Supplier Vetting Toolkit for Community Energy Upgrade Programs

Developed by the Energy Upgrades for Australian Homes (EUAH) program

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Table of contents

Introduction **2**

Supplier Vetting Process **2**

Evaluation Criteria **4**

Expression of Interest (EOI) Template **6**

Interview Questions **8**

Introduction

This toolkit is designed to support local councils, community groups, and upgrade programs in vetting suppliers for household energy upgrades. It provides a structured and practical process for ensuring high-quality, reliable, and community-aligned suppliers are selected.

This pack is designed to be flexible. You can adapt the questions, scoring, and process steps to your local context and product mix (solar, batteries, heating/cooling, hot water, induction, insulation, etc.).

Supplier Vetting Process

Step 1 – Create an Expression of Interest (EOI)

- Once you've decided what your program looks like and which products you'd like to offer, you can start preparing your Expression of Interest.
- This is a short online form covering business details, licensing, insurances, values, product/service range, and motivation.
- You can find draft questions for this in the "Expression of Interest" section below.

Step 2 – Outreach & Invitation

- Share the EOI publicly through your communication networks.
- Supplement responses by actively identify local suppliers through Google searches and recommendations and inviting them to submit an Expression of Interest (EOI).

Step 3 – Application Review & Verification

- Check the minimum requirements: licences, insurances, relevant certifications, warranties, and experience.
- Review public reviews/ratings
    - *Optional: Do a light "mystery shop" call to test customer service.*

Step 4 – Shortlisting

- Convene a panel (staff + independent assessor/partner) to shortlist based on agreed evaluation criteria.
- You can use the "Evaluation Criteria" and matrix below to guide this, adjusted for what's most important for your program.

Step 5 – Interviews

- Invite shortlisted suppliers to 1–2 structured interviews (in-person or online)

- Cover business capacity, customer service, product range, program fit, and willingness to collaborate.
- You can find draft questions for this in the “Supplier Interview” section below.

Step 6 – Preferred Supplier Selection & Agreement

- Select suppliers who best meet criteria.
- Sign an agreement covering responsibilities, data sharing, compliance, and expectations (e.g. timely follow-up, participation in events, quality assurance).

Step 7 – Ongoing Monitoring

- Request feedback from households after installations.
- Monitor complaints, customer journey, and quotes.
- Allow suppliers to improve but remove repeat poor performers.

Key tips

- Verify licences and insurances before progressing suppliers.
- Use at least two assessors for shortlisting and interviews to ensure fairness.
- Keep records of scoring sheets for transparency.
- Collect feedback from households after each installation.
- Review supplier performance annually and refresh agreements as needed.

Evaluation Criteria

These criteria have been developed based on those suggested by experienced upgrade programs:

- **Capability & Capacity** – team size, ability to manage leads, geographic coverage.
- **Experience & Track Record** – years in business, installs completed, references.
- **Product & Service Offering** – range of upgrades, product quality, warranties.
- **Customer Service** – responsiveness, communication, complaint handling.
- **Values Alignment** – commitment to local jobs, ethical supply chains, environmental responsibility.
- **Local Benefit** – use of local subcontractors, economic contribution.
- **Price & Value** – transparent, fair, negotiated prices, affordable and premium options.
- **Added Value** – education, event support, innovative offerings.

Example scoresheet

Criteria	Score (1 low –5 high)	Comments
Capability & Capacity Team size, ability to manage leads, geographic coverage		
Experience & Track Record Years in business, installs completed, references		
Product & Service Offering Range of upgrades, product quality, warranties		
Customer Service & Quality Assurance Responsiveness, communication, complaint handling process		
Values Alignment Commitment to local jobs, ethical supply chains, environmental responsibility		
Local Benefit Use of local subcontractors, economic contribution.		
Price & Value Transparent, fair, negotiated prices, affordable and premium options.		
Added Value Education, event support, innovative offerings.		
Overall Assessment (Total Score out of 40)		**Recommendation:** ☐ Yes ☐ No ☐ Maybe
Final Notes		

Expression of Interest (EOI) Template

This is best delivered as an online form:

Introduction
Thank you for your interest in partnering with our program. This survey collects information about your business, services, and capacity. Your responses will be used to assess suitability as a preferred supplier. Please answer all questions as fully as possible.

