

Market Progress Evaluation Report **Executive Summary**
**Northwest Energy Education
Institute, No. 1**

prepared by

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report #E99-030

June 1999



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**MARKET PROGRESS EVALUATION REPORT
NORTHWEST ENERGY EDUCATION INSTITUTE**

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EXECUTIVE SUMMARY

An energy efficient economy requires the presence of well-trained energy managers and service professionals. In turn, energy professionals require access to affordable, convenient, well-regarded training programs. However, in the Northwest, as in most other parts of the country, there has been a lack of such programs. The Northwest Energy Education Institute, with seed money from the Northwest Energy Efficiency Alliance, proposes to close this gap, not only for the period of Alliance support, but on a self-sustaining basis. This report describes the early development and accomplishments of the Institute, highlights important strengths and weaknesses, and offers recommendations for enhancing effectiveness to be considered by the Institute.

The Institute, based at Lane Community College in Eugene (OR), is designed to take advantage of the market opportunities resulting from the lack of readily accessible, affordable training programs for energy managers and related professionals. It is developing relevant workshops and a certification program designed to meet training needs. It will also provide training support to other Alliance ventures that involve training in energy efficiency. In addition, the Institute is pursuing mechanisms to disseminate these programs throughout the Alliance's region; for example, via other community colleges and distance learning programs.

The Institute is intended to carry out these activities on a long-term, sustainable basis. Thus, it is critical that efforts are made to establish an effective infrastructure at the same time that it develops a credible substantive program. This report offers a first look at the accomplishments of the Institute in these various areas of endeavor.

The Alliance contract supporting the Institute has been in effect for approximately nine months—through the current academic year. During this period, the Institute has experienced start-up problems in negotiating the institutional bureaucracy and in developing staff and consulting support. Nonetheless, the Institute has already successfully initiated progress toward meeting its near-term objectives and the development of a sustainable organization. The accomplishments of the Institute and its Director include the following in each of the key areas of interest:

- To meet market needs; capitalize on opportunities; provide training support—
 - Mounted workshops in support of Alliance ventures and other sponsors
 - Identified and contracted with the developer of a model curriculum to assist in preparing the certification program
 - Developed an initial set of marketing materials
 - Established a website
 - Initiated a database of clients and potential clients

- To disseminate programs throughout the Alliance's region—
 - Helped proselytize—through teaching and demonstration—for the inclusion of energy management curricula at other community colleges
 - Conducted a preliminary study of requirements for distance learning

- To develop an infrastructure and move toward sustainability—
 - Developed an initial budget and installed management software
 - Engaged the participation of a representative set of experts as an Advisory Board
 - Contracted for development of a business plan and a marketing plan
 - Developed a two-year contract to provide training for customers and employees of a major HVAC controls manufacturer
 - Initiated efforts to secure grant funds outside the Alliance
 - Determined that its relationship with the College provides strong liability protection for the proposed certification program
 - Gained the endorsement of the American Institute of Architects and is exploring the possibility of endorsements from other national organizations

Among the strengths displayed by the Institute during this period are the development of its vision for a self-sustaining program, responsiveness to market needs and opportunities, the ability to develop partnerships and network with other experts. In addition, the Institute has the opportunity to benefit from the knowledge of a talented Advisory Board and the institutional support of a strong community college.

Most of the weaknesses observable to date appear to reflect the difficulties attendant on the start-up of any significant project, especially when much of the impetus is from one committed individual. In particular, the Institute's success to date appears to derive largely from the singular efforts of the Director, rather than a broader organizational structure or process. Similarly, some strengths of the Advisory Board have been engaged, but the process of involving and utilizing the enthusiasm of the members has only begun. Finally, for all the value the College provides, it remains an institution that is not entrepreneurial at heart and it is necessary to recognize and deal with the bureaucratic issues that the relationship poses.

Many of the difficulties that have limited the development of the Institute to this point are likely to be fully overcome in the near future. Hiring of a full-time assistant to the Director appears to be imminent, business planning and curriculum planning are in progress, and additional funding support seems likely to be forthcoming. In the interim, two major suggestions arise from this evaluation. These are the following: The Institute should carry out an assessment of the regional market for energy education and training and it should develop systematic processes for planning, promoting, and evaluating its workshop offerings.