

Installer Application Guidelines for Energy Trust Business Lighting Small Business Direct Install (SBDI)

Section 1: Overview

Energy Trust is an independent nonprofit organization dedicated to energy efficiency and renewable power development.

CLEAResult is the program delivery contractor responsible for providing Energy Trust's Small Business Direct Install delivery and incentives to customers of Portland General Electric and Pacific Power in Oregon. The offer provides no-cost lighting upgrades to eligible small commercial, industrial, and multifamily customers.

CLEAResult is accepting applications from lighting installation contractors across Energy Trust territory who are interested in participating in SBDI. Selected applicants will be contracted with CLEAResult to:

- Order approved materials off the program's Qualified Product List (QPL) according to project work orders.
- Install approved lighting and lighting controls measures.

Reimbursement for fixed installation costs will be paid by CLEAResult. Pricing includes labor and other costs that have been set to allow for a cost-effective program delivery.

Installer enrollment is limited. Qualified applicants in areas without openings will be kept in a waiting pool and contacted when openings become available.

Section 2: Required and Preferred Qualifications

Applicants must meet all required qualifications to be considered for enrollment. If the number of qualifying applications in a region exceeds the number of open spots, preferred qualifications criteria will be used to apply a score to each applicant. Higher scoring application(s) will be selected to fill open spots, and lower scoring application(s) will be placed in a waiting pool. Applicants who do not meet all required criteria do not qualify and will not be considered for enrollment.

Required Qualifications:

- Enrolled Energy Trust Business Lighting trade ally or contractor capable of meeting [Energy Trust's requirements to become an enrolled Business Lighting trade ally](#) by the time installations begin.
- Must have a physical location established in a trade ally region and can only be enrolled in a single region. [A map of Energy Trust trade ally regions can be found here.](#)
- Relevant business and electrical licenses for performing lighting retrofit work.

- Experience installing lighting equipment in commercial and/or industrial retrofit applications.
- Installation team must be direct employee(s) of the installation contractor company.
- Enrolled Energy Trust trade allies must be in good standing with no active customer complaints or project verification issues.

Preferred Qualifications:

- Employment of Limited Maintenance Electricians for basic lighting installations is highly encouraged to meet the program's cost-effectiveness requirements.
- Five or more years as an enrolled Energy Trust Business Lighting Trade Ally in good standing.
- Employment of multilingual staff.
- Business located exclusively in one of the following [regions](#):
 - North Coast (Region 1)
 - South Coast (Region 2)
 - Columbia Basin (Region 7)
 - Klamath Basin (Region 9)
 - Northeastern Oregon (Region 10)
- A small business certified by a recognized certification program from a federal, state or other formal certifying entity, or certification eligible. (e.g. COBID, SBA):
 - Section four explains the reasoning for this preferred qualification along with a list of accepted certifications and issuing entities.
 - If you hold or are eligible for a certification from an entity not listed in section four, please include that information in your application.
- Customer references demonstrating strong customer service and consistent project results.
- Experience working with small agricultural producers and Tribal Communities

Section 3: Description of Work

CLEAResult Roles and Responsibilities

- Perform sales and outreach activities, provide installation contractors qualified projects ready for installation within that installation contractor's identified territory.
- Maintain the Qualified Product List (QPL), which includes:
 - Negotiating preferred pricing with manufacturers.
 - Approving products offered through distributors.
- Provide a copy of the individual project work order to the installation contractor.
- Reimburse project costs.

Installation Contractor Roles and Responsibilities

Selected contractors will be responsible for adhering to offer participation requirements. The general scope is limited to the installation of a specific set of lighting and lighting controls

equipment at prequalified/audited facilities that will be provided to the contractor. Specific installation contractor requirements include but are not limited to:

Materials and other costs

- Purchasing and acquiring all materials used to deliver the offer and complete project installation.
- Incidental materials required to complete the installation of lamps, fixtures and ballasts must be provided by the installation contractor. This includes materials such as wire, conduit, hangers, and tombstones, which have been accounted for in the measure installation prices.
- Additional costs including aerial lifts, permits and recycling will be the responsibility of the installation contractor.
- Costs such as code requirements, asbestos removal, and others outlined in program orientation materials will not be covered by the offer.

Scheduling

- Schedule the installation of the project with the customer.
- Coordinate the delivery or pickup of materials for the project.
- Manage the availability, rental and/or delivery of any necessary aerial lifts required to complete the project.
- Contact the program if any issues arise during installation scheduling or materials ordering. Issues can include non-responsive customers or materials backorders.

Installation

- Complete the project within 90-days of the signed participation agreement.
- Contractor will be required to complete all work in compliance with all local or national electrical codes, laws and requirements including, but not limited to:
 - Obtaining required permits
 - Recycling any required material from the jobsite
- General cleanliness and professionalism on the job site is required.
- Adherence to any site-specific safety requirements.
- Completed projects are subject to work quality and accuracy verification inspections by CLEAResult staff.

Section 4: Certifications and Issuing Entities

Energy Trust is committed to serving all customers and advancing equitable access for any business that may experience challenges in receiving program benefits, including but not limited to businesses owned or led by people who are Black, Native American or Alaska Native, Latinx, Asian or Pacific Islander, Middle Eastern, those who identify as women, and businesses located in rural areas. Diversifying the trade ally network is a key approach to better serving priority customers.

Oregon Certification Office for Business Inclusion and Diversity (COBID) certifications:

- Minority Business Enterprise (MBE)

- Women Business Enterprise (WBE)
- Service-Disabled Veteran Business Enterprise (SDVBE)
- Emerging Small Business (ESB)
- Veteran Business Enterprise (VBE)
- Business Oregon Small Business Certification:
- Oregon Small Business Enterprise (OSBE)

Federal contracting assistant program benefits or certifications managed by the U.S. Small Business Administration (SBA):

- Small Disadvantaged Business (SDB)
- Women-Owned Small Business (WOSB)
- Economically Disadvantaged Women-Owned Small Business (EDWOSB)
- 8(a) Business Development program
- Veteran-Owned Small Business (VOSB)
- Service-Disabled Veteran-Owned Small Business (SDVOSB)
- Historically Underutilized Business Zone (HUBZone)

Other recognized certifications and certifying entities:

- Washington State Office of Minority and Women's Business Enterprises (OMWBE)
- Supplier Clearinghouse (California Office of Public Utilities Commission)
- National Minority Supplier Development Council (NMSDC)
- National LGBT Chamber of Commerce
- Disability-owned Small Business (Disability:IN)
- Women's Business Enterprise National Council (WBENC)