



**focus on energy**  
Partnering with Wisconsin utilities



# WHOLE HOME TRADE ALLY ENROLLMENT APPLICATION

**Complete and return signed application and requested documents** if you are a contractor requesting to participate in the Home Performance with ENERGY STAR® Program as a Whole Home Trade Ally. A general Focus on Energy Trade Ally application must be on file with Focus on Energy prior to applying to be a Whole Home Program Trade Ally. To request a Focus on Energy Trade Ally application, email [tradeally@focusonenergy.com](mailto:tradeally@focusonenergy.com) or visit [focusonenergy.com/tradeally](http://focusonenergy.com/tradeally).

## SECTION 1: COMPANY INFORMATION (If your company has multiple offices in Wisconsin, please complete an application for each location)

Legal Company Name (on file with the IRS and BPI):		<input type="checkbox"/> Primary or <input type="checkbox"/> Branch	
DBA (if different than name above):		Name/Title of Authorized Company Individual:	
Company Address (No PO Boxes accepted):			
City:		County:	State: Zip Code:
Phone Number:	Fax Number:	Year Company Established:	Number of Employees at this Location:
Company Email Address:		Company Website:	

## SECTION 2: CERTIFICATION INFORMATION (REQUIRED INFORMATION. NOTE: If your company's Building Performance Institute (BPI) or Department of Energy (DOE) Home Energy Score professional is not on staff, please provide the name of the company performing the testing)

BPI Building Analyst or Envelope Professional Certified Staff: <input type="checkbox"/> Using subcontractor <input type="checkbox"/> In-house <input type="checkbox"/> None	DOE Home Energy Score Assessor: <input type="checkbox"/> Using subcontractor <input type="checkbox"/> In-house <input type="checkbox"/> None
BPI Certified Staff Name(s) or Company Name (if using a subcontractor):	DOE Home Energy Score Assessor Staff Name(s) or Company Name (if using a subcontractor):
BPI Accreditation ID Number:	DOE Assessor ID Number:

## SECTION 3: COMPANY INFORMATION (This information will be posted on the website and provided to prospective customers)

Company Name:			
Address:			
City:		County:	State: Zip Code:
Phone Number:		Fax Number:	
Email Address:		Website:	
Company Contact (optional):			
Brief description of services offered by company:			

**SECTION 4: COMPANY CONTACT INFORMATION** (Please list individuals at this location that should receive program updates and information)

Primary Contact Name:		Title/Department:		
Phone Number:	Extension:	Cell Phone:		
Email Address:		State:	Zip Code:	
Secondary Contact Name:		Title/Department:		
Phone Number:	Extension:	Cell Phone:		
Email Address:		State:	Zip Code:	
Additional Contact Name:		Title/Department:		
Phone Number:	Extension:	Cell Phone:		
Email Address:		State:	Zip Code:	
Additional Contact Name:		Title/Department:		
Phone Number:	Extension:	Cell Phone:		
Email Address:		State:	Zip Code:	

