

Contractor Participation Application



| TERMS & CONDITIONS | |
|---|---|
| Contractor Participation | |
| Application Fee | A non-refundable application fee of \$40 is required when submitting an application to be an authorized program contractor ("Authorized Contractor"). Applicants will be notified of their acceptance status within 5 business days from receipt by the Agency of a completed contractor application form and payment. |
| Contractor Directory | Only Authorized Contractors are listed in the on-line Contractor Directory located on the program's website. The on-line Contractor Directory is viewable and searchable by all visitors interested in obtaining proposals for the installation of qualifying improvements to their properties. An Authorized Contractor will remain in the Directory as long as the contractor remains a contractor in "Good Standing". |
| Contractor in "Good Standing" | Authorized Contractors are considered in "Good Standing" when they fully abide by these terms and conditions and the program's Code of Conduct. Authorized Contractors will be reviewed on an ongoing basis and the determination of their "Good Standing" is at the sole discretion of the Agency. Contractors who lose their "Good Standing" status will receive a written notice and actions for the restoration of their "Good Standing" designation. |
| State Licensure | Contractors with a valid Florida Contractor's license (certification or registration) on file and current as listed on the Florida Board of Business and Professional Regulation website may apply to become an Authorized Contractor. Licensing must be current and in effect before financing may be approved, while work is being performed and as a condition of final payment. Authorized Contractors may only perform financed work within their jurisdictional and trade-specific areas. In addition, all work performed must be in accordance with the local Building Code in effect at the time work is performed Prevailing federal, state and local contracting regulations are incorporated by reference. |
| Local Licensure | Contractors with a valid local Contractor's license on file and current with the local government building department may apply to become an Authorized Contractor. Licensing must be current and in effect before financing may be approved, while work is being performed and as a condition of final payment. Authorized Contractors may only perform financed work within their jurisdictional and trade-specific areas. In addition, all work performed must be in accordance with the local Building Code in effect at the time work is performed Prevailing federal, state and local contracting regulations are incorporated by reference. |
| Subcontractors | All subcontractors hired by an Authorized Contractor to perform program work must possess the requisite licensure and also be an Authorized Contractor as described in these terms and conditions. |
| No license required | Contractors proposing qualified improvements for which installation no license is required by state or local regulation or building department requirements, must complete the application form to be an Authorized Contractor and pay the application fee as indicated above. |
| Code of Conduct | As a condition of becoming an Authorized Contractor, the contractor must agree to the program's Code of Conduct available on the program's website. |
| Jurisdiction and Licensed Trades | Authorized Contractors may install or construct qualified improvements for property owners who have been accepted into the program and whose property is located within the jurisdiction of a subscribing local government. Authorized Contractors may only perform work under this program within the jurisdictions and trades they are licensed. |
| Qualifying Improvements | Qualifying improvements generally include energy efficiency, renewable generation and wind resistance improvements. Final approval of proposed qualifying improvements rests solely with the Florida Pace Funding Agency ("Agency"). |
| Limited Financing Amount | The total amount of any non-ad valorem assessment for a property may not exceed 20% of the assessed value of the property as determined by the local government property appraiser. Non-residential energy efficiency projects that exceed the 20% maximum amount for non-ad valorem assessments must submit for review and acceptance an energy analysis conducted and signed by a licensed design professional demonstrating that the Savings/Investment Ratio ("SIR") is 1.0 or greater. The Agency reserves the right to request additional clarification and information as is necessary to accept the analysis as reasonable and complete. |
| Eligible Measures | Only qualifying improvements as described in section 163.08 (2011) of the Florida Statutes are eligible for the program. Approval of qualifying improvements rests with the Agency and shall be final. |
| Proposal Costs | As with regular proposals for work, Authorized Contractors bear the responsibility for all costs associated with bidding qualifying improvements to the property owner. |
| Contractor Cost | Authorized Contractor shall receive 98% of the total project cost. The 2% discount will be retained by the Agency as a program participation fee. |
| Final Payment | Final payment to the Contractor requires: (a) Building Inspector inspection and approval; (b) Agency inspection and approval; and (c) acceptance by the property owner. |



