

# Request for Proposals: RFP #51699



## Market Acquisition Opportunity: NXT Level Lighting Training Program

### 1 Background

#### **Purpose of this RFP**

NEEA ultimately seeks to transfer and divest its NXT Level lighting training and designation program (also referred to as the “NXT Level program”, or “program”) to an organization or business (hereafter, “selected partner”) prepared to deliver NXT Level long-term. In the near- to medium-term, NEEA may grant the selected partner a license to administer the program to ensure continued delivery throughout the Northwest (Idaho, Montana, Oregon and Washington) with the opportunity to expand and monetize the program beyond its current scale. Given the unique nature of this market acquisition opportunity, NEEA is offering several *optional* avenues for interested parties to learn more, prior to submitting formal proposals. These include: i) an informational webinar on NXT Level and this RFP, open to all interested parties<sup>1</sup>, ii) a rolling Q&A period, and iii) individual informational webinars to informally discuss, one-on-one with NEEA, the range of possible approaches for a partner to license and/or acquire NXT Level.

#### **What is NXT Level?**

NXT Level is the market-facing lighting training and designation program built by NEEA with the objectives of i) developing capacity of trade allies (contractors, installers and other market actors) to design, sell and install advanced lighting retrofits and ii) creating a designation and market differentiation of qualified top tier allies for use by utility programs and other market actors. Since the program’s launch in 2016, NXT Level has established a strong network of skilled allies in the Northwest. To date, over 707 individuals have participated in NXT Level to some degree. Of these, 332 individuals have earned NXT Level 1 designation, 78 individuals have earned NXT Level 2 designation, and the remaining qualified participants are in-progress.

#### **Why is NEEA seeking a partner to acquire NXT Level?**

Now that NXT Level is well established in the Northwest market, NEEA seeks to divest NXT Level to a partner organization to manage long term delivery and development of NXT Level. NEEA has divested and transferred ownership of similar infrastructure programs originally developed by NEEA, for example RETA CRES<sup>2</sup>

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<sup>1</sup> Please see Section 6.1, “RFP Schedule” for details and a link to register.

<sup>2</sup> The Certified Refrigeration Energy Specialist (CRES) certification was developed in partnership with and is now managed by the Refrigerating Engineers & Technicians Association (RETA).

and BOC<sup>3</sup>, to a partner in the market. For the transfer of NXT Level, NEEA seeks a partner who can integrate NXT Level into their organization in a way as to i) make the program financially self-sustaining over time, ii) grow the network and influence of NXT Level, and iii) support ongoing lighting market transformation efforts in the Northwest and potentially beyond.

### **More about NXT Level and Current Utilization in the Northwest**

NXT Level offers two tiers of training, each with a corresponding designation. The first tier, NXT Level 1, includes seven online, on-demand training courses totaling 12 hours of content as well as an exam to test knowledge. The curriculum provides deep coverage of lighting concepts, technologies, economics, sales techniques (through non-energy benefits), codes, and understanding of utility programs. Trade allies who pass the exam (or qualify through an alternative path<sup>4</sup>) earn the NXT Level 1 designation, which is designed to differentiate these trade allies from the contractor market at large. To date, since launch in 2016, 332 individuals have earned the NXT Level 1 designation.

The second tier of training, NXT Level 2, is available to NXT Level 1 designees. NXT Level 2 is a four-part course that combines live webinar training, on-demand coursework, and field work. Level 2 instruction goes deeper into LED and advanced controls systems and offers focused training in three different areas of specialization: project development, design specification, and installation and setup. Participants select and complete at least one area of specialization in order to earn designation. To date, since launch in late 2018, 78 total individuals have earned the NXT Level 2 designation.

NEEA can provide complimentary access to the NXT Level curriculum for any interested parties. Access will expire at the close of this RFP process.

NXT Level is currently available to individuals in the Northwest and offers designations both to individuals and companies who participate in Northwest utility programs. Companies provide project referrals as part of their application and appear on the designation list<sup>5</sup> along with the Northwest utility service territories they serve. Some Northwest utilities point to this external designation list in lieu of maintaining their own vetted list of contractors. Other Northwest utilities distinguish NXT Level designees among their own list of contractors, provide designees preferential ranking, and/or include NXT Level designation as an eligibility requirement for certain program opportunities.

There is currently no charge for the training, but the selected partner may choose to make their delivery model fee based.

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<sup>3</sup> The Building Operator Certification (BOC) was developed in partnership with and is now managed by the Northwest Energy Efficiency Council (NEEC).

<sup>4</sup> Applicants who are LC, CLEP and/or CLMC certified can earn NXT Level 1 designation automatically once their application is approved and a short survey is completed. The pathways to achieve designation are detailed at <https://nxtleveltraining.com/about-nxt-level/individual-designation/>.

<sup>5</sup> See Section 5, "Definitions and Applicable Documents" for a description of the designation list. Designation list is posted on the NXT Level website at <https://nxtleveltraining.com/nxt-level-designated-companies/>.

Please see Section 4, Program Implementation Activities and Assets, for an outline of current delivery and promotion activities. For a full list of current NXT Level assets, see Appendix C. See also Section 5, Definitions and Applicable Documents, for additional information and resources.

## 2 Objectives

NEEA seeks to divest NXT Level to a partner organization to manage long term delivery and development of NXT Level. To this end, NEEA seeks a partner who can demonstrate the following:

- Ability to deliver NXT Level training and designation in the Northwest market in a financially self-sustaining way. This may include strategies to scale, expand and/or monetize the program.
- Ability to scale delivery of NXT Level beyond the Northwest market is not required, but welcome, and may be an enabling strategy for financial self-sufficiency.
- Ability and interest to invest in future curriculum updates and development to respond to changing market needs and maintain the value and relevance of NXT Level over time.
- Willingness to collaborate with NEEA in some respects, such as sharing of participation data and curriculum development (at a minimum in the near and medium term).
- Ability to reach beyond lighting and electrical contractors and credibly offer training that extends to other networked building systems is preferred.

