Community Toolkit for Designing and Implementing a Contractor Accelerator Program

November 2023

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Produced by Elevate under the direction of the National Renewable Energy Laboratory (NREL) under Subcontract Agreement 2022-10214.

NREL Technical Monitor: Allison Moe

NREL is a national laboratory of the U.S. Department of Energy
Office of Energy Efficiency & Renewable Energy
Operated by the Alliance for Sustainable Energy, LLC

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Contract No. DE-AC36-08GO28308

Subcontract Report
DOE/GO-102023-6096
November 2023

National Renewable Energy Laboratory
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Notice

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Background and Overview

In many communities within the United States, there is a desire to address the disparities and inequities faced by under-represented populations at the individual level, organizational or business level, and/or community level. These groups may experience limited access to essential resources, services, and opportunities due to historical marginalization and systemic barriers. Tools to help address these disparities include policy reforms, regulatory frameworks, increased access to funding, and collaborations between government agencies, community-based organizations, nonprofits, and private enterprises. As communities look to pursue equitable transitions to local clean energy economies, one place these disparities can become visible is in the workforce that is responsible for implementing this change on the ground.

Elevate is a nonprofit that designs and implements programs that reduce costs, protect people and the environment, and ensure the benefits of clean and efficient energy use reach those who need them most. While Elevate can often assist clean energy developers by matching them with contractors within our network with their projects, additional contractor support that focuses on technical, financial, back-office, and administrative support is often required for businesses to scale their services. Elevate has utilized the mechanism of its Contractor Accelerator programs to support small businesses from historically under-represented communities so that they can better compete and become leaders in the clean energy marketplace.

This toolkit is designed to provide communities with an overview of the methodology and approach to designing, developing, and implementing contractor development programs. Also, it can be used to “frame out” a project for a proposal. For the purposes of this toolkit, we will use the terms “contractor accelerator” and “contractor development” interchangeably to describe engagement activities.

Program Pathways

Within our contractor development programs, there are various pathways that participants can choose to participate in based on their specific needs, goals, and areas of interest. Our work includes continuous engagement with participants so we can further determine their eligibility to participate in vetting processes and further improve their baseline knowledge. We match program participants to service providers in different areas as we assess their growth and eligibility. These pathways are designed to provide targeted guidance and support in specific aspects of the contractor's business.

1. **Skill Development Pathway**: This pathway emphasizes developing and enhancing specific skills or expertise relevant to electrification, weatherization, solar, and energy efficiency. Our programs include training modules, workshops, and mentoring.

2. **Business Development**: This pathway focuses on helping contractors enhance their business development skills. It may include modules on lead generation, sales and marketing strategies, client acquisition techniques, bidding, estimating, and networking. Participants learn how to effectively position themselves in the market, identify and attract potential clients, and bid competitively.

3. **Financial Health**: This pathway is geared towards improving the economic management capabilities of contractors. It covers topics such as budgeting, borrowing, pricing strategies, invoicing, tax planning, and financial forecasting. We are aware of the financial needs of emerging contractors and our programming includes accessible lending.

Through service matching in continuous engagement, contractors can select the areas they want to focus on based on their specific needs and goals as our programming provides resources, mentorship, and networking opportunities. This supports contractors as they progress through their chosen pathways, helping them accelerate their growth and success in the green energy industry.

Process for Developing and Implementing a Contractor Accelerator Program

The following provides an overview of the seven major phases Elevate uses in planning for, executing, and improving its Contractor Accelerator Programs:

1. Market Analysis
2. Program Design
3. Contractor Outreach and Recruitment
4. Contractor Interviews, Selection, and Orientation
5. Contractor Accelerator Implementation
6. Continuous Engagement
7. Program Tracking and Evaluation

For each phase we provide an overview, items to consider, and reference to the tools shared in the Appendix.

Phase I: Market Analysis

There is significant variation from community to community regarding the diversity of contractors, their needs, existing barriers, and support. The first step to creating a local contractor accelerator program is to understand local needs and gaps. Elevate frequently starts by collaborating with stakeholders and potential partners such as community-based organizations, minority groups, and other organizations that sit in, and provide resources and support to residents of under-represented communities. Through these collaborations, we have been able to better understand the landscape and expressed needs of contractors to help support a thriving ecosystem. Additionally, and to ensure that we are designing and implementing programs that align with need, we conduct interviews and collect data to identify specific barriers, challenges, and areas of opportunity. The learnings and data gathered continue to inform our program design and service delivery. For example, we have found that emerging contractors are more likely to attend training sessions outside their typical business hours, and this includes considering the yearly cycle of construction work for your geographical market. In seasonal weather areas, contractors are typically busier in the warmer months, hence they will be more open to attending training sessions in the colder months.

As part of your market analysis, it is also important to assess state and local policies and programs that may present challenges or opportunities for contractors. Research into existing initiatives and programs addressing the needs of under-represented communities is essential to avoid duplication of efforts and to leverage successful models.