**SECTION 5: SERVICE AREAS** (Select the counties that this company location primarily services.)

<input type="checkbox"/> Adams	<input type="checkbox"/> Douglas	<input type="checkbox"/> Kewaunee	<input type="checkbox"/> Ozaukee	<input type="checkbox"/> Taylor
<input type="checkbox"/> Ashland	<input type="checkbox"/> Dunn	<input type="checkbox"/> La Crosse	<input type="checkbox"/> Pepin	<input type="checkbox"/> Trempealeau
<input type="checkbox"/> Barron	<input type="checkbox"/> Eau Claire	<input type="checkbox"/> Lafayette	<input type="checkbox"/> Pierce	<input type="checkbox"/> Vernon
<input type="checkbox"/> Bayfield	<input type="checkbox"/> Florence	<input type="checkbox"/> Langlade	<input type="checkbox"/> Polk	<input type="checkbox"/> Vilas
<input type="checkbox"/> Brown	<input type="checkbox"/> Fond du Lac	<input type="checkbox"/> Lincoln	<input type="checkbox"/> Portage	<input type="checkbox"/> Walworth
<input type="checkbox"/> Buffalo	<input type="checkbox"/> Forest	<input type="checkbox"/> Manitowoc	<input type="checkbox"/> Price	<input type="checkbox"/> Washburn
<input type="checkbox"/> Burnett	<input type="checkbox"/> Grant	<input type="checkbox"/> Marathon	<input type="checkbox"/> Racine	<input type="checkbox"/> Washington
<input type="checkbox"/> Calumet	<input type="checkbox"/> Green	<input type="checkbox"/> Marinette	<input type="checkbox"/> Richland	<input type="checkbox"/> Waukesha
<input type="checkbox"/> Chippewa	<input type="checkbox"/> Green Lake	<input type="checkbox"/> Marquette	<input type="checkbox"/> Rock	<input type="checkbox"/> Waupaca
<input type="checkbox"/> Clark	<input type="checkbox"/> Iowa	<input type="checkbox"/> Menominee	<input type="checkbox"/> Rusk	<input type="checkbox"/> Waushara
<input type="checkbox"/> Columbia	<input type="checkbox"/> Iron	<input type="checkbox"/> Milwaukee	<input type="checkbox"/> Sauk	<input type="checkbox"/> Winnebago
<input type="checkbox"/> Crawford	<input type="checkbox"/> Jackson	<input type="checkbox"/> Monroe	<input type="checkbox"/> Sawyer	<input type="checkbox"/> Wood
<input type="checkbox"/> Dane	<input type="checkbox"/> Jefferson	<input type="checkbox"/> Oconto	<input type="checkbox"/> Shawano	
<input type="checkbox"/> Dodge	<input type="checkbox"/> Juneau	<input type="checkbox"/> Oneida	<input type="checkbox"/> Sheboygan	
<input type="checkbox"/> Door	<input type="checkbox"/> Kenosha	<input type="checkbox"/> Outagamie	<input type="checkbox"/> St. Croix	

## SECTION 6: PROGRAM REQUIREMENTS (Please initial next to each line that you have read and agree to program requirements)

This Enrollment Application sets forth the requirements for participating in the Home Performance with ENERGY STAR Program as a Whole Home Trade Ally.

\_\_\_\_\_ **TERMS AND CONDITIONS:** Trade Ally agrees to the terms and conditions of the Focus on Energy Trade Ally code of conduct found at [focusonenergy.com/tradeally](http://focusonenergy.com/tradeally).

\_\_\_\_\_ **PRODUCTION LEVEL:** Trade Ally is required to complete at least five projects per calendar year with at least one project per quarter and no more than two consecutive quarters without a completed project. If production levels are not met, Trade Ally may be put on probation or terminated by Focus on Energy.

\_\_\_\_\_ **INCENTIVE PAYMENTS:** Incentives can be provided either as a direct payment to the homeowner (customer) or as an instant discount deduction from the final invoice. If the participating Trade Ally chooses not to offer the instant discount option, the Trade Ally agrees that they must submit complete and final project paperwork to Focus on Energy within 5 working days of issuing the final invoice to the customer. Trade Allies that are not compliant with this requirement, or continually provide incomplete models or documentation will be required to only offer the instant discount.

\_\_\_\_\_ **BUILDING PERFORMANCE INSTITUTE (BPI) CERTIFICATION:** Trade Ally shall provide homeowners an assessment and report, and project oversight that is consistent with BPI Building Analyst Technical Standards utilizing a whole home approach. Trade Ally executing the assessment must hold either a Building Analyst Professional certification or equivalent certification. Trade Ally is required to calculate proper building ventilation according to ASHRAE 62.2.

\_\_\_\_\_ **DEPARTMENT OF ENERGY (DOE) HOME ENERGY SCORE CERTIFICATION:** Trade Ally shall provide homeowners a Home Energy Score along with the assessment report. Trade Ally executing the Home Energy Score must hold a DOE Home Energy Score Assessor credential.