## 3 Approach

NEEA is prepared to begin transfer and divestment of NXT Level to a selected partner as early as Q3 2021. The transfer would then likely take place over three stages:

### Stage I. Near-term Transition

- Over an agreed upon transition period (i.e. 3-9 months), NEEA may enter into a services or license agreement with the selected partner to facilitate transition of the program and support the selected partner in integrating NXT Level into their organization.
- A successful transition will minimize disruption to current participants and Northwest utility programs, and position the selected partner for success in delivering NXT Level to the market long-term.

### Stage II. Medium-term Delivery and Development

- After the initial transition period, the selected partner will have full delivery and development responsibility.

- In the medium-term (i.e. 2-3 years), this may take the form of a license agreement to expand and monetize the program beyond its current scale while ensuring continued delivery in the Northwest.

#### Stage III. Long-term Delivery and Development

- In the long-term, NEEA and the selected partner may enter into a longer-term license agreement or agree to transfer full ownership rights for the NXT Level program to the selected partner.

Bidders are asked to consider NXT Level's assets<sup>6</sup>, current market adoption, and the objectives laid out in this RFP, and propose an approach for the above stages of transfer of the NXT Level training and designation program. The approach shall include description of any expansion plans, changes in the delivery model, or other business strategies to meet the objectives.

NEEA expects proposed approaches to vary depending on an organization's current programs, products and/or services, financial assets, business practices, capacity, and other factors, and welcomes innovative approaches. However, the approach must meet the following requirements for the near to medium term at a minimum:

- Selected partner will continue to deliver NXT Level training and designation in the Northwest market. At a minimum, this will require:
  - NXT Level 1 training and designation is available to lighting professionals in the Northwest; NXT Level 2 training and designation is available for NXT Level 1 designees.
  - Any proposed changes to NXT Level 1 or 2 designation requirements in the Northwest are first reviewed and approved by NEEA
  - A public designation list is maintained for use by utility programs
- Selected partner will continue to gather data or information from NXT Level participants to inform NEEA activities and Northwest utility programs, including reports on the progress of the training and designation program.
- Ensure that NXT Level training offerings evolve based on market needs, and that NEEA has a voice in curriculum development or review.

Approaches which also achieve the following are encouraged, but not required:

- Scale, integrate, and/or monetize NXT Level in a way that enables no- or low-cost delivery for utility programs in the Northwest.
- Continue to build market awareness of the NXT Level program among building owners and managers and facility managers to continue to create value for designees.
- Expand reach of the training and designation program beyond lighting and electrical contractors and credibly offer training that extends to other networked building systems.

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<sup>6</sup> Please see Section 4, Program Implementation Activities and Assets, for an outline of current delivery and promotion activities. For a full list of program assets, see Appendix C.

Below are two scenarios to illustrate possible medium to long-term program delivery models. NEEA welcomes innovative proposals and looks forward to discussing other possible approaches.

#### Scenario 1

- NXT Level scales nationally and is administered online and on-demand.
- Account relationships with utilities in the Northwest and nationally are developed and/or leveraged in order to continue to build demand for the NXT Level designation.
- Fee revenue from scaling to other regions is used to fund scholarships and waivers for participants in the Northwest for a period of time; possible membership structure for utilities.
- NXT Level 3 training and designation rolls out; utilizes curriculum already in development (either by the selected partner, NEEA, or another organization).

#### Scenario 2

- NXT Level retains a Northwest delivery focus but may scale to other regions opportunistically; majority of current implementation activities and assets are retained.
- Develop and/or leverage relationships with Northwest utilities as key accounts; may leverage or develop relationships with utilities in other regions opportunistically.
- Fee revenue for NXT Level 2 and higher levels of training is used to continue to offer NXT Level 1 at no cost. Possible membership for Northwest utilities whereby they can offer all NXT Level and other training offerings at no cost to their trade allies.
- NXT Level 3 offers a higher designation – through newly developed NXT Level curriculum or an equivalency training.

### **3.1 Potential Licensing Fees**

NEEA expects to negotiate both a transition plan and licensing terms with the selected partner to fit mutual organizational and business needs. At NEEA's discretion, NEEA may assess a license fee. The license fee will be determined based on the details of the selected partner's proposal, including but not limited to:

- The timeline, including proposed start and duration of Stages I and II
- The cost estimate, and what costs NEEA may incur in the near term to facilitate transition of the program and support the selected partner in integrating NXT Level into their organization
- The proposed approach, and if/how the selected partner proposes to scale delivery beyond the Northwest

## **4 Program Implementation Activities and Assets**

Current implementation of NXT Level in the Northwest focuses on the following delivery and promotional activities, approaches, systems and assets. These are listed to provide additional context on NXT Level operations as they are currently managed.

The selected partner has the option to adopt and leverage these activities and assets, but may also propose alternative approaches to program delivery consistent with NEEA objectives.

Note that NXT Level curriculum is currently delivered via Docebo, a cloud-based LMS. Optionally, the curriculum, user accounts and other assets may be transitioned to a new LMS.

For a full list of NXT Level assets, including further details and samples of those listed below, see Appendix C.