Market analysis concludes with a definition of who the program will be designed to reach and how the program will support their needs. Either at the end of market analysis or the beginning of outreach and recruitment, participant eligibility should be determined so that outreach can focus within the priority communities.

To execute this phase of work effectively, a dedicated team is necessary. This team may include a project manager to oversee the implementation, a community outreach liaison or relationship manager to engage with under-represented communities and stakeholders, a coordinator to manage day-to-day operations, and a data/retention specialist to collect, analyze, and maintain relevant information. The programmatic staffing and time required for this phase will depend on the scope of the initiative and the complexity of engagement. Gathering data for the market analysis phase is a critical step that requires a substantial amount of time. The length of time needed will vary based on factors such as the size of the target communities, the extent of existing data sources, and the methodologies employed. A thorough and accurate market analysis forms the foundation for informed decision-making, ensuring that strategies and interventions are tailored to the specific needs and challenges faced by under-represented communities. Contractor development programs may vary in their structure and offerings depending on the specific market. While the core purpose of these programs remains consistent—to support contractors in their business growth and development—the implementation and focus can differ based on regional or industry-specific requirements.

REGIONAL FACTORS WHEN DESIGNING A CONTRACTOR ACCELERATOR PROGRAM

1. Regional Economic Factors: Economic conditions and regional market dynamics play a significant role in shaping the local workforce and business ecosystem. In markets experiencing economic downturns or shifts, contractors may find it difficult to match their skills to the needs of project owners and developers. In this case, the program may emphasize repositioning diverse contractors' skill sets to adapt to changing market needs. As another example of regional economic factors, contractors in some rural areas have shared that access to a skilled workforce is their number one barrier, compared with metropolitan areas where there may be an abundance of construction training pathways creating a pipeline of skilled workers. In this case, the program may partner with workforce development programs to train and connect job seekers to construction industry employers.

2. Legal and Regulatory Environment: Different regions and industries have varying legal and regulatory frameworks that impact contractors. Accelerator programs in these markets may include modules or resources focused on legal compliance, licensing requirements, tax regulations, and other industry-specific regulations. In some markets the availability of programs of diversity and inclusion in construction may provide additional opportunities for funding and work to capitalize on. For example, the City of Madison, WI, has program goals calculated and embedded in the bidding process for all their public and non-public works projects. These goals are based on the availability of diverse contractors (certified throughout the city) and the scope of work to be performed on each individual project.

3. Cultural and Social Factors: The program design may also consider cultural norms and communication styles to effectively engage and support participants. Different diverse communities have diverse needs and finding the right approach through cultural awareness is key to establishing long-lasting meaningful relationships with program participants. Partnering with culturally specific community-based organizations (CBOs) in the design and implementation of programs can be a meaningful way of ensuring authentic engagement in consideration of cultural norms.

4. Access to Funding and Financing: Access to capital and financing options can vary across markets. In some regions, contractor accelerator programs may provide guidance on accessing funding, securing grants or loans, or connecting contractors with potential investors. These programs may also focus on economic management and investment strategies specific to the local market.

5. Government Initiatives and Support: In certain markets, government entities or agencies may collaborate with or provide funding for contractor accelerator programs. These programs may align with government initiatives aimed at promoting diversity, supporting small businesses, or addressing specific market needs.

It is important to note that while there may be variations in the implementation of contractor accelerator programs across markets, the overarching goal remains consistent—to empower and support historically marginalized contractors in their business growth, enhance their skills, and provide them with the necessary resources to succeed in their respective markets.

Phase II: Program Design

After the market analysis phase, the program design can commence. Program design should center on the voices of those most impacted by the program. Consider using an equity lens to evaluate whether program design decisions are inclusive.

PARTICIPANT ELIGIBILITY

Define participant eligibility. There are tradeoffs between broad versus narrow eligibility criteria. For example, broad eligibility criteria may allow more types of contractors to join the cohort. Additionally, broad eligibility may allow a larger group of people to participate and benefit from the program. However, broad eligibility may lead to less depth in the services provided due to the need to serve a diversity of needs, leading to potentially reduced usefulness for each participant. This may be a good fit for programs based in rural areas where the number of contractor businesses may be limited, or for programs that are able to tailor the experience to individual participants based on their circumstances. More specific eligibility criteria may allow program support to be more tailored to the needs of a specific group (e.g., heat pump training for mechanical contractors). This can increase the depth and usefulness of the program. This may, for example, be a good fit for programs where funding requires engagement with specific businesses (e.g., participants of an existing vendor pool) or for programs that intend to support priority populations that have historically been underserved. Eligibility areas to consider include:

- Business size (age, revenue, etc.)
- Business ownership demographics, including race/ethnicity, gender, location, economic class, status as a veteran, etc.
- Business trade or services (solar contractors, mechanical contractors, etc.)
- Market serviced (e.g., residential construction, commercial construction, etc.)
- Enrollment in a program or membership (e.g., businesses enrolled in a particular contractor network)