RENEWABLE ENERGY



WIND RESISTANCE



ENERGY EFFICIENCY



* Contact a Florida PACE Funding Agency Program Representative at: (866) 558-3180, or Email: info@FloridaPACE.gov

Please initial:

Rev 1.1

Contractor Participation Application



| TERMS & CONDITIONS (cont.) | |
|---|---|
| Contractor Participation (cont.) | |
| Change Orders | In some cases, proposed and approved work may, upon initiation, require slight changes to accommodate conditions unknown at the time of proposal. To the extent that such changes would nullify the ability to complete the proposed work, change orders may be accommodated subject to the approval of the Agency. Additionally, the inclusion of such change orders must still result in overall program compliance (e.g., 20% of assessed value limits). All Agency decisions shall be final. |
| Contractor Training | Contractors have access to web-based training modules at no charge. Modules may include information about Florida's PACE program, steps to complete a project under the program, how to leverage the program to increase sales, and how to take advantage of sponsorship opportunities. |
| Contractor Marketing Materials | Authorized Contractors have no-cost access to professionally-developed marketing materials that describe the program's features and benefits. |
| Project Documentation Requirements | |
| Project Proposal | Property owners are responsible for submitting the project proposal of the Authorized Contractor they select to the Agency for review and acceptance to complete their application. Proposals must include a completed Bid Summary Form (available on the program website) and attachments, as specified. |
| Energy Savings Estimates | Energy savings estimates are required for all qualifying improvements and are submitted as part of the Bid Summary Form (available on the program website). Energy savings estimates may be provided by an Authorized Contractor, utility energy audit, certified energy rater, building energy analyst, or other energy professional acceptable to the Agency. Any fees associated with these energy calculations may be included in the final project cost. In cases where the Florida Building Code or the local building official requires the preparation of a building energy simulation model, prepared and signed by a licensed design or energy professional, the model results must be included with the Bid Summary. |
| Project Package | The Project Package will be submitted by the property owner at the conclusion of the proposed and approved work. The Project Package includes: the Bid Summary, signed Building Permit, signed Customer Acceptance Form, warranties, and guarantees. The Contractor web-based portal includes access to a standard forms library. |
| Building Permit | A signed copy of the building permit, for any approved work for which a building permit is required, must be submitted to the Agency as a condition of final payment. |
| Property Owner Project Acceptance | As a condition of final payment, the property owner must sign a Property Owner Acceptance Form (available on the program web site) certifying acceptance of all work. |
| Energy Savings Estimates | Contractor will be provided training and access to an energy savings estimation and a cost proposal support tool which must be used by all Authorized contractors. |
| Conditions | |
| <ul style="list-style-type: none"> • (1) Neither the Agency nor its representatives or agents, including the Third Party Administrator, has any obligation or responsibility for determining whether your existing lender or servicer will permit or be take adverse action against you as a result of the addition of this assessment. You are encouraged to consult with a financial and/or legal professional to address these issues. • (2) Neither the Agency nor its representatives or agents, including the Third Party Administrator, has any obligation or responsibility, including but not limited to terms, completion and approval of services, or payment, regarding any agreement between the property owner and any contractor for the eligible improvements. • (3) Neither the Agency nor its representatives or agents, including the Third Party Administrator, is aware of or makes any representations regarding the condition of the property, or for any circumstances which may affect the completion of eligible improvements thereon. • (4) Once the financing closing for the eligible improvements has occurred, any increase in the cost of completion of eligible improvements must be financed by either a separate application for Agency financing, if approved, or other sources to be determined by the property owner. | |



RENEWABLE ENERGY

WIND RESISTANCE

ENERGY EFFICIENCY