- Training and Designation Delivery:
  - Maintain [NXT Level website](#)
  - Act as main point of contact for participants. Manage NXT Level email, [info@nxtleveltraining.com](mailto:info@nxtleveltraining.com)
  - Manage participation in NXT Level 1 and 2. Includes enrollment, assigning curriculum, awarding designation, and monitoring redesignation.
  - Deliver select training modules via live webinar events. Note that select modules of NXT Level 2 are designed to be delivered via live webinar, whereas other NXT Level 2 and all NXT Level 1 modules are available on-demand.
  - Maintain current curriculum and delivery methods. Includes updates based on industry changes and participant feedback.
  - Manage continuing education unit (CEU) eligibility for NXT Level 1 and 2. Currently, NXT Level 1 and 2 have each qualified for 8 electrical CEUs in Idaho, Montana and Washington<sup>7</sup>.
- Training Promotion & Demand Generation:
  - Drive participation in NXT Level. Tactics have included:
    - Promotion via NXT Level website, quarterly newsletter, email blasts and invites, media placement, event tabling and cross-promotion
    - NXT Level referral program
  - Drive awareness and demand for NXT Level designees. Current assets include:
    - Case studies on participants, informational articles, infographics, PDF flyers and other media which direct building managers, owners and facility managers to NXT Level designated contractors
  - Utility marketing toolkit includes: logos, flyers for trade allies and customers, and messaging.
  - Designee marketing toolkits for NXT Level 1 and 2. Each includes: a designation logo, print/digital banners, designation cards, messaging, and flyers.

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<sup>7</sup> Applications to recognize NXT Level for CEUs in Oregon were denied by the State electrical board due to the State's focus on electrical training. This does not exclude NXT Level from receiving CEUs from Oregon in the future.

## 5 Definitions and Applicable Documents

Learning Management System (LMS): An online platform to deliver training, manage user enrollment and access to curriculum, and track user progress. NXT Level 1 and 2 curriculums are currently delivered via Docebo, an LMS used for several programs at NEEA. NEEA can provide complimentary access to the NXT Level LMS to interested parties. Access will expire at the close of this RFP process.

NXT Level: The market-facing training and designation program developed by NEEA to train and differentiate lighting professionals on advanced lighting retrofit techniques and technologies. Most information can be found at <https://nxtleveltraining.com>. All NXT Level assets are listed in Appendix C.

NXT Level 1: The first tier of training offered by NXT Level. Participants who complete the training earn NXT Level 1 designation. Description available at: <https://nxtleveltraining.com/training/level-1-training>.

NXT Level 2: The second (and currently highest) tier of training offered by NXT Level; only available to NXT Level 1 designees. Participants who complete the training earn NXT Level 2 designation. General description available at: <https://nxtleveltraining.com/training/level-2-training>. Description of Level 2 curriculum is available at: [https://nxtleveltraining.com/wp-content/uploads/2019/04/NXT\\_level\\_2\\_Course\\_flyer-1.pdf](https://nxtleveltraining.com/wp-content/uploads/2019/04/NXT_level_2_Course_flyer-1.pdf).

NXT Level Designee: A trade ally who has enrolled in NXT Level and met requirements of a designation (whether Level 1 or Level 2). Description available at: <https://nxtleveltraining.com/about-nxt-level/individual-designation>

NXT Level Enrollee: A trade ally who has enrolled in NXT Level training but has not necessarily completed the training and other requirements needed to earn a designation.

NXT Level Participant: A NXT Level Designee or Enrollee.

NXT Level Designation List: The official, online listing of all NXT Level designated companies and their designated employees, as well as designated individuals, who offer commercial lighting services for consumers. The list is designed to serve as a resource for consumers and energy efficiency program administrators interested in locating lighting professionals with advanced expertise. Note that some utility and program administration staff throughout the Northwest region have also taken advantage of the training and earned designation. However, they are not eligible (nor is it their intent) to be listed on this Designation List. Available online at: <https://nxtleveltraining.com/nxt-level-designated-companies>

Trade Ally: Trade allies refers to contractors, installers, distributors, and designers working on lighting projects, both in collaboration with utility programs and independently.

## 6 Proposal Submission

Given the unique nature of this market acquisition opportunity, the RFP schedule below includes several *optional* avenues for organizations to learn more about NXT Level, NEEA's objectives, and the range of possible approaches for a partner to acquire NXT Level – prior to submitting proposals. Organizations may utilize whichever following option(s) are most helpful:

1. Group Informational Webinar: Open to all interested parties. Provides an overview of NXT Level and this RFP. [Click here to register](#)
2. Rolling Q&A: Answers returned privately within 3 business days of submittal
3. Individual Informational Webinars: Scheduled with parties who submit an Interest Form. These one-on-one conversations with NEEA are an opportunity for interested parties to ask exploratory questions specific to their organizations. These informal conversations are informational only and will not factor into the scoring of written proposals.

An “Interest Form” (see Appendix A) is requested for all parties interested in learning more and scheduling an Individual Informational Webinar. Only those parties submitting an Interest Form will be invited to an optional, individual informational webinar.

An “Intent to Respond Form” (see Appendix B) will indicate a party’s intent to submit a proposal in response to this RFP. Only those parties submitting an Intent to Respond Form will have their proposals considered.

Proposals shall be submitted electronically per instructions below.

### 6.1 RFP Schedule

11/30/2020	RFP release date
11/30/2020 - 12/31/2020	Rolling Q&A (Answers to be returned privately within 3 business days of submittal)
12/9/2020	Group Informational Webinar from 10:00-11:00 a.m. PT: <a href="#">Click here to register</a>
12/10/2020	Interest Form due by EOB
12/10/2020 - 1/12/2021	Individual Informational Webinars: Scheduled with parties who submit an Interest Form
1/13/2021	Intent to Respond Form due by EOB
2/2/2021	Proposals due by EOB
2/10/2021	Selection of finalists by EOB
2/22 - 2/26/2021	Finalists’ presentations to be scheduled
3/12/2021	Anticipated award date



## 6.2 RFP Point of Contact

All correspondence, including but not limited to, questions and proposal submissions shall be directed to:

Rachel Zakrasek  
Senior Program Coordinator, Lighting  
E-mail: [rzakrasek@neea.org](mailto:rzakrasek@neea.org)

## 6.3 Proposal Format

Please limit proposals to 5 pages in length (not including appendices).

