Partner Application Checklist

Partner Applicant Company Name:_____

Part 1. Hard Copy Documents (check that all items are included)

1. Send two (2) hard copies of ALL the following forms with original signatures to:

Multifamily Partner Liaison
TRC Solutions
10 Maxwell Drive, Suite 200
Clifton Park, NY 12065

☐	Partner Application Checklist	This document
☐	Partnership Agreement Signature Form	Partnership Agreement, page 5
☐	Attachment B	Partnership Agreement, page B-1
☐	Attachment C	Partnership Agreement, page C-1
☐	Attachment D (*required even if none of the boxes are checked)*	Partnership Agreement, page D-1

Part 2. Electronic Documents (check that all items are included)

Provide electronic copies of the following documents in pdf format on CD-ROM and send to:

Multifamily Partner Liaison
TRC Solutions
10 Maxwell Drive, Suite 200
Clifton Park, NY 12065

HARD COPIES ARE NOT REQUIRED FOR PART 2 DOCUMENTS

2a. Partnership Agreement

☐	Partner Application Checklist	This document
☐	Partnership Agreement Signature Form	Partnership Agreement, page 5
☐	Attachment B	Partnership Agreement, page B-1
☐	Attachment C	Partnership Agreement, page C-1
☐	Attachment D (*required even if none of the boxes are checked)*	Partnership Agreement, page D-1

2b. Capability to Conduct Business Successfully: ***(select option 1 or 2 or 3)***

☐ **Option 1**	**Dunn and Bradstreet report**	Showing satisfactory credit score (e.g. D&B Business Information Report)
	OR	
☐ **Option 2**	**Better Business Bureau Membership**	Proof of current membership in the Better Business Bureau
	OR	
☐ **Option 3**	**ALL of the following three (3) items**	1. **Satisfactory banking reference.** Include a letter from the bank confirming that the account of the company/organization is in good standing.

		2. Proof that the **company/organization has been in business for 3 or more years**, or as approved by NYSERDA, has been started by an experienced individual in the field (*Signed statements are acceptable.)*
		3. Confirmation that all **principles of the company have satisfactory individual credit scores** *(Signed statements are acceptable)*
2c. Ability to Serve the Program Confirm that the following documentation has been submitted. (See Attachment A of the Partnership Agreement)		
☐	**Three Case Studies** (A case study template is provided with the application materials)	☐ Summary of energy efficiency scope of work ☐ Summary of project funding ☐ Description of the company/organization's direct participation in the project ☐ References – owner, developer, A&E firms, and trade contractors, where appropriate. ☐ A whole building audit report or proposed design for one (1) of the Case Studies
☐	**Energy Modeling Experience**	Note which whole-building software modeling tools are used, how they have been used and for how long
☐	**Staff Resumes**	Include resumes for staff that will work on the Multifamily Performance Program.
☐	**Plan for serving multifamily projects under this Program** *(provide all of the following)*	☐ Primary individuals anticipated to work on this Program and their expected roles (including subcontractors) ☐ Management structure ☐ Internal quality control process
☐	**Subcontractors** (optional)	If subcontractors are named in your submission, provide the following documentation: ☐ **Letter(s) of interest** from named subcontractors ☐ **Resume(s)** from named subcontractor staff ☐ Describe **Role(s)** of named subcontractors

This is not intended to be an exhaustive list of requirements. Refer to the Partnership Agreement and Attachment A for explicit details.