Company Basics

1. What is your business name? (Short answer)
2. What is your Australian Business Number (ABN)? (Short answer)
3. Where is your business located? (Short answer – suburb and state)
4. Who is the main contact person for this application? (Fields for name, role, phone number, and email address)
5. How many years has your business been in operation? (Number)
6. How many staff do you currently employ? (Number)
7. Please upload copies of your current licences, insurances, and certifications. (File upload)

Products & Services

1. Which upgrade products do you offer? (Checkboxes – select all that apply)
    - Solar PV
    - Batteries
    - Hot water heat pumps
    - Heating and cooling (reverse cycle)
    - Induction cooktops
    - Draught-proofing
    - Insulation
    - EV chargers
    - Other (please specify)
2. Do you provide both affordable and premium options? (Paragraph text)
3. What warranties do you offer? (Paragraph text – include both products and workmanship)

Experience & Capacity

1. Please describe your experience in delivering upgrades. (Paragraph text)
2. How many installations have you completed in the past 12 months (product and number)? (Short answer)
3. How many installations do you typically undertake per week (product and number)? (Short answer)

Motivation & Alignment

1. Why do you want to partner in this program? (Paragraph text)
2. What outcomes do you see for the community and your business? (Paragraph text)

Customer Service & Quality Assurance

1. How do you reach out to customers about your program? (Paragraph text)
2. How do you handle complaints and after-sales support? (Paragraph text)
3. Please share links to online customer reviews/testimonials. (Short answer / URLs)

Community & Environment

1. Do you employ local trades or subcontractors? (Yes/No + optional paragraph for details)
2. What steps do you take to reduce environmental impact (e.g. recycling, sustainable practices)? (Paragraph text)

Pricing

1. Please provide indicative pricing for your key products/services. (File upload or table field)
2. Are you willing to offer a program discount? (Multiple choice)
    - Yes
    - No
    - Maybe / to be discussed

References

1. Please provide details of 2–3 referees (customers or partners). (Paragraph text — include name, contact details, and relationship)

Interview Questions

"Thanks for taking the time to meet with us today. This interview is part of our supplier vetting process. We'd like to get a good understanding of your business, how you work with customers, and how you see yourself fitting into this program. Let's get started with some questions about your business."

1. About Your Business

- "Can you remind us why you expressed interest in being a delivery partner for this project? What motivates you to be involved?"
- "Tell us a bit more about your business structure and capacity. Why do you have confidence in your team's ability to deliver?"
- "What product offerings and pricing structures are you suggesting, and why do you think they will work in this program?"

2. Customer Journey & Service

- "Please walk us through the customer journey - from first enquiry through to installation and after-sales service."
- "If you are not providing all upgrade offerings, how would you work with other providers to ensure a smooth customer journey?"
- "How do you manage complaints, follow-up, and ongoing customer support?"
- "Can you tell us more about how you will promote the program and run information sessions?

3. Capacity & Operations

- "Some programs generate more than 900 enquiries over a couple of months. How would your business handle a large volume of leads, for example 100 in a week?"
- "How will you service a large geographic area, including more remote households?"
- "What approaches do you use to ensure quality and safety on-site (e.g. supervision, use of subcontractors, safety practices)?"

4. Values & Alignment

- "What do you think will be the easiest part of this project for your business, and what do you think will be the hardest?"
- "How is your business supporting local trades and contributing to the community?"
- "Are you open to offering discounts or added value for households in this program?"

5. Collaboration & Fit

- "Where do you see the role of our organisation beginning and ending in this process? How do you see us working together?"

- "Would you be open to exploring issues like recycling, end-of-life management, or supporting future readiness (e.g. EV charging capacity, expandable systems)?"
- "Do you see opportunities to contribute beyond installations - for example, through community events or education sessions?"

Closing

"Thank you for your time today. Before we finish, is there anything else you'd like to add about your business or how you see this partnership working?"