### \_\_\_\_\_ **ENERGY ASSESSMENT PROGRAM REQUIREMENTS TIER 1:**

- A blower door test is required and must be performed before and after work is complete. Blower door testing must be done in accordance to BPI standards.
- Combustion safety testing is required and must be performed before and after work is complete. Combustion safety must be done in accordance to BPI standards.
- Digital thermography (infrared camera) testing is recommended, but not required.
- Data needed to complete a project in the program's approved modeling software is required.
- Assessment must be submitted through Snugg Pro software.
- Assessment must include a Home Energy Score.

### \_\_\_\_\_ **ENERGY ASSESSMENT PROGRAM REQUIREMENTS TIER 2:**

- Homeowners that are eligible for Tier 2 must submit an **Income Eligibility Application** and be approved by the program. A Whole Home Trade Ally may not execute a Tier 2 energy assessment prior to the program approving the application and the homeowner receiving the acceptance letter. The Whole Home Ally who performs the energy assessment will be reimbursed \$150. The homeowner is required to pay a \$50 co-pay to the Trade Ally to initiate a comprehensive energy assessment.
- Combustion safety testing is required and must be performed before and after work is complete. Combustion safety must be done in accordance to BPI standards.
- Digital thermology (infrared camera) testing is recommended, but not required.
- Data needed to complete a project in the program's approved modeling software is required.
- Blower door testing is required for Tier 2 energy assessments once the homeowner initiates the \$50 co-pay. Blower door test must be performed before and after work is complete and be done in accordance to BPI standards.
- Assessment must be submitted through Snugg Pro software.
- Assessment must include a Home Energy Score.

\_\_\_\_\_ **MATERIAL AND INSTALLATION GUIDELINES:** Trade Ally shall perform work in accordance with the program's Material and Installation (M&I) Standards and Guidelines.

\_\_\_\_\_ **QUALITY ASSURANCE AND QUALITY CONTROL:** Trade Ally shall allow random field inspections by the program, or a program designee, of work performed by the Trade Ally. Trade Ally shall expect 100 percent of the first three and a minimum of 5 percent thereafter of quality control and verification inspections of all projects performed by the Trade Ally. Trade Ally, upon request of the program, and at no additional cost to the customer, shall make reasonable repairs or corrections to work or issues as a result of work that the Trade Ally has performed to bring such work up to program standards. Focus on Energy shall have sole authority in determining the necessary remedies to correct faulty work. Trade Ally shall remedy any defects of a non-emergency nature within 14 days and any defects of an emergency nature immediately, upon notice by the customer or Focus on Energy. Examples considered to be emergencies are those that include, but are not limited to: conditions that might impact occupant health or safety or those conditions that would impact proper operation of any existing mechanical systems, etc. Failure to follow the return repair time line as stated above can result in probation and or termination.

\_\_\_\_\_ **CONSUMER WARRANTY:** Trade Ally shall warranty the installation of work performed for no less than one year following the date of installation.

\_\_\_\_\_ **INSURANCE REQUIREMENTS:** During the term of the Trade Allies participation in the program, the Trade Ally shall maintain insurance coverage that satisfies the minimum insurance requirements set forth below. Trade Ally shall arrange for the insurer(s) of all required insurance to prepare a certificate(s) of insurance in favor of CLEAResult Consulting, LLC, the Program Implementer for Focus on Energy's Home Performance Program. The Commercial General Liability Policy must include Waiver of Subrogation. Certificates will be on the ACORD form and will provide the name of the carrier, policy number, effective and expiration dates and limits of liability. The insurance coverage requirements must be secured before commencing the first project. Trade Ally has two months from the start of their first project to deliver the requisite documentations to the Program Implementer, and annually thereafter.

- Workers' Compensation Insurance for Trade Allies employees to the extent of statutory limits.
- Commercial General Liability Insurance as applicable to the Trade Allies obligations under this program with industry-appropriate coverage limits.
- Automobile Liability Insurance which applies to any automobile owned, hired or rented by Trade Ally, used in the work performed to the extent of statutory requirements.