OUTREACH AND RECRUITMENT PLAN

Create an outreach and recruitment process designed to reach those the program is intending to engage. Casting too small of a net may result in certain groups of eligible contractors to be excluded. Casting too large a net may result in an overwhelming level of interest in the program. Contractors may be disappointed if they become interested but find that they do not meet eligibility criteria, resulting in wasted time spent learning about and applying to the program. For example, in certain markets, municipal, county and state directories of small, minority-, veteran-, or women-owned businesses are a great point of reference to understand where program participants are in the community and what kind of work they do. Reaching out to the local workforce and business development organizations might be another suitable place to start as these organizations will typically hold a database of previous program participants. Local chambers of commerce or small business development centers might be another good point of reference regarding existing businesses within your scope of work.

Create outreach and recruitment materials (flyers, information sessions, applications, etc.) that will resonate with the intended participants. Consider language translation and/or interpretation if the priority population includes individuals for whom English is a second language.

PROGRAMMATIC ENGAGEMENT

Define the process for onboarding contractors onto the program. This may include an orientation, information guide, business assessment, connection with a contractor liaison, and/or participation agreement.

Determine what training and support will be provided to participants and by whom, including the delivery method. Consider your organization and your partners' capacity (staffing, space, etc.). Identify what items will be delivered to the cohort in a group setting and what items will be delivered on a one-on-one basis. Identify who will deliver engagement components. This may include hiring consultants, professional service providers, mentors, subject matter experts, or business coaches. Methods that can be used to deliver support and training include:

- Workshops (e.g., provide technical or industry knowledge)
- Mentorship (e.g., peer mentor and mentee pairing)
- Consulting (e.g., professional services providers deliver consulting on business operational topics, etc.)
- Coaching (e.g., small business coach)
- Access to projects (Enrollment in contractor pool, job shadowing opportunities, or opportunities to bid projects)
- Networking events
- Stipends (e.g., compensation for time spent on the program or funding for individual activities such as certification, training, attending networking events, and more.)

Any of the above items can be delivered in person or virtually, or in a combination, based on your capacity, as well as which methods will be more effective for your target audience. When designing the program, determine how the program will be evaluated and what feedback will be solicited from participants, partners, or other stakeholders. A baseline survey, mid-program survey, and post-program survey can be used to evaluate the impact of the program on participants. Post-workshop surveys can be used to obtain feedback on the content provided.

Phase III: Contractor Outreach and Recruitment

When the Contractor Accelerator program is ready to launch, the program team and partners will begin participant outreach and recruitment. This process identifies potential participants who are business owners in trades that may include general contracting, electrical, heating and cooling, weatherization, and plumbing. Recruiting cohorts with multiple trades represented can build social networks and enable participants to refer and collaborate on projects. Forming a cohort with varying skill sets created an environment where participants can learn from each other and build community. This is essential for growth.

When designing and planning outreach tactics, consider the participant eligibility criteria that were defined per funding requirements and market needs. Tactics may include:

- Partnering with community-based organizations to join recruitment efforts. Successful partnerships may require engaging with organizations early and providing opportunities for organizations to be included in program design and provide program feedback.
- Inviting potential participants and community organizations to attend 60-minute virtual informational sessions to provide an overview of the program and answer questions. Informational sessions are designed for potential participants to gather information about the Contractor Accelerator program so that they can gauge whether it is a good fit for their business. The program team should provide a concise and accurate overview of the program pathway and benefits for participants. There should be no promises to deliver something that is not obtainable. The content should provide realistic expectations of the program and include what will be required by participants (e.g., time commitment). It is important to design the informational session with consideration that individuals may process information differently. For example, a visual learner will process information presented in graphs, charts, and other

diagrams better than information written in sentences. Some individuals prefer to ask questions throughout the informational session and some other individuals would prefer to ask questions at the end. Being able to provide opportunities to increase engagement by being flexible will increase the informational session's impact.

- Attending community events to connect with potential participants. This can provide opportunities to announce the program's launch and share that it is actively recruiting participants.
- Using existing outreach channels that align with participant eligibility. Existing outreach channels may be effective when those channels are built from existing trust-based relationships.

Phase IV: Contractor Interviews, Selection, and Orientation

The application and selection processes are intended to gather information to determine whether a potential participant is a good fit for the program, from the perspective of the potential participant and the program team. During this process, information is flowing bidirectionally between the program and the potential participant. Ideally, the process is not cumbersome but is sufficient to inform a selection decision. This process also serves as the beginning of the business assessment.

