

Energy Trust of Oregon

Request for Qualifications:

Business development and technical training for solar trade ally contractors

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Printed 03/09/2018

Energy Trust of Oregon, Inc. (Energy Trust), an Oregon non-profit, 501(c)(3) corporation, is seeking qualifications from training providers for all aspects of solar technical training, business management, project management, people management, quality management, sales and marketing training with a focus on small business solar installation contracting companies.

Energy Trust Overview

Energy Trust is an independent nonprofit corporation organized to help carry out a 1999 Oregon law requiring utilities to dedicate three percent of their revenues to energy efficiency and renewable energy development. With an annual budget of approximately \$160 million, our mission is to “change how Oregonians produce and use energy by investing in efficient technologies and renewable resources that save dollars and protect the environment.”

The Solar Electric Program is one of Energy Trust’s renewable energy offerings. In order to develop the solar market across all sectors and gain long-term solar electricity generation to benefit the customers of PGE and Pacific Power in Oregon, Energy Trust has structured the Program to address the primary market barriers of cost, quality and awareness.

Energy Trust provides:

- cash incentives to eligible Program participants to reduce the above market costs associated with installing solar
- above code installation requirements for systems applying for Program incentives to help promote system performance and longevity
- a closed network of design firms and trade ally installers who are familiar with the Program requirements
- industry support in the form of trainings and cooperative marketing assistance for active trade allies
- consumer outreach and education to help inform Oregonians about their solar options

RFQ Background & Desired Goals

Energy Trust is sensitive to the challenges facing solar contractors in the residential and small commercial sectors and seeks to help contractors develop skills that allow them to stand out amongst competitors. The purpose of this RFQ is to provide Energy Trust with a group of qualified consultants who can provide trade ally contractors with training and educational materials designed to identify and enhance skills critical to business success.

A list of specific training topics and knowledge areas that will be supported under this RFQ is provided in Appendix A. In format as described more specifically below, respondents to this RFQ should describe how their training strategies and materials would cover these areas. Energy Trust welcomes additional topic suggestions beyond those outlined in Appendix A for small business development in the areas of quality management, operational efficiency, technical training, project management, business management, people management, sales, and marketing.

Training Formats

Through this RFQ Energy Trust expects to identify potential providers of multiple training opportunities. Energy Trust will work with successful respondents in an effort to offer training based on delivery platform and type of offering. Training sought is by expert consultants familiar with solar installation contractors and the building trades. Training and educational resources may be provided via webinars or other online format, in classroom, onsite, one-on-one or through standalone materials as described below:

Online Training

Webinar-based training would be provided by respondents through their own platform. More advanced content may be offered at a pre-negotiated cost to the participant. Energy Trust will work with providers to establish a reasonable fee for Energy Trust trade ally contractors. Contractors will pay the training provider directly for any training fees. Contractors not enrolled in the Energy Trust solar trade ally network will have access to online training at full cost when applicable.

Classroom, On Site, One-on-one Training

Classroom, on site, and one-on-one training would be scheduled, coordinated and provided by the training entity. Classroom training would be conducted at a facility fully provided by the respondent. Contractors would contact and pay the training provider directly for any training. Energy Trust would work with providers to negotiate costs and establish a reasonable fee for solar trade ally contractors. Contractors not participating in the solar trade ally network would have access to the training at full cost when applicable.

Standalone Educational Material

Some educational concepts can be most effectively communicated to contractors in a more permanent written format. All literature will be provided in electronic form for download from the Energy Trust trade ally website at no charge. The trade ally website is publicly accessible and contractors not participating in the solar trade ally network will have access to the material.