1. **Executive Summary** – Include the key strategies to integrating NXT Level into your organization or business; your vision for the future of NXT Level; proposed timeline; and the reasons NEEA should select your team.
2. **Organization Summary** – Brief summary of your organization’s core mission and markets served. May include any organization-level activities or context relevant to understand the proposed approach.
3. **Approach** – Discuss the proposed approach to delivering and developing NXT Level long-term.
4. **Timeline** – Include a proposed timeline that demonstrates how NXT Level delivery will transition to your organization over time, including suggested milestones.
5. **Cost Estimate** – Discuss potential costs and/or revenues associated you’re your proposed approach and how such costs may be managed between NEEA and your organization, in correlation with the proposed timeline.
6. **Team** – Discuss your staffing strategy and the proposed team.
7. **Appendix:**
  - a. Example Projects – Provide links to or other work examples that demonstrate your capabilities related to this opportunity.

## 6.4 Scoring

Proposals will be rated among others in terms of the overall responsiveness to the RFP – how well all RFP requests have been addressed including, but not limited to:

1. Responsiveness to the RFP and demonstrated ability to take on long-term delivery and development of NXT Level.
2. The thoughtfulness and appropriateness of the proposed approach.
3. The experience of the organization making the proposal.
4. The capability to deliver the program, including past experience and aptitude for collaboration.

Proposals may be evaluated by the NEEA Project Manager, other NEEA staff, and utility representative(s) that we believe have the perspective needed to make this important decision. NEEA is under no obligation to provide work to any vendors responding to this solicitation, nor is there any obligation or intent implied to reimburse any party for the cost of preparing a proposal in response to this RFP.

## **6.5 Minimum Insurance Requirements**

The selected partner must maintain adequate and reasonable insurance including, but not limited to Commercial General Liability insurance of at least \$1,000,000/occurrence, Automobile Liability insurance, and any workers' compensation and unemployment insurance required by law. Professional Liability and Cyber Liability insurance may also be required. NEEA may request a copy of such insurance policies prior to selecting a partner.

# Appendix A – Interest Form

## RFP #: 51699

RFP Title: Market Acquisition Opportunity: NXT Level Lighting Training  
NEEA Point of Contact: Rachel Zakrasek, Senior Program Coordinator, Lighting  
E-mail: [rzakrasek@neea.org](mailto:rzakrasek@neea.org)

### PLEASE PRINT:

<b>Organization</b>	
<b>Address</b>	
<b>City, State, Zip</b>	
<b>Contact Name</b>	
<b>Contact Title</b>	
<b>Phone #</b>	
<b>E-mail</b>	

The organization named above is interested in learning more about NEEA’s request for proposal listed above. Only those organizations submitting an Interest Form will be invited to a schedule a private informational webinar.

Deadline for submitting the “Interest Form” is end of business day, 12/10/2020.

Signature of authorized representative: \_\_\_\_\_

Print Name \_\_\_\_\_

Title \_\_\_\_\_

Date \_\_\_\_\_

# Appendix B - Intent to Respond Form

## RFP #: 51699

RFP Title: Market Acquisition Opportunity: NXT Level Lighting Training  
NEEA Point of Contact: Rachel Zakrasek, Senior Program Coordinator, Lighting  
E-mail: [rzakrasek@neea.org](mailto:rzakrasek@neea.org)

### PLEASE PRINT:

<b>Company</b>	
<b>Address</b>	
<b>City, State, Zip</b>	
<b>Contact Name</b>	
<b>Contact Title</b>	
<b>Phone #</b>	
<b>E-mail</b>	

The organization named above intends to submit a proposal in response to NEEA's request for proposal listed above. Only those organizations submitting an Intent to Respond Form will have their proposals considered.

Deadline for submitting the "Intent to Respond" form is end of business day, 1/13/2021.

Signature of authorized representative: \_\_\_\_\_

Print Name \_\_\_\_\_

Title \_\_\_\_\_

Date \_\_\_\_\_



**NXT**  
↳ LEVEL ↳

# *NXT Level Training*

This scalable lighting training and designation program helps lighting professionals differentiate themselves in the market by equipping them with the latest advanced lighting techniques and technologies.

Designed for online delivery, including on-demand modules and live webinars, the NXT Level curricula takes a tiered approach of achievable levels to allow for further development as the industry evolves. In addition to empowering lighting professionals with invaluable knowledge and CEUs in Idaho, Montana and Washington, the NXT Level program provides them with a marketing toolkit and a spot on the exclusive NXT Level Designation List to help them derive promotional value from their training achievements.

The NXT Level program reaches prospective participants by promoting the training and nurturing a market presence through a custom website ([nxtleveltraining.com](http://nxtleveltraining.com)), email newsletter, a suite of branded marketing assets, and consistent promotion from Northwest utilities.

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The lighting industry is so complicated and convoluted. And it keeps evolving all the time. It's essential for us to continue our education and earn advanced designations like NXT Level.”

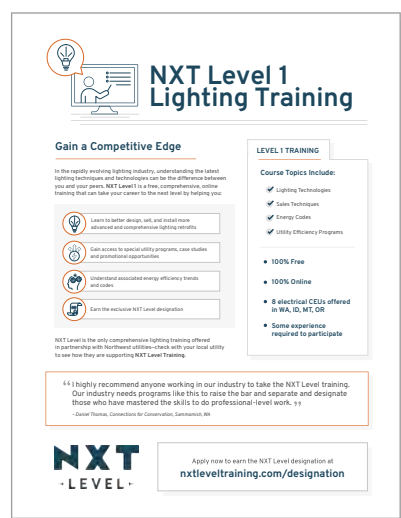
—Alison Miles,  
*Pacific Lamp & Supply Company*

# ▶ **NXT Level Training Curricula and Platform**

NXT Level training is delivered in two tiers: **NXT Level 1** provides lighting professionals with a comprehensive understanding of every aspect of a lighting retrofit, and **NXT Level 2** provides an even more advanced training by diving deeper into the evaluation, design, installation and selling of advanced lighting.

While the curricula for both tiers are designed for online delivery, in-person delivery has also proven successful (when possible).