The complexity of the application and selection process is dependent on the eligibility criteria. It is also dependent on the services that will be provided because there needs to be an alignment of business needs and services provided. Some tools that can be used during the application and selection process include:

- Online interest or intake form
- Online application form
- Interview/conversation

Questions that should be included on tools above will provide information about the following:

- Basic business profile
- Whether a business meets minimum eligibility requirements
- Whether a business meets preferred business characteristics
- What types of support a business owner is interested in accessing
- Participant capacity to commit to the program

Here is an example of an application and selection process.

1. Contractors attend **Information Session** to learn about the program.
2. Contractors complete a short **Interest Form** that determines if the business meets minimum eligibility requirements.
3. Contractors that meet minimum eligibility requirements are invited to an **Applicant Interview.** Interview questions are designed to provide a deeper understanding of the business's current state, plans for growth, and whether program services would support growth goals. The interview also allows the business owner to learn more about whether the program is a good fit for them and ask questions.
4. The program team implements a **Selection Process** where contractors are selected to participate and invited to the program. Selected contractors are invited to the program Orientation and a full business assessment commences. Contractors that are not selected are provided with other internal or external resources.

The Orientation is intended to level set, reiterate expectations, and get to know each other. Business participants will meet the program team and other businesses participating in their cohort.

Here are some activities and information that can be included in the Orientation:

- Program team and participant introductions
- Overview of the program and benefits
- Syllabus outlining each workshop
- Schedule of activities
- Participation expectations
- Next steps

Interviews and selection begin during and after a designated recruitment period. They are scheduled with the contractor development team when working with a case management party; this process is best done with a case manager. A case manager is someone who knows the community and understands needs, opportunities, and the overall market for this type of programming. A case manager is well-informed in terms of their organizational capabilities and has the skills required to engage, maintain, and grow long-lasting business relationships with program participants and other organizations involved in the Contractor Accelerator programming. Your case manager might be someone who works for a partner organization or works in-house. It will depend on the market and the availability of staff to perform this work. For example, in Wisconsin, which is one of our emerging markets, our case management is provided by our local partner responsible for the execution of the Contractor Accelerator program.

The selection process typically begins with a pre-interview with contractors in which information is gathered from all resources including applications and interviews; once analyzed, the contractor development team will determine eligibility for programming. It is important to establish eligibility criteria beforehand to assess participants' needs and refer to service providers. A contractor that is not ready for an accelerator program might still be eligible for other services or future programming.

The selection and onboarding process should also be viewed as an opportunity to get to know contractors and small businesses and keep them in the pipeline for future or current programming. The data collected from the selection process can be used as a baseline to determine future programming for potential participants and to assess service eligibility for candidates not eligible for current programs.

Finally, you can use the data collected from the selection process to provide contractors not selected to participate in the program with resources matching their current needs. For example, providing referrals to community-based organizations that provide small business resources, trade organizations, or small business administration programs might be the best approach in guiding contractors to future eligibility for accelerator programs.

Phase V: Contractor Accelerator Implementation

ASSESSMENT TOOL AND RELATED RESOURCES: THE CONTRACTOR GROWTH PLAN

The Contractor Accelerator may consist of group workshops and individual services. After the initial business assessment, individual services and support can be customized based on each business's goals and priorities. Each participant should be assigned a program team point of contact (i.e., “Navigator”) to guide them through the accelerator process.

Timeline for delivery: 8—10 weeks (about 2-and-a-half months); Consider that contractors’ schedules may vary, especially during the busy construction season in the summertime. It is most appropriate to run a full contractor accelerator in the wintertime and during 4th quarter (Oct., Nov., Dec.) or in 1st quarter (Jan., Feb., March). For example, over a 10-week program, workshops may be held every other Tuesday for 1 hour and 30 mins and in the evening. Questions on these topics should be incorporated into the Market Analysis phase.

Team Staffing

Elevate has found the following program staffing levels to be effective in implementation:

One Project Manager, one Support Person, and one Coordinator—considering that they are only servicing about five contractors at one time. Consider partner staff availability when collaborating with other organizations.

Workshops

Group workshops may be delivered in person or virtually. For visuals, a PowerPoint presentation or props are recommended. For virtual workshops, consider recording and providing the recording to contractors so that they can refer to the training sessions. Examples of group workshop topics include:

- Overview of the clean energy economy and emerging trends.
- A specific clean energy economy topic such as electrification, healthy homes, or electrical vehicle charging stations.
- Overview of energy efficiency rebates, incentives, or other project funding opportunities.
- Trade-specific training related to a specific technology (e.g., ductless heat pumps or solar photovoltaics). This could focus on the technical skills to install the technology or information about how to educate customers about the technology.