Desired Training

Proposed training should incorporate learning techniques that foster engagement among participants. Providers are discouraged from placing too great a focus on lectures given by an instructor using only a PowerPoint presentation. Energy Trust prefers innovative techniques that effectively plan for student engagement and provide attendees with actionable next steps to incorporate the lesson into their business success. Strategies may include:

- Use of workbooks and/or small group activities that focus on situational learning using “real world” scenarios
- Exercises requiring review of samples related to course content and small group problem solving breakouts when feasible
- Planned interaction between instructor and attendees on specific scenarios typically encountered by the audience group or unique to their individual business
- Use of hands-on demonstration tools when feasible
- Use of handouts and other resources serving as a learning primer prior to, and a memory refresher following, course delivery
- Tools to reinforce concepts following course delivery

Respondent Qualifications

Respondents to this RFQ that create and develop training courses, modules or other formats should use or develop curricula that meet the most current best practices. Respondents should also be able to demonstrate content mastery and the use of evidence-based practice in curriculum development. High-quality training materials and activities are required for success, and providers that can demonstrate suitable experience, staff, and infrastructure are eligible for consideration.

Additionally, respondents should demonstrate the following:

- Documented experience in curricula development and maintenance
- Knowledge and expertise in the area(s) being targeted
- Experience in engaging business and industry partners and professional organizations
- Established linkages with building trades businesses and industry to ensure the proposed training meets industry needs

- Course materials are of high quality and designed to respond to the specific needs of the contractor
- Attendee evaluation method to track attendee ratings of training quality, efficacy to meet training goals (may be attached as a supporting document)
- Employment of a learning management system that can provide Energy Trust with a report on specific information, e.g. attendance, date of training (may be attached as a supporting document)

RFQ Schedule

Statements of qualifications are accepted on an ongoing basis through March 30, 2018. Energy Trust will review respondent submissions and contact respondents within 30 days of Energy Trust's receipt of a complete submission.

For consideration, all submissions, including questions, must be emailed to:

jeni.hall@energytrust.org

Submission Requirements

The submitted application should be no longer than 6 pages, single spaced. Supporting documentation may be attached to the application. Energy Trust encourages brevity and suggests that the submitted materials be organized in the following order:

- a) Respondent organization's name and address
- b) Primary representative's name, phone and email
- c) Training topics - title(s) and description(s)
- d) Cost and associated fees for training
- e) Availability of training or material
- f) Platform(s) for training delivery (i.e. online, classroom, onsite, standalone material)
- g) Description of trainer(s) qualifications to demonstrate Respondent Requirements as identified above
- h) Disclosure of any director or indirect, actual or potential conflicts of interest with Energy Trust or a statement that no such conflict of interest exists.
- i) Signature box at the end of the submitted materials that contains the following language. A signature box containing this language and a valid signature is required for Energy Trust to consider an application:

By submitting this proposal, the respondent hereby represents that it explicitly agrees and accepts all RFQ Governing Provisions as set forth below in this RFQ. Additionally, respondent hereby represents that the information contained in this proposal and any part thereof, including its exhibits, schedules, and other documents and instruments delivered or to be delivered to Energy Trust, is true, accurate, and complete. This proposal includes all information necessary to ensure that the statements therein do not in whole or in part mislead Energy Trust as to any material fact.

Note: Only the lead trainer's experience, knowledge and expertise need be included. Additional trainers' qualifications may be submitted after the organization's acceptance as an Energy Trust solar trade ally training provider.

RFQ Governing Provisions

1. Agreement to All Terms

By submitting a response to this RFQ, respondent represents that it is authorized to submit a response, all information provided in the response is true and correct, and explicitly agrees and accepts the following provisions of this RFQ and all other terms and conditions set forth in this RFQ.

2. Right to Accept or Reject

This RFQ is not an agreement to purchase goods or services. Energy Trust is not bound to enter into a contract with any qualified respondent. Energy Trust reserves the right to modify the terms of this RFQ at any time in its sole discretion. This includes the right to cancel this RFQ at any time. Further, Energy Trust reserves the right to waive any nonconformity in submissions received, to accept or reject any or all of the items in the submission, and award any ultimate contract in whole or in part as it is deemed in Energy Trust's best interest.