## **NXT Level 1**



**NXT Level 1 Lighting Training**

**Gain a Competitive Edge**

In the rapidly evolving lighting industry, understanding the latest lighting technologies and techniques can be the difference between you and your peers. NXT Level 1 is a free, comprehensive, online training that can take your career to the next level by helping you:

- Learn to better design, sell, and install more advanced and comprehensive lighting solutions.
- Gain access to special utility programs, case studies and promotional opportunities.
- Understand associated energy efficiency trends and codes.
- Earn the exclusive NXT Level designation.

**LEVEL 1 TRAINING**

**Course Topics Include:**

- ✓ Lighting Technologies
- ✓ Sales Techniques
- ✓ Energy Codes
- ✓ Utility Efficiency Programs

- 100% Free
- 100% Online
- 8 electrical CEUs offered in WA, ID, MT, OR
- Some experience required to participate

NXT Level 1 is the only comprehensive lighting training offered in partnership with National Utility Check with your local utility to see how they are supporting NXT Level Training.

44 highly recommend anyone working in our industry to take the NXT Level training. Our industry needs programs like this to raise the bar and separate and designate those who have mastered the skills to do professional-level work. >>

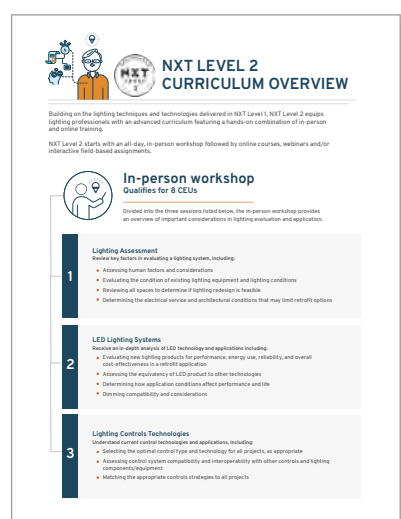
Close Track, courtesy of GreenSource, Inc. & A&P

**NXT LEVEL**

Apply now to earn the NXT Level designation at [nxtleveltraining.com/designation](http://nxtleveltraining.com/designation)

- Curriculum launched in 2016 and last updated in Q2 2020.
- Delivered in seven modules, each focusing on a different aspect of a project. Modules include lighting technologies, sales techniques, navigating energy codes, and understanding utility efficiency programs.
- Modules are available on-demand, but can also be delivered as live webinars.
- With each module requiring about an hour to complete, the full curriculum takes about 8 hours to complete and is equivalent to 8 CEUs.
- To earn NXT Level 1 designation, participants must pass brief course exams to confirm their understanding of the material.
- Visit [the website](#) for a course overview.

## **NXT Level 2**



**NXT LEVEL 2 CURRICULUM OVERVIEW**

Building on the lighting techniques and technologies delivered in NXT Level 1, NXT Level 2 helps lighting professionals with an advanced curriculum featuring a hands-on combination of in-person and online learning.

NXT Level 2 starts with an all-day, in-person workshop followed by online courses, webinars and/or interactive Field based assignments.

**In-person workshop**  
Qualifies for 8 CEUs

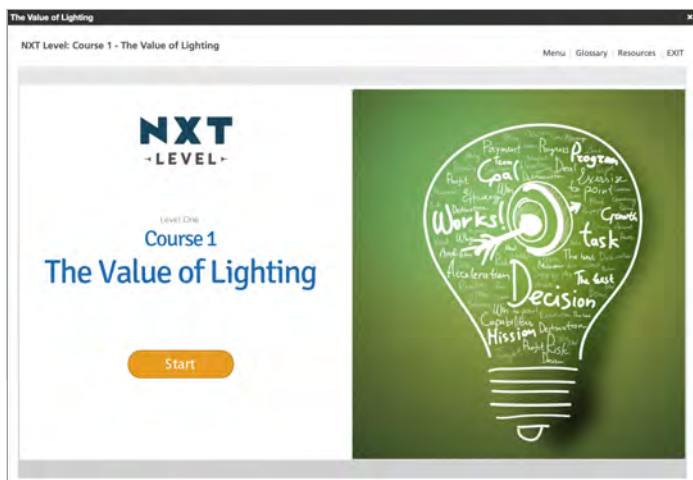
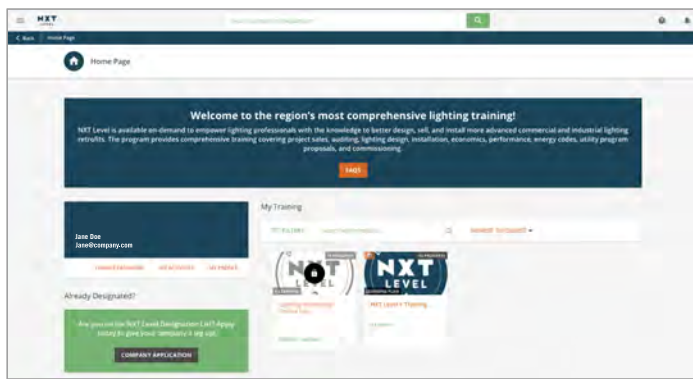
Divided into the three sessions listed below, the in-person workshop provides an overview of important considerations in lighting production and application.