Individual Services

One-on-one business support services may be delivered in person or virtually. Examples of individual support services may include:

- Consulting from a human resources professional, financial consultant or accountant, business tax professional, or legal professional
- Graphic design and branding consulting
- Minority Certification assistance (WBE/MBE/DBE)
- Assistance with becoming an approved vendor for local or national programs
- Energy Efficiency Installer Certification (ICC)

Phase VI: Continuous Engagement

Continuous contractor engagement follows the accelerator cohort and is designed to support contractors and the partners that deliver programming to support the clean energy market more broadly. Contractor engagement objectives set important benchmarks which you can use to measure progress. A good example would be preparing a contractor for a specific project/program, i.e., Healthy Homes, Lead Care Complete, Emergency Furnace Program, etc.

To support program participants in continuing their business growth, organizations should plan to do follow-up communication with program participants to collect and analyze data about their business development. Collecting this data will allow organizations to identify business development growth points, improve collaboration with partners and clients, and improve quality of services.

Growth tracking should be carried out through surveys sent periodically to contractors after they have participated in the contractor accelerator program. Project managers should be the point of contact for surveying and collecting the data required for this process. This process requires staff to create, organize, and collaborate in the presentations of data and periodic results.

Phase VII: Program Tracking and Evaluation

KEY PERFORMANCE AND EVALUATION FACTORS

To effectively evaluate the Contractor Accelerator program, it is important to identify program objectives and Key Performance Indicators (KPIs) at the program design stage. Determine what information gathered will be anonymized, kept confidential with the program team, and be transparent with participants. Consider what participant business growth or change is anticipated or desired. This may include the following examples:

1. Change in business size (revenue, number of employees, number of projects)
2. Change in business services offered (shift to clean energy economy)
3. Increased participation (more diverse businesses in a vendor pool)

To measure change, participants can complete a baseline survey prior to program engagement and a post-program survey (or series of surveys) to measure perceived changes.

In addition, programs can track metrics of program engagement such as workshop attendance, participant demographics, etc.

Program evaluation can also help to identify areas of improvement for the program. This can be accomplished by implementing surveys about individual program components to gather feedback from participants. For example, short surveys directly after workshops allow the program team to gather feedback quickly without much time burden on participants.

It is important to keep in mind that sustainable growth for businesses will take time. This is why it is important to design continuous engagement into programs. Consider surveying participants annually post-program. This process is best done by standardized tools, for example an online survey, created to collect quantitative and qualitative data on contractor growth.

POST-PROGRAM TRACKING

It is recommended to engage in post-program tracking to grow partnership with emerging enterprises after they have participated in contractor accelerators. Periodically engage in surveying the long-term growth of their business.

Below is a clear outline of how this process is addressed.

Table 1.

Process	Purpose	Timeline	Type of Tracking
Growth Plan	Collect initial business information on growth pathway	Pre-program participation	Fixed (filled out and finished upon data entry)
Program Participation Quality Assurance	Measure contractor perception on the quality of contractor accelerator programs delivered	During contractor accelerator participation	Hybrid (living throughout contractor accelerator participation and fixed upon program completion)
Post-program Tracking	Measure contractor long-term growth post-program participation	Post-contractor accelerator program participation	Living (receives continuous updates for undetermined number of years)

ASSESSING YOUR WORK FROM THE WHY

The lessons learned process described below will help determine the areas of growth for your contractor accelerator program. The intersections presented between work areas and the errors in your program will affect the success of your accelerators. To provide clear and concise data on the phases of your program and project management, it is paramount to capture quantitative and qualitative data. Data collection and analysis will help you to strengthen your programs through process mapping and implementation of standards. In the process, you might see an increase in planning time for your projects that will pay off over time as projects are implemented through standard operating procedures. As a result of this analysis, you will begin training for more robust implementation of project planning and active tracking of project deliverables with emphasis on case management.

Why do you need a clearly defined project plan?

Having a clearly defined project plan focused on deliverables, evaluation, and metrics is fundamental for the continuity of your operations. Some key items such as work breakdown schedule, slack, risk management, time, and cost estimations are paramount components for our future projects.

Why do you need program tracking?

As you are planning your projects, you will implement tracking to monitor participant attendance and progress, frequency and reach of communications with partners and trainees, activity times and duration as well as costs and aggregated budget disbursements.

Why do you need clean data collection?

Monitoring of your deliverables through standardized tracking tools will allow to collect data in systemic fashion and thus save time otherwise invested when standardized tracking of deliverables and service for quantitative and qualitative variables is not applied.

Why do you need to analyze lessons learned?

