

PACE design and launch services

Design

1. Define PACE business playbook: Business areas
 - o Program overview and benefits
 - Capital stack relief and project feasibility
 - Energy audits and other requirements unique to PACE
 - Lender consent strategy
2. Determination of product use compared to current offerings
 - o Core bank business
 - o Top markets to target outside of existing footprint
 - Market strategy – entry and 3 year ramp up
 - o Competitive analysis and recommendations
 - SWOT or similar analysis
 - Key differentiator strategy
 - o Pricing-PACE originations and fees
 - Originations
 - PACE fee structure
 - Third-party fees
3. Hiring and Training of personnel
 - o PACE 101, 201, etc.
 - o Human resource needs – admin, underwriting, servicing, origination
 - o Servicing and processing
 - o Market/program engagement/qualification/requirements/research
 - o Legal – proprietary documents, program/gov't considerations/documentation
 - o Targeted training in conjunction with qualified hires
 - o Assist in hiring process through network

Launch

1. Assist in establishing relationships -program admin, contractor, econ dev. in target markets
2. Assist in origination process as necessary
3. Coach new staff through first new construction and existing building transactions

Team

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