- 1 Lighting Assessment**  
Review key factors in evaluating a lighting system, including:
  - Assessing market factors and considerations
  - Evaluating the condition of existing lighting equipment and lighting conditions
  - Reviewing all spaces to determine if lighting retrofits is feasible
  - Determining the electrical service and architectural conditions that may limit retrofit options
- 2 LED Lighting Systems**  
Review key design aspects of LED technology and applications including:
  - Evaluating new lighting products for performance, energy use, reliability, and overall cost effectiveness in specific applications
  - Assessing the equivalency of LED product to other technologies
  - Determining how application conditions affect performance and life
  - Determining compatibility and considerations
- 3 Lighting Controls Technologies**  
Understand current control technologies and applications, including:
  - Selecting the optimal control type and technology for all projects, as appropriate
  - Assessing control system compatibility and interoperability with other controls and lighting components/equipment
  - Matching the appropriate controls strategies to all projects

- Curriculum launched in 2018 and last updated in Q1 2020.
- Begins with an intensive workshop that reviews key factors in evaluating a lighting system and provides in-depth analysis of current LED and controls technologies and applications. The workshop can be delivered in-person as an all-day training event, or delivered online as a three-part webinar series. Both versions are equivalent to 8 CEUs.
- Upon completing the workshop, participants select one area of specialization and complete the associated on-demand courses, live webinars and/or field assignments. The areas of specialization are: 1) Project Development (focusing on selling advanced lighting solutions), 2) Design & Specification, and 3) Installation & Setup. For a single area of specialization, courses take approximately 6 hours to complete.
- Visit [the website](#) for a course overview.

## Docebo platform

- NXT Level 1 and 2 curricula are currently delivered via Docebo, a cloud-based learning management system (LMS). Several NEEA programs share a single Docebo license.
- Docebo capabilities include:
  - Secure user account management
  - Homepage customization
  - On-demand curriculum delivery
  - Participation tracking in training events (e.g., live webinars or offline assignments)
  - Interactive elements such as in-training Q&A with lighting experts
  - Training enrollment management at individual or cohort level
  - Usage reports including completion rates, exam performance rates, average time to complete training, and frequency of user access



“ I highly recommend anyone working in our industry to take the NXT Level training. Our industry needs programs like this to raise the bar and separate and designate those who have mastered the skills to do professional-level work.”  
—Daniel Thomas,  
Connections for Conservation

## ▶ *Northwest utility participation*

Northwest utilities utilize NXT Level as a lighting training resource and as a tool to differentiate trained lighting contractors in their regional markets. Utilities have incorporated NXT Level into their programs in a variety of ways, including by:

- Referring customers to the NXT Level Designation List in lieu of maintaining their own vetted list of contractors.
- Differentiating NXT Level designees on their own vetted list of contractors through preferential ranking.
  - For example, **Idaho Power** highlights their regional NXT Level designees by listing them first, in bold with an asterisk, on their vof preferred lighting contractors.
- Including NXT Level designation as an eligibility requirement for certain program opportunities. For example:
  - **Pacific Power** uses NXT Level designation as a path to achieve their Premium Vendor status. Premium Vendors appear first on their list of contractors, with a special title and logo.
  - **Energy Trust of Oregon** requires at least one employee to be a NXT Level designee for a company to be eligible to win a Trade Ally Award.
- Promoting NXT Level by:
  - Hosting NXT Level live webinars for their own contractors.
  - Posting promotional materials and events on their websites and in contractor newsletters.

“

We look to keep apprised of new products and industry changes by engaging with manufacturers and reps and by putting a high value on in-person workshops and trainings offered by utilities. This exposes us to more ideas and opportunities, which has led to more jobs being secured by our company.”

—Ross Pearson,  
Northwest Edison



## ▶ ***NXT Level Implementation Assets***

In the creation and administration of NXT Level training, the program has created and developed a suite of guides, data and reports that are key to efficient and effective training implementation. These materials include:

### ***Implementation guide***

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A comprehensive guide containing key information needed to implement NXT Level training and designation, including:

- Systems overview
- Training eligibility and designation requirements for individuals and companies
- Process documentation for processing applications, creating accounts, assigning curriculum and maintaining the Designation List
- Key communications to users via email or through the LMS

### ***Participant data***

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- Full contact information and eligibility requirements collected from application forms
- Full enrollment and designation data
- Real-time training progress and usage data tracked directly in the LMS

### ***Survey data***

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- **NXT Level 1 Pre-Training Survey**
  - Participants are required to complete before accessing NXT Level training content.
  - Survey gathers information on how the participant currently uses various lighting best practices in their work, in addition to collecting profile details such as role and location.
- **NXT Level 1 and 2 Post-Training Surveys**
  - Participants are required to complete before earning NXT Level 1 or 2 designation.
  - Includes questions about the participant's experience with NXT Level 1 or NXT Level 2 training and how they anticipate they will apply their training in the market.

### ***Program assessment report***

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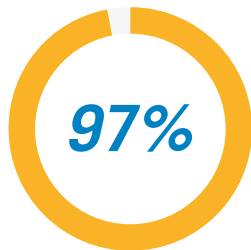
Completed by BrightLine Group in January 2020, this third-party report assesses the impact of NXT Level training through participant surveys and interviews.

## Survey results snapshot

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*of respondents say they incorporate skills learned through NXT Level training into their work*



*of respondents would recommend NXT Level training*

### Survey and interview quotations:

- “ It’s not easy, but that’s good. It’s a great program. I would tell everyone to do the training. It builds confidence when talking to a customer and explaining the financial and energy-saving benefits of changing their lighting. I am a huge advocate for this program. Because of this program, I’ve hit top sales in my group at my company.”
- “ I tell people it’s a training that goes more in-depth into lighting and helps people understand the lighting design and process. I tell them it’s helped me gain the knowledge to help educate others what is the best for them. I think we should market it more.”
- “ I think NXT Level is top-notch because it is all about business.”
- “ I think I’ve retained the content very well. I like the multiple facets that are used to engage in each component.”

