

SEND Home Energy Conservation Program

AUDITOR Necessary Documentation

Checklist of items that must be submitted to SEND in order to become an approved auditor.

- 1) PROPOSAL INFORMATION – Details on-line at www.sendcdc.org
- 2) INDEPENDENT AUDITOR AGREEMENT
- 3) NON-DISCLOSURE AND CONFIDENTIALITY AGREEMENT – A separate copy signed by each individual who handles client information
- 4) CERTIFICATE OF INSURANCE – General liability insurance with minimum aggregate limits of \$1,000,000 for bodily injury and property damage. The policy must include a contractual liability endorsement covering Auditor's obligations under this Agreement. The certificates must name the Indiana Builders Association (IBA) as an additional insured, and shall contain a 30-day prior notice provision of cancellation, termination or material change in coverage.
- 5) CERTIFICATE OF INSURANCE FOR WORKMAN'S COMPENSATION INSURANCE IN AMOUNTS REQUIRED BY STATE LAW (or Exemption Certificate, if applicable)
- 6) CERTIFICATE OF SUCCESSFUL COMPLETION
 - a) of the 6 week Indiana Winterization Providers course under American Recovery and Reinvestment ActOR
 - b) BPI Certified Building Analyst training through the Indiana Community Action Association (INCAA)
- 7) CLASSIFICATION CERTIFICATION (if applicable)
 - a) Of a Minority Owned Business Entity as defined in IC4-13-16.5OR
 - b) Of a Woman Owned Business Entity as defined in IC4-13-16.5
- 8) CURRENT W-9 REQUEST FOR TAXPAYER IDENTIFICATION NUMBER AND CERTIFICATION FORM – <http://www.irs.gov/pub/irs-pdf/fw9.pdf?portlet=3>