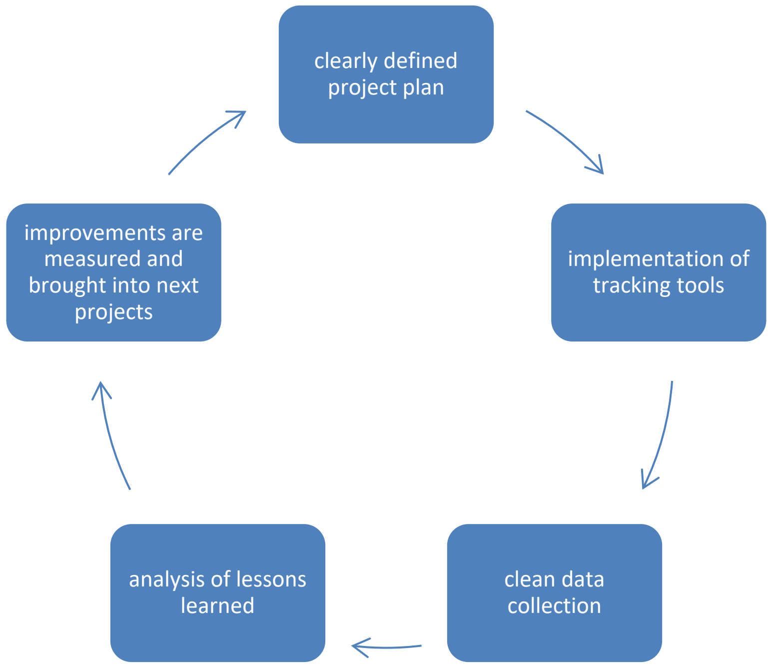
When clean and standardized data is collected and analyzed through the lens of lessons learned, you are carrying out key learning components resulting from your best practices and standards for project management.

Why do you need improvements measured and brought into the next projects?

Lessons learned data will allow you to assess and measure your standards and processes and thus resulting in better planning, implementation, and impact of subsequent projects.

THE LESSONS LEARNED PROCESS

The image on the next page describes the iterative process of implementing a program, tracking evaluating, and making changes to continually improve your program and its outcomes for contractor participants.



Appendix: Contractor Growth Plan Guide

Summary

The Contractor Growth Plan is a tool designed to support business expansion through the analysis of needs and goals. It contains a snapshot of a business's current state and explores opportunities to expand capabilities, increase business revenue, and provide ongoing support. This tool is especially useful to understand the cohort's needs, and to broaden the reach and impact of contractor development programs. Understanding the baseline data of your program participants will help establish partnerships with industry experts and associations to collaborate to develop contractors by providing additional resources and leveraging their strengths and opportunities. Elevate's goal through the implementation of a Growth Plan is to foster business development and diversification of services to match market needs. If the Contractor Accelerator program participant operates in a specific region or city, a Growth Plan may involve expanding into new geographic areas. This expansion can involve analyzing the needs and opportunities of the target market. In various locations, we work on partnering with local organizations to establish business relationships to support program participants. By expanding our program's footprint, more contractors can benefit from the resources and support offered.

As the needs of participants are analyzed, you will be working on diversifying their business capabilities to expand to available markets and business areas. This involves identifying emerging trends, new skills and upskill requirements in electric and solar energy, or niche markets. By sustaining relationships through continuous engagement and the execution of the Growth Plan, a wide range of business possibilities are developed through the program which attracts more contractors with diverse needs and expertise, ensuring relevance and effectiveness.

Introduction

This document contains multiple components intended to (1) provide an in-depth assessment of a business, (2) facilitate conversation and introspection, and (3) assist in the development and implementation of an action plan. The first section contains information about a business that can be collected during a program's application phase. The second section contains questions and responses that are covered in a growth plan conversation. The third section is a SWOT (Strengths, Weakness, Opportunities and Threats) analysis template intended for a contractor to complete individually or with a business coach. The last section outlines a business's goals in an action plan and provides a space to document notes from on-going action plan check-ins.

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Business Information

This information can be collected in the program application phase.

1. Business name

2. DBA (doing business as), if applicable?

3. Contact first name

4. Contact last name

5. Contact email address

6. Contact phone number

7. What is your preferred contact method (i.e., email or phone)?

8. Is there another contact you would like us to have at your company? If yes, please provide their name, email, and phone number.
    - ☐ Yes
    - ☐ No

9. Business address
    a. Address
    b. City/Town
    c. State/Province
    d. ZIP/Postal Code

10. Please provide a brief description of your business.

11. Business website

12. Business diversity certification status (select all that apply)

- ☐ Eligible as a Minority Business Enterprise (MBE)
- ☐ Eligible as a Woman Business Enterprise (WBE)
- ☐ Eligible as a Veteran Business Enterprise (VBE)
- ☐ Eligible as a Disadvantaged Business Enterprise (DBE)
- ☐ Certified as a Minority Business Enterprise (MBE)
- ☐ Certified as a Woman Business Enterprise (WBE)
- ☐ Certified as a Veteran Business Enterprise (VBE)
- ☐ Certified as a Disadvantaged Business Enterprise (DBE)
- ☐ Not certified nor eligible for any diversity certification
- ☐ I do not know
- ☐ Other

13. Please list certification number(s), if applicable.

14. **Do you have experience with Prevailing Wage and/or the Davis-Bacon Act?**

15. **What are the primary trades that your business performs (select all that apply)**