3. Ownership of Responses

All materials submitted in response to this RFQ shall become the property of Energy Trust and shall not be returned to the respondent.

4. Confidentiality

Respondents shall clearly identify those portions for their responses that they do not want revealed to third parties and label such portions as "Confidential Information." Except as required under law or for regulatory purposes, Energy Trust will maintain confidentiality of such information.

5. Respondent Expenses and Waiver of Claims

Respondents are solely responsible for their own expenses in preparing a response and for any subsequent negotiations. Energy Trust will not be liable to any respondent for any claims, whether for costs or damages incurred by the Respondent in preparing the response, loss of anticipated profit in connection with any final contract or any other matter whatsoever. Respondent waives any right it might have to bring a claim against Energy Trust, its Board of Directors, employees, contractors, or agents with respect to any matter arising out the RFQ.

6. Resulting Contract

Any final agreement on tasks to be performed as a result of this RFQ would be set forth in a written contract between Energy Trust and the selected respondent(s) No commitment, obligation, or legal relationship exists between Energy Trust and any respondent until such written agreement is fully executed.

Appendix A

Training Topics & Knowledge Areas

Quality Management

- The importance of companywide quality control processes
- Creating and implementing an effective and efficient QC process
- The cost of poor quality
- Dealing with poor quality process improvement
- Applications for calculating the cost of quality control and the true cost of poor quality
- Assigning accountability and responsibility
- Creating a culture of prevention rather than appraisal
- Identifying defects in workmanship prevention and control
- Concepts and implementation strategies for reducing defects
- Producing loyal and satisfied customers
- Creating a culture that will produce employee pride and loyalty
- How to identify and eliminate waste
- Importance of company specifications, standards, policies & procedures, and protocols
- Understanding quality assurance; what it does and doesn't do, and it's frequency
- Developing a quality management plan
- Implementing a quality management plan
- Analyzing quality management plan results

Technical Training

- Energy Trust solar installation requirements
- National Electrical Code requirements for solar
- National Electrical Code requirements for advanced battery storage
- Design of solar plus advanced battery storage
- Design of solar systems
- Solar system operation and maintenance
- Three-phase system design
- Network communications
- System commissioning

Business Management

- Solar installation contractor business model development
- Creating an effective business plan
- Operating plan as a management tool
- Managing finances and accounting
- Labor pricing – setting profitable hourly rates
- Cash flow budgeting
- Understanding overhead and profit
- IT systems and database management

- Understanding industry standards and how to apply them on the job
- Laws and regulations that impact solar installation contractors
- Using technology in business operation and management
- Metrics: tracking and evaluating business management strategies
- Contract creation – using a thorough scope of work to mitigate risk
- Growing and scaling a solar installation business
- Job costing using accounting software for contractors

People Management

- Managing across difference
- Talent Acquisition, Selection and Retention
- Effective Training Design and Evaluation
- Influence and Leadership
- Conflict Resolution

Project Management

- Project management 101
- Introduction to process management for construction contractors
- Effective project management
- Using technology in project management
- Accurate cost estimating to win the job
- Importance of clear communication to customer experience and installation success
- Managing and mitigating project risk

Sales

- Lead generation and management
- Understanding consultative sales and service
- Effective sales strategies for the solar contractor
- Typical buying objections
- Making the financial case for residential and commercial solar
- Managing a sales team
- Using technology in customer relationship management
- Using technology in sales proposal creation
- Using technology in solar system design
- Efficiently and effectively qualifying leads

Marketing

- Building an effective marketing strategy
- Understanding solar consumers and market segmentation
- Building brand recognition
- Integrated media marketing
- Developing a web presence
- Search engine optimization and marketing

- Establishing an online presence through social media
- Pros and cons of social media advertising
- Using technology to expand marketing
- How to plan, track, analyze and evaluate a marketing program
- Building, designing, and managing a website that converts
- Referral program development
- Canvassing program design and management
- Blogging training – content creation and planning
- Social media training for solar contractors
- PR campaign management