\_\_\_\_\_ **PROBATION:** Trade Ally may be placed on probation by Focus on Energy for not meeting or following program standards or guidelines. Trade Ally will be notified by mail, fax or email. The probation will be effective as of the date the probation letter is received by the Trade Ally. The letter will be mailed to the company address on file. The probation period will last for a period of 90 days, at which time the Program Administrator or Program Implementer will re-evaluate the Trade Ally's program status.

\_\_\_\_\_ **TERMINATION:** Trade Ally status may be terminated without penalty by the Trade Ally or Focus on Energy for any reason and at any time. Written notice of termination must be sent to the non-terminating party by mail, fax or email. When termination is initiated by written notice, termination will be effective as of the date the termination letter is received by the non-terminating party. Upon termination, Trade Ally, and if applicable, Trade Ally's customer, shall be eligible to receive incentive payments earned prior to the termination of the Trade Ally status. Notwithstanding anything to the contrary, no payments will be made for any anticipated profits, revenues or the like as a result of termination.

**SECTION 7: APPLICATION SUBMISSION REQUIREMENTS** (Check the box signifying you have read and agree to the statement)

- A general Trade Ally application must be on file with Focus on Energy prior to applying to be a Whole Home Trade Ally. To request an application, email [tradeally@focusonenergy.com](mailto:tradeally@focusonenergy.com) or visit [focusonenergy.com/tradeally](http://focusonenergy.com/tradeally).
- To be considered an active Whole Home Trade Ally, this application must be completed, signed and returned to us along with a W-9 form. Trade Ally must also maintain insurance coverage that satisfies the minimum requirements set forth below and must provide copies of the insurance policy two months from the date of the Trade Ally's first project and on an annual basis thereafter.
- Focus on Energy and the Home Performance with ENERGY STAR Program reserves the right to deny a Trade Ally's application.
- Trade Ally may be asked to update company information on an annual basis. It is the responsibility of the Trade Ally to update their company information if changes occur mid-year. Changes can be emailed to [homeperformance@focusonenergy.com](mailto:homeperformance@focusonenergy.com).

**SECTION 8: SIGNATURES** (Please read and sign. Applicants will be notified of program eligibility by phone or email, followed by a letter sent via U.S. Mail)

I have read, understand and agree to comply with all partnership commitments described in the Focus on Energy Home Performance with ENERGY STAR Program - Whole Home Trade Ally Enrollment Application, including all participation statuses, and all supporting policies described or referenced therein. I understand that my participation in the Home Performance with ENERGY STAR Program is not approved until I have completed and/or submitted the necessary documents referenced therein and the program has reviewed and executed this Agreement.

I understand the provisions of this Agreement are effective through December 31, 2018. Focus on Energy reserves the right to modify, at any time during this Agreement term, the provisions of this Agreement. I certify, under penalties of law, that the statements made in this Agreement have been examined by me and are true and complete. I understand that by signing this Agreement, I consent to any other inquiry to verify or confirm the information I have provided.

**AUTHORIZED COMPANY CONTACT** (Must match name listed in Section 1)

Signed Name:	Title:
Print Name:	Date:

**OFFICE USE ONLY**

<input type="checkbox"/> Approved	Documentation Received		
	<input type="checkbox"/> Workers' Compensation Insurance	<input type="checkbox"/> Commercial General Liability Insurance	<input type="checkbox"/> Automobile Liability Insurance
<input type="checkbox"/> Denied	Reason(s):		

Authorized Program Representative:	Date:
------------------------------------	-------

**FORM SUBMITTAL – RETURN SIGNED, COMPLETE TRADE ALLY APPLICATION AND REQUESTED DOCUMENTS TO:**

**Mail:** Focus on Energy Trade Ally Management, 3113 W. Beltline Highway, Suite 100 Madison, WI 53713

**Email:** [HomePerformance@focusonenergy.com](mailto:HomePerformance@focusonenergy.com) **Questions:** 855.339.8866