- ☐ Health and Safety – Asbestos/mold and bulk moisture abatement/mitigation
- ☐ Health and Safety – Roof replace/repair
- ☐ Health and Safety – Foundation repair
- ☐ Health and Safety – Carpentry
- ☐ Health and Safety – Accessibility
- ☐ Health and Safety –Electrical repairs
- ☐ Weatherization – Insulation and Air Sealing
- ☐ Plumbing/DHW
- ☐ Heating, ventilation, cooling systems and smart thermostats (HVAC (Heating, ventilation, and cooling))
- ☐ Lighting and sensors
- ☐ Appliances (window Air Conditioning, refrigerators, stove)
- ☐ Repair/replace Windows/Doors/Miscellaneous Carpentry (i.e., windows and doors)
- ☐ Heat Pump
- ☐ Solar
- ☐ Distributor/Vendor
- ☐ General Contractor
- ☐ Other

16. **How many people do you employ?**

a. Field installers:
b. Office staff:
c. Sales staff:

17. Do you have experience working in the following types of buildings? (select all that apply)

- ☐ Single Family Residential – New Construction
- ☐ Single Family Residential – Retrofit
- ☐ Small Multifamily (2-4 Units) – New Construction
- ☐ Small Multifamily (2-4 Units) – Retrofit
- ☐ Multifamily – New Construction
- ☐ Multifamily – Retrofit
- ☐ Commercial – New Construction
- ☐ Commercial – Retrofit
- ☐ Municipal – New Construction
- ☐ Municipal – Retrofit

18. If you selected retrofit above, what are the top building types of your company serves? (select all that apply)
    - ☐ Apartments (3-34 units)
    - ☐ Apartments (35+ units)
    - ☐ Senior and Assisted Living Facilities
    - ☐ Mixed-Use Buildings
    - ☐ Condominiums
    - ☐ Other

19. Have you had any previous energy efficiency program participation?

20. What professional/industry certifications do you hold and how long have you been certified for each? Registered Electrical Contractor, HVAC – Residential/Commercial, etc.

21. Do you currently have the following insurances in place? (select all that apply)
    - ☐ General Liability
    - ☐ Worker's Compensation
    - ☐ Auto insurance that covers hired AND non-owned autos

22. How long has your company conducted business under your current company name? (select one)
    - ☐ 0-1 years
    - ☐ 1-3 years
    - ☐ 3-5 years
    - ☐ 5-10 years
    - ☐ 10-25 years
    - ☐ More than 25 years

23. Is your company currently conducting business in the [utility company] territory? (select one)
    - ☐ Yes
    - ☐ No
    - ☐ Not sure

24. Do you hire subcontractors? If yes, how many different subcontractors do you work with?
    - ☐ Yes
    - ☐ No

25. Does your company represent third-party equipment manufacturers, distributors, installers, or contractors? If yes, please describe your company's affiliation with specific equipment manufacturers and/or products and include specific companies or brand names.
    - ☐ Yes
    - ☐ No

26. What counties do you serve?

27. How many projects has your company completed with utility energy efficiency programs in the past 3 years?
    - ☐ 0
    - ☐ 1
    - ☐ 2-5
    - ☐ 5-10
    - ☐ 10-25
    - ☐ 25-50
    - ☐ More than 50

28. Is your company an active [utility company] Service Provider?
    - ☐ Yes
    - ☐ No

29. What is your capacity to participate in a program like this? About how many hours per week you would be able to spend at your computer, working on your business operations (e.g., working with an accountant, estimator, or working on bids, books, etc.)

30. Do you have any questions or feedback for us? Have you participated in programs like this before? What worked for you and what did not work well?

Growth Plan Discussion

INTRODUCTION:

Thank you again for your interest in participating in the [contractor accelerator name]. Throughout this discussion we will be asking questions about your business operations and the systems and tools you have in place for your business.

The information discussed today is confidential and your feedback will be used to help develop a plan of action that will be shared with you after the session – your honest responses to the questions are appreciated and will lead to a more beneficial action plan. Your action plan will highlight potential opportunities, support needs, along with available resources and timing. A follow-up discussion will be scheduled with you to review the action plan.

Please feel free to ask any questions along the way.

ICEBREAKER QUESTIONS – WHY ENERGY EFFICIENCY

Question	Response
What does energy efficiency mean to you?	
Why do you want to grow your business in energy efficiency? How does it align with your expertise and interests?	

BUSINESS OPERATIONS

The following questions are focused on better understanding your business operations, including workforce, financial management, and project management.

Workforce

Question	Response
Tell us about your staff and their roles. Do you have anyone who assists you with business operations? Who oversees the job site?	
Do you have potential employee candidates, or a recruiting plan established to add to resources?	
What training do you provide staff to support high-quality installations?	

Financial Management

Question	Response
What accounting, bookkeeping, and invoicing software or system do you use? Are there any improvements you would like to make to this process?	
How do you prepare and file your taxes? Are there any improvements you would like to make to this process?	
How does cashflow impact your business operations or decisions to take on projects? How would you like this to change, if at all?	
How have you financed your business? If you have considered applying for capital, what has been your experience, and have you received any feedback from lenders?	