### ▶ NXT Level participation through October 2020

**707** individual participants

**332** NXT Level 1 designees

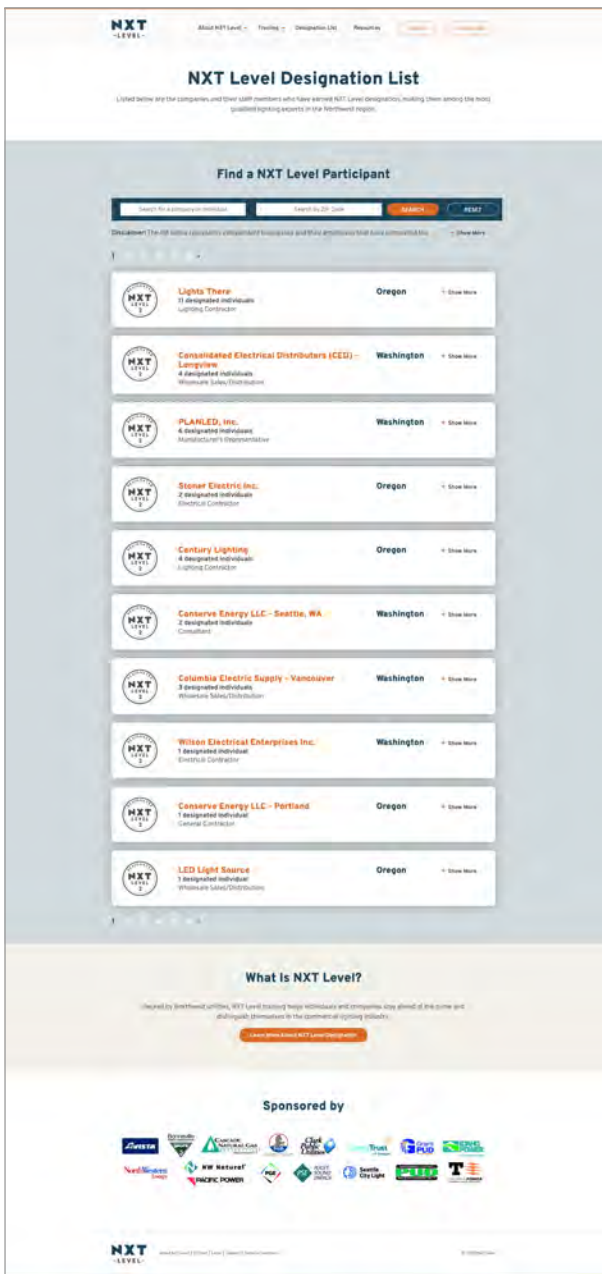
**78** NXT Level 2 designees

# ▶ Marketing and Communications Assets

The NXT Level team has developed a variety of marketing and communications assets to promote the training to prospective participants, and to add value for designees by equipping them with marketing tools to help them promote their exclusive designation. These assets include:

## Website

Featuring a custom domain ([nxtleveltraining.com](http://nxtleveltraining.com)), the NXT Level website offers information about the training and designation, including the application form, the public NXT Level Designation List, and public resources including case studies, infographics, newsletter articles and flyers. The website also includes non-searchable URLs for additional designee- and utility-only resources such as the utility marketing toolkit.

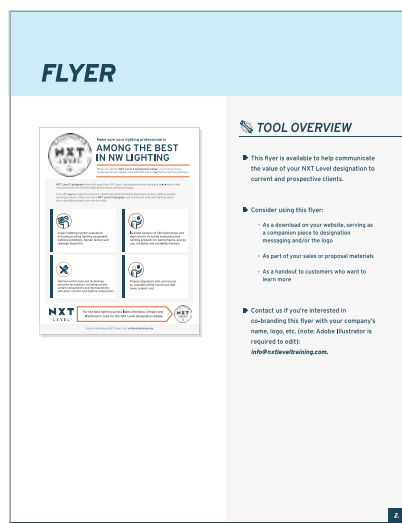
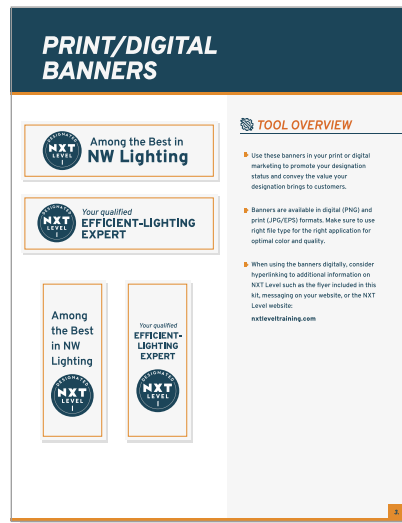


# Marketing toolkits

**Designee marketing toolkits** are provided directly to designees once they achieve NXT Level 1 and 2. Designed to help designees promote their high level of training, the toolkits include print and digital versions of the NXT Level designation logo, print and digital banners, designation cards, messaging, and flyers.

The **utility marketing toolkit** is provided to all NEEA-funding utilities to make it easy to promote the training to professionals in their region. Available via a non-searchable URL on the NXT Level website, the utility marketing toolkit includes logos, flyers, and participant- and customer-facing messaging for NXT Level 1 and 2.

The **ambassador marketing toolkit** helps NXT-Level-designated utility program or implementation staff promote the value of NXT Level training to prospective participants in their network. Available via a non-searchable URL on the NXT Level website, the ambassador toolkit includes NXT Level 1 and 2 ambassador logos, flyers and messaging.



# Case studies

The NXT Level team has created several case studies showcasing NXT Level designees. These case studies spotlight their advanced skillset, promote the company they work for, and demonstrate how NXT Level has helped their lighting career. Built from in-depth interviews with individual designees, the case studies highlight their experience with NXT Level and how it helps them provide advanced lighting solutions to their customers. The case studies are ideal for both participant- and customer-facing marketing. They are featured by the NXT Level program in newsletters and **on the NXT Level website**, and available for PDF download.

# E-newsletter template and content

Delivered quarterly since launch (and **available on the program website**), NXT Level e-newsletters feature technical articles, case studies, invitations to upcoming training events, relevant utility program updates, and a “Controls Corner” with cutting-edge information specific to advanced controls. The e-newsletters are delivered using the Emma email marketing program.

