$ -		
					Building 4											\$ -		
					Building 5											\$ -		
					Building 1 (or aggregation of all buildings if greater than 5)											\$ -		
					Building 2											\$ -		
					Building 3											\$ -		
					Building 4											\$ -		
					Building 5											\$ -		
					Building 1 (or aggregation of all buildings if greater than 5)											\$ -		
					Building 2											\$ -		
					Building 3											\$ -		
					Building 4											\$ -		
					Building 5											\$ -		
					Building 1 (or aggregation of all buildings if greater than 5)											\$ -		
					Building 2											\$ -		
					Building 3											\$ -		
					Building 4											\$ -		
					Building 5											\$ -		
					Building 1 (or aggregation of all buildings if greater than 5)											\$ -		
					Building 2											\$ -		
					Building 3											\$ -		
					Building 4											\$ -		
					Building 5											\$ -		
					Building 1 (or aggregation of all buildings if greater than 5)											\$ -		
					Building 2											\$ -		
					Building 3											\$ -		
					Building 4											\$ -		
					Building 5											\$ -		

Background: DOE would like to provide semi-annual updates on the success of Better Buildings Challenge Financial Allies to fund energy efficiency projects. Please complete a copy of this form for each reporting period. The information provided will be published on the program website.

Financial Ally Name		Please attempt to describe where the funds are to be invested. If the funds are to be invested across more than 5 states, select "More than 5 States" and aggregate data in the line for State 1. If 3 or fewer states, select "3 or Fewer States", and provide details broken out by each state.	State	Number of Buildings (estimate if unknown)	Approximate percentage of Funds by State	Building Owner (if identifiable)	Primary Use	Average Square Feet per Building	Total Square Feet, All Buildings	Financial Aspects					Projected Annual Energy Savings		Energy Conservation Measures				
Reporting Period Start Date	Reporting Period End Date									Form Submission Date	Product Type	Funds Invested through Financial Ally	Building Owner Capital Employed	Incentives / Subsidies Captured	Other Sources of Financing	Description of Other Sources of Funding	Total Project Cost	Dollars	kWh	Heating, Ventilation, Air-Conditioning (HVAC)	
Calculation = Sum of All Funds, Owner Funds, Incentives and Other																					
Specific Investment / Project Identifier (replace placeholder below)	Product Type									Total Number of States in which Funds will be Invested											
Investment 1		State 1 (or complete aggregation if >5 States)																			
		State 2																			
		State 3																			
		State 4																			
		State 5																			
Investment 2		State 1 (or complete aggregation if >5 States)																			
		State 2																			
		State 3																			
		State 4																			
		State 5																			
Investment 3		State 1 (or complete aggregation if >5 States)																			
		State 2																			
		State 3																			
		State 4																			
		State 5																			
Investment 4		State 1 (or complete aggregation if >5 States)																			
		State 2																			
		State 3																			
		State 4																			
		State 5																			
Investment 5		State 1 (or complete aggregation if >5 States)																			
		State 2																			
		State 3																			
		State 4																			
		State 5																			
Investment 6		State 1 (or complete aggregation if >5 States)																			
		State 2																			
		State 3																			
		State 4																			
		State 5																			
Investment 7		State 1 (or complete aggregation if >5 States)																			
		State 2																			
		State 3																			
		State 4																			
		State 5																			
Investment 8		State 1 (or complete aggregation if >5 States)																			
		State 2																			
		State 3																			
		State 4																			
		State 5																			
Investment 9		State 1 (or complete aggregation if >5 States)																			
		State 2																			
		State 3																			
		State 4																			
		State 5																			
Investment 10		State 1 (or complete aggregation if >5 States)																			
		State 2																			
		State 3																			
		State 4																			
		State 5																			
Investment 11		State 1 (or complete aggregation if >5 States)																			
		State 2																			
		State 3																			
		State 4																			
		State 5																			
Investment 12		State 1 (or complete aggregation if >5 States)																			
		State 2																			
		State 3																			
		State 4																			
		State 5																			
Investment 13		State 1 (or complete aggregation if >5 States)																			
		State 2																			
		State 3																			
		State 4																			
		State 5																			
Investment 14		State 1 (or complete aggregation if >5 States)																			
		State 2																			
		State 3																			
		State 4																			
		State 5																			
Investment 15		State 1 (or complete aggregation if >5 States)																			
		State 2																			
		State 3																			
		State 4																			
		State 5																			
Investment 16		State 1 (or complete aggregation if >5 States)																			
		State 2																			
		State 3																			
		State 4																			
		State 5																			
Investment 17		State 1 (or complete aggregation if >5 States)																			
		State 2																			
		State 3																			
		State 4																			
		State 5																			

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In furtherance of the objectives of the Better Buildings Challenge, the Department of Energy (DOE) intends to publicly post information submitted in response to this template on the Better Buildings Challenge website. Information submitted to DOE will be handled in accordance with all applicable federal laws, rules, or regulations, including but not limited to the Trade Secrets Act, 18 U.S.C. § 517, and the Freedom of Information Act (FOIA), 5 U.S.C. § 552, and DOE's implementing regulations at 10 CFR 1004. Participation in the Better Buildings Challenge is voluntary. Do not include any personal or confidential commercial and financial information in response to this template. Commercial and financial information considered to be confidential when its release would be likely either to harm the submitter's commercial interests or to affect the agency's ability to obtain information in the future. This statement serves as your written notice that DOE intends to publicly post the information. By submitting information in response to this template, you are certifying that this information does not contain confidential commercial or financial information.

DO NOT CHANGE THIS SHEET

These lists are used in data validation of cells elsewhere in this workbook -- altering them will affect

Ally List

AFL-CIO
Abundant Power
Blue Hill Partners
Citi
Clean Fund
Energi
GE Capital
Green Campus Partners
Greenwood Energy
Metrus Energy
Renewable Funding
Samas Capital
SCIEnergy
Ygrene Energy

State List

AL
AK
AZ
AR
CA
CO
CT
DE
FL
GA
HI
ID
IL
IN
IA
KS
KY
LA
ME
MD
MA
MI
MN
MS
MO
MT
NE
NV
NH
NJ
NM
NY
NC
ND
OH
OK
OR
PA
PR
RI
SC
SD
TN

Building Use List

Education
Food Sales
Food Service
Health Care
Inpatient
Outpatient
Lodging
Retail (Other Than Mall)
Retail (Mall)
Office
Public Assembly
Public Order and Safety
Religious Worship
Service
Warehouse and Storage
Other
Vacant

TX
UT
VT
VA
WA
WV
WI
WY

: these other cells

Product Type List	Number of Buildings / States List
Product A	1
Product B	2
Product C	3
Product D	4
Product E	5
Product F	More than 5
Product G	0
	0