Project Management

Question	Response
How do you currently bid on construction projects? What tools do you use for job costing, estimating, and creating a bid proposal? Are there any improvements you would like to make to this process?	
What software or system do you use for scheduling projects? Are there any improvements you would like to make to this process?	
How many projects can you manage in one month's time? Do you plan to increase your capacity to take on additional work?	
What percentage of your work is currently self-performed? What percentage is subcontracted? What scopes are self-performed and what scopes are subcontracted? Do you plan to make any changes to this?	
How do you manage and oversee the quality of your projects? How do you ensure work is performed correctly? Are there any improvements you would like to make to this process?	

CUSTOMER ACQUISITION AND MARKETING

The following questions inquire about your customers, how you market your firm and obtain customers.

Customers

Question	Response
What types of projects have you been bidding on and working on lately?	
Who is your ideal customer and why?	Building Type: Size of Project: Geography: Scope:
What market(s) are you focusing on? Are you currently working in the markets you would like to be working in?	
What is your service territory? What is the average distance you prefer to travel to a job site? What is the furthest you will travel?	

Marketing and Customer Acquisition

Question	Response
How do you currently communicate with your customers and potential customers?	
How do you keep track of requests and inquiries and how quickly do you respond to customers? Are there any improvements you would like to make to this process?	
Which social media do you use for your business (if at all)? Do you have customer reviews online?	
How do customers find you? How do you instill confidence in your work?	
How much financial and/or human resources does customer acquisition cost your business?	

WRAP UP

Question	Response
What are your goals for this year and beyond? What do you anticipate will be some of the main challenges in reaching those goals?	
What goals do you want to be included in your action plan?	

Let the contractor know that you will be following up with an action plan that includes a summary of the discussion today along with the next steps and available support.

Work with the contractor during this time to schedule another check-in, appropriately two weeks out. That will provide a week to get the plan out and one week for the contractor to review it prior to your next engagement. Complete the table in the Action Plan below.

SWOT Analysis

STRENGTHS, WEAKNESS, OPPORTUNITIES AND THREATS ANALYSIS (SWOT):

This exercise will focus on identifying your business' successes and strengths, growth opportunities within the market and challenges or barriers for your business. Reflect on the questions in each section below to complete the SWOT matrix.

Business successes and strengths (Strengths)

1. What is the unique value proposition you bring to your customers? What makes your company stand out amongst the competition?
2. What competitive advantages do you have over your competition?
3. What assets do you have in your teams? (i.e., knowledge, education, network, skills, and reputation)
4. What physical assets do you have, such as customers, equipment, technology, and cash?

Opportunities for growth (Weaknesses)

1. Are there things that your business needs to be competitive?
2. What business processes need improvement?
3. Are there tangible assets that your company needs, such as money or equipment?
4. How often do you lose a bid to another firm and why?
5. Do you know where to go to find bids and projects?
6. Are there gaps on your team?
7. Is your location ideal for your success?

Market opportunities (Opportunities)

1. Which areas of your business would you like to grow in? Where have you seen success that you would like to build on?
2. Do your customers ever ask for services that you are not currently providing? Would you be willing to provide those services?
3. How does energy efficiency align with your expertise and interests?

Market Challenges and/or Barriers (Threats)

1. Do you know of other businesses selling the same product/service as you? What do they have that you do not?
2. Has cash flow ever been an issue, what resources do you have to deal with a hard month?
3. What do you see as the biggest challenges for your business right now? What about in the next 1-3 years?
4. Do you have an idea of what it will take to build energy efficiency into your business model? What are your expectations?

Complete the SWOT matrix below.

Businesses successes and strengths (Strengths)	Opportunities for growth (Weaknesses)
Market opportunities (Opportunities)	Market Challenges and/or Barriers (Threats)

Action Plan

This document lists our shared action items for your business growth. It includes standard action items we are prepared to deliver through the [contractor accelerator name], and room to add custom goals you want to achieve.

Identified item	Program team role	Your role	Priority/your availability	Goal for completion (short term or long term)
Goal 1				

ACKNOWLEDGEMENT

The contractor certifies that all the information included in this growth plan is true and correct, and if at any time the information in this growth plan changes, the contractor will notify [contractor accelerator name] program team within a reasonable time.

Print name

Signature Date

ACTION PLAN CHECK-IN SCHEDULE AND NOTES

Date of 1st 1:1 Meeting: ________

Results:

____

Date of 2nd 1:1 Meeting: ________

Results:

____

Date of 3rd 1:1 Meeting: ________

Results:

____

For more information about Communities LEAP, visit: energy.gov/CommunitiesLEAP

Subcontract Report
DOE/GO-102023-6096 • November 2023