

Inclusive Contractor Playbook

Contractor Support Metrics Template

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This metrics tool template is designed to offer a practical framework that helps organizations assess capacity-building efforts, identify areas where targeted support may be needed, and understand the strength of their partnerships. The metrics included are suggestions intended to guide your thinking. Each business should determine which measures are most relevant and also consider the tools and processes needed to collect data consistently over time. You do not need to adopt every metric for this resource to be useful. Selecting the pieces that best fit your operations can still lead to meaningful insights.

Capacity Building Metrics

Goal: Ensure contractors develop the technical, operational, and business capabilities required to deliver high-quality work and support long-term program success.

Purpose: These metrics help the business understand the current strength of the contractor network, identify capability gaps, and prioritize improvements in training, operational consistency, and geographic coverage.

- Percentage of contractors completing required technical training
- Workforce training and certifications completed
- Percentage of contractors with formalized operational processes such as SOPs, safety plans, and QA processes
- Number of qualified contractors in network by geography and specialization
- Geographic coverage, reflecting the regions or markets where qualified contractors are available

Responsive Support Metrics

Goal: Provide contractors with support, training, and resources that are tailored to their needs and aligned with their growth stage, ensuring they can progress effectively and confidently.

Purpose: These metrics help the business understand how well contractor needs are being identified and addressed, whether support is aligned with their development stage, and where improvements are needed to deliver more relevant, impactful resources and training.

- Completion rate of annual contractor satisfaction surveys
- Contractor satisfaction scores across key support areas
- Percentage of support processes updated based on contractor feedback
- Frequency of internal and external recognition of contractor achievements
- Number of lessons learned and best practices documented and implemented

Procurement and Partnership Metrics

Goal: Strengthen long-term, mutually beneficial partnerships by ensuring procurement practices support high-quality project delivery, contractor sustainability, and equitable participation across the network.

Purpose: These metrics help the business understand the health and stability of contractor partnerships, measure equitable distribution of contract opportunities, and assess how procurement decisions contribute to economic growth, community impact, and clean energy deployment.

- Contractor retention rate
- Percentage of contracts and contract dollars awarded to MWBEs
- Percentage of contracts and contract dollars awarded to small businesses (threshold TBD)
- Jobs created in target communities, including installation roles and apprenticeships
- Contractor business growth, including revenue increases and employee growth
- Increase in annual revenue of participating contractors
- Clean energy capacity installed, measured in kW or households served

Template

The template below provides a structured way for businesses to monitor progress across key areas of contractor development, partnership health, and operational performance. Each category includes specific metrics that organizations can baseline, set targets for, and track over time. By consistently updating this table, businesses can measure the effectiveness of their initiatives, identify gaps, and make data-driven decisions that support contractor growth and stronger program outcomes.

Category	Metric	Baseline	Target	Timeline
Capacity and Skill Building	Percentage of active contractors who complete all required technical training modules within a defined period.	40%	75%	Year 2
Capacity and Skill Building	Total number of training sessions, courses, or certifications completed by contractor employees.			
Capacity and Skill Building	Percentage of contractors who implement and maintain documented operational processes aligned with your standards.			
Capacity and Skill Building	Total count of contractors who meet your qualification criteria, broken down by market and specialty.			

Capacity and Skill Building	Percentage of priority geographies that have sufficient contractor coverage.			
Targeted and Responsive Support	Survey participation rate (% of contractors who respond)			
Targeted and Responsive Support	% of participants who report the training was "highly useful"			
Targeted and Responsive Support	Number of process improvements completed per year			
Targeted and Responsive Support	Number of success stories published per quarter			
Targeted and Responsive Support	Number of best practice guides created annually			
Targeted and Responsive Support	Number of contractors recognized annually			
Performance and Partnership	% of contractors retained annually			
Performance and Partnership	% of total contracts/contract dollars awarded to MWBEs			
Performance and Partnership	% of contracts/contract dollars awarded to small businesses			
Performance and Partnership	Total number of jobs, apprenticeships, or workforce opportunities generated through contractor activity.			
Performance and Partnership	Average annual revenue growth of participating contractors			
Performance and Partnership	Total kW installed			