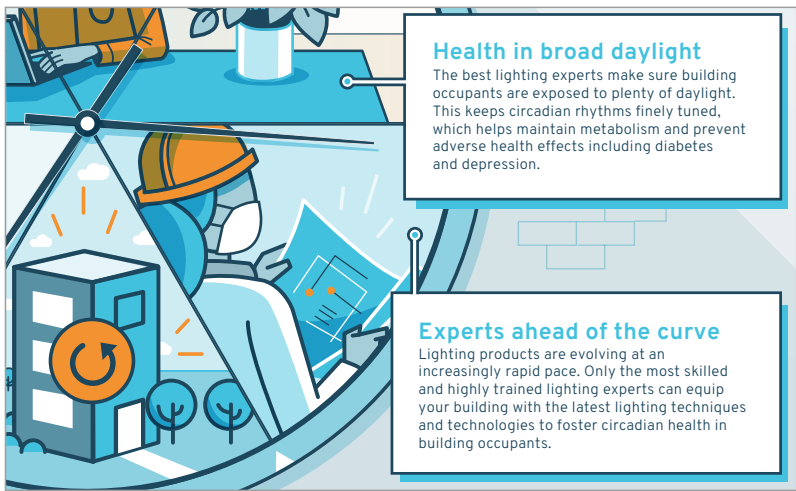
# Referral program

The NXT Level referral program motivates designees to refer friends and colleagues to enroll in NXT Level training. The designee hands out a branded referral card and receives a prize when the referred party goes on to earn their designation. The referral program includes messaging and branded materials that promote the referral campaign to designees.

## Customer demand generation campaign

The NXT Level team has developed a series of educational articles and infographics to educate building owners, managers and facility managers on the benefits of advanced lighting. These materials additionally direct the audience to find lighting professionals with NXT Level designation. Ideal for posting in newsletters, on websites and social media, and in trade publications, these materials are also hosted on the NXT Level website:

- **Commercial lighting is far more complex these days—and much more beneficial**
- **The physiological and psychological benefits of advanced lighting design**



“

Changes in lighting technology are so fast-paced that it is hard for contractors to stay up to date on all the products. If I keep myself educated, then I'm a better resource and can help them deliver a stronger recommendation to their customers.”

—Sam Fisher,  
Electric Wholesale Supply

# THE MULTILEVELED BENEFITS OF ADVANCED LIGHTING



The latest advanced lighting techniques and technologies deliver energy savings, comfort and control like never before.

## Advanced lighting is healthy lighting

Buildings with optimized lighting help occupants and operators adapt to changing circumstances through features like touchless controls, space adaptability and occupant-and-asset monitoring capabilities.

## Let some daylight into your design

When lighting design leverages daylight to illuminate workspaces, energy bills are reduced and employee productivity can improve by as much as 18%.<sup>1</sup>

## Advanced controls offer more flexibility...

Advanced controls like Luminaire Level Lighting Controls (LLCs) combine controls and sensors to provide personalized lighting that improves comfort and supports specific tasks.

## ...and significant energy savings

LLCs use 25 to 75 percent less energy than non-controlled fixtures while providing value beyond energy savings. Features include pre-programming, asset tracking, space utilization, enhanced security and more.

## You only have one chance at a first impression

Only specially trained lighting experts can help businesses cultivate the intended visitor experience through customized lighting design.

## Display your products in the best possible light

Optimized lighting is critical to showcase your products and offer a compelling retail experience.

## Offer peace of mind, inside and out

Both indoors and outdoors, quality lighting promotes safety and peace of mind for visitors.

## Put your sustainability and occupant-health goals into action

Efficient lighting systems can be an excellent way for a company to demonstrate commitment to the environment, occupant well-being, and reduced operational costs.

<sup>1</sup>World Green Building Council, Business Case for Green Building, April, 11, 2013.

NXT Level professionals are among the best lighting experts in the Northwest. They'll work with you to find the right solution based on your specific building, occupant needs, and owner goals. Visit the NXT Level Designation List to find the best lighting experts in your area:

► [nxtleveltraining.com/experts](http://nxtleveltraining.com/experts)



NXT Level training is a nonprofit-backed training curriculum supported by Northwest utilities. This specialized coursework equips lighting professionals with the latest advanced techniques and technologies to provide energy savings and advanced lighting solutions for Northwest commercial buildings.

# ADVANCED LIGHTING FOR HEALTHY BUILDINGS

The latest lighting techniques and technologies can be utilized to support the physiological and psychological health of building occupants.

## Our critical internal clocks

The circadian rhythm is the internal clock that guides humans and animals across a 24-hour cycle. Our circadian rhythms maintain our health by responding to external signals, the most important of which is lighting.

## Lighting the way to good health

Advanced lighting experts can design indoor lighting environments that support the circadian rhythms of building occupants. Circadian health is crucial to a variety of health functions including immune systems, blood pressure and sleeping patterns.

## Occupant control, occupant health

Many advanced lighting technologies such as Luminaire Level Lighting Controls (LLLCs) enhance occupants' circadian health and comfort. These technologies allow adjustments or programming so that light levels respond to time of day and/or the task at hand.

## Health in broad daylight

The best lighting experts make sure building occupants are exposed to plenty of daylight. This keeps circadian rhythms finely tuned, which helps maintain metabolism and prevent adverse health effects including diabetes and depression.

## Whole-building health

The most beneficial lighting design integrates advanced lighting technologies (e.g., LLLCs, wireless controls, task tuning, tunable LEDs and acoustical sensors) with other areas of building design (e.g., windows and HVAC) to create even healthier indoor environments.

## Experts ahead of the curve

Lighting products are evolving at an increasingly rapid pace. Only the most skilled and highly trained lighting experts can equip your building with the latest lighting techniques and technologies to foster circadian health in building occupants.

NXT Level professionals are among the best lighting experts in the Northwest. They'll work with you to find the right solution based on your specific building, occupant needs, and owner goals. Visit the NXT Level Designation List to find the best lighting experts in your area:

► [nxtleveltraining.com/experts](https://nxtleveltraining.com/experts)

**NXT**  
- LEVEL -

contractor / utility  
logo FPO

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