

## Instructions for Submitting Service Provider Proposals

Please read the following instructions before submitting service provider proposal to NY Green Bank.

1. Go to [www.greenbank.ny.gov](http://www.greenbank.ny.gov).
2. In the top menu navigation of the site, hover over “**Work with Us**,” and click on “**Service Providers**” in the drop-down menu. On this page, locate the investment RFP for which you are submitting a proposal.
3. Under the section entitled “**Submitting Proposals**” click the “**Submit Proposal Online**” button.
4. Log in with your NY Green Bank Portal Username and Password credentials, or create an account if you do not already have one.
5. **To Create an Account:**
  - Input your company and contact information in the sections provided, and complete all the required fields.
  - You will receive a portal registration confirmation email at the address you entered.
  - Check your email for the auto-generated portal welcome email, and use the information provided to log in to the system.
  - Feel free to save your proposal submission at any time, log out, and return to it at a later date.
6. **Portal Navigation:**
  - **Blue Action Boxes** at the top of the page provide further direction as you fill out the proposal submission sections.
  - **Green Action Boxes** contain text notifying user success in the specified proposal submission step.
  - **Red Action Boxes** contain text for any proposal submission errors that need to be corrected by the user.
  - *Help text* is provided by hovering over the question mark icon next to a given field. ( ? )
  - *Required fields* are denoted by red asterisks (\*).
  - If you accidentally navigate away from your proposal submission while in the portal, you can access your submission by going back to the initial submission page on NY Green Bank’s website.
7. **Inputting Key Information:** Follow the instructions in the blue action box and fill out information for:
  - Proposer Contact Information\* (**Step 1**); and
  - Proposal Information (**Step 2**).

\* For Proposer contact addresses that are outside the U.S., please use NY Green Bank’s address in completing the online form (1359 Broadway, 19<sup>th</sup> Floor, New York, New York 10018) in the portal and clearly include the international address and phone number within your proposal.

**8. Proposal Budget (Step 3):**

- When submitting a Service Provider Proposal, enter a "0" in the "Estimated Total Project Cost" field.

**9. Proposal Documents (Step 4):**

- The electronic file names should include the proposing entity's name in the title of the document (note: there is an 80-character limit).
- You may submit Word, Excel or PDF files (file formats can include csv, doc, docx, gif, jpeg, jpg, pdf, png, ppt, pptx, pps, ppsx, tif, txt, xls, xlsx, and zip). Individual files should not exceed 100 MB in file size.
- Under "**Required Documents**," upload your proposal, which should address each of the "Proposal Contents Sections" outlined in each respective investment RFP document on NY Green Bank's website.
- Under "**Optional Documents**," upload any supplemental material that you consider is necessary for NY Green Bank staff to consider when reviewing your proposal. Please note that there is a maximum number of six (6) additional attachments.

**10. Authorized Signature & Certification (Step 5)**

- Review contents of your submission for accuracy, and check the certification box.

**11. Proposal Submission (Step 6)**

- Press the "**Submit**" button.
- You will see a dialogue box confirming successful submission and will receive a confirmation email.

**If You Need Help At Any Point During the Submission Process:**

Refer to the "**RFP Resources**" section of NY Green Bank's website or email [NYGBRFP9@greenbank.ny.gov](mailto:NYGBRFP9@greenbank.ny.gov).

To speak to someone, you may also call NY Green Bank's main line at (212) 379-6260 during normal business hours.