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**CALIFORNIA
ENERGY COMMISSION**



California Energy Commission

PROGRAM GUIDELINES

Equitable Building Decarbonization Tribal Direct Install Program Guidelines

Gavin Newsom, Governor
January 2026 | CEC-300-2025-001-CMF



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DISCLAIMER

These Final Program Guidelines were prepared by the California Energy Commission (CEC) staff as part of the Equitable Building Decarbonization Program Docket #22-DECARB-03. After considering public comments, these Guidelines were adopted by the CEC at the January 21, 2026, business meeting. These Guidelines were prepared in accordance with the process specified in Public Resources Code Sections 25665.3 and 25665.6, as well as staff analysis and public input. The information contained in these Guidelines is intended to be final; however, subject to the public process for updating the guidelines, the CEC may amend the guidelines with additional public input and staff analysis. The contents of this report are not intended to be construed as legal advice.

ABSTRACT

These guidelines for the Equitable Building Decarbonization Tribal Direct Install Program outline the initial rules and requirements for the program, including funding allocations, household and property eligibility requirements, and eligible measures. Assembly Bill 209 (Committee on Budget, Chapter 251, Statutes of 2022) directed the California Energy Commission to develop the Equitable Building Decarbonization Direct Install Program. A direct install program is a type of program that provides and installs energy-efficient electric appliances, energy efficiency measures, and related upgrades directly to consumers at minimal or no cost.

The Tribal Direct Install Program will serve residential buildings owned or managed by California Native American tribes or California tribal organizations, and residential buildings owned by members of California Native American tribes. The primary goals of the program are to reduce greenhouse gas emissions and advance energy equity. All California Native American tribes will have an opportunity to participate in the program.

Keywords: California Native American tribes, tribal, Equitable Building Decarbonization Program, decarbonization, buildings, equity, direct install, energy efficiency, electrification

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CHAPTER 1:

Program Overview

A. Introduction

The Equitable Building Decarbonization Tribal Direct Install Program (Tribal Direct Install Program) will provide energy-efficient electric appliances, energy efficiency improvements, and related upgrades at no cost. Buildings eligible to receive upgrades include single-family homes, multifamily buildings, and manufactured homes in California that are owned by California Native American tribal members or owned or managed by California Native American tribes or tribal organizations.

Throughout this document, “tribe” will refer to a Native American tribe located in California that is on the contact list maintained by the Native American Heritage Commission for the purposes of Chapter 905 of the Statutes of 2004.¹ “Tribal organization” will refer to a corporation, association, or group controlled, sanctioned, or chartered by a California Native American tribe that is subject to its laws, the laws of the State of California, or the laws of the United States.² “Tribal member” will refer to an individual who is an enrolled member of a California Native American tribe residing in California.

B. Background

The State of California is committed to a just and equitable transition to carbon neutrality by 2045.³ Residential and commercial buildings account for about 25 percent of California’s greenhouse gas emissions,⁴ so the decarbonization of buildings is essential to achieving the state’s carbon neutrality goal. Based on the results of the *California Building Decarbonization Assessment*, the *2021 Integrated Energy Policy Report* recommended the state adopt a goal of 6 million heat pump installations by 2030 and direct funding toward building decarbonization retrofits in low-income and disadvantaged communities.⁵ The goal of 6 million heat pumps by

1 Public Resources Code Sections 25665(a) and 21073.

2 Public Resources Code Section 25665(b).

3 [Executive Order B-55-18 To Achieve Carbon Neutrality](https://archive.gov.ca.gov/archive/gov39/wp-content/uploads/2018/09/9.10.18-Executive-Order.pdf), signed by Governor Edmund G. Brown Jr. on September 10, 2018, <https://archive.gov.ca.gov/archive/gov39/wp-content/uploads/2018/09/9.10.18-Executive-Order.pdf>.

4 Kenney, Michael, Nicholas Janusch, Ingrid Neumann, and Mike Jaske. 2021. [California Building Decarbonization Assessment](https://www.energy.ca.gov/data-reports/reports/building-decarbonization-assessment). California Energy Commission. Publication Number: CEC-400-2021-006-CMF, <https://www.energy.ca.gov/data-reports/reports/building-decarbonization-assessment>.

5 Kenney, Michael, Jacob Wahlgren, Kristina Duloglo, Tiffany Mateo, Danuta Drozdowicz, and Stephanie Bailey. 2022. [Final 2021 Integrated Energy Policy Report, Volume I: Building Decarbonization](https://www.energy.ca.gov/publications/2021/2021-integrated-energy-policy-report). California Energy Commission. Publication Number: CEC-100-2021-001-V1, <https://www.energy.ca.gov/publications/2021/2021-integrated-energy-policy-report>.

2030 was endorsed by Governor Gavin Newsom in July 2022.⁶

Assembly Bill 209 (Committee on Budget, Chapter 251, Statutes of 2022) directed the California Energy Commission (CEC) to develop and implement an Equitable Building Decarbonization (EBD) Program, including a direct install program and a statewide incentive program. The Legislature directed that, within the direct install program, preference be provided for buildings meeting the following criteria:⁷

- The building is located in an under-resourced community.⁸
- The building is owned or managed by a California Native American tribe or a California tribal organization.
- The building is owned by a member of a California Native American tribe.

The EBD Program also advances the purposes of Assembly Bill 32 (Núñez, Chapter 488, Statutes of 2006), Senate Bill 375 (Steinberg, Chapter 728, Statutes of 2008), and Senate Bill 32 (Pavley, Chapter 249, Statutes of 2016) by investing in projects that reduce greenhouse gas emissions.

In October 2023, following an extensive public process, the CEC adopted guidelines for the Statewide Direct Install Program, which serves low-income households in underresourced communities.⁹

During development of the Statewide Direct Install Program Guidelines, the CEC sought input on how to most effectively provide a preference for tribes and tribal members in alignment with the statutory direction. Comments received at a scoping workshop in December 2022 and written comments submitted to the docket indicated that tribal communities in California have unique needs and recommended setting aside a portion of the EBD funds for a program focused specifically on tribes. In alignment with this input, and recognizing the unique needs of tribes and tribal communities, the CEC set aside funds for a separately administered Tribal Direct Install Program, to be developed through consultation and engagement with tribes and a public process.

6 [Letter from Governor Newsom to Chair Liane Randolph](https://www.gov.ca.gov/wp-content/uploads/2022/07/07.22.2022-Governors-Letter-to-CARB.pdf), California Air Resources Board. July 22, 2022, <https://www.gov.ca.gov/wp-content/uploads/2022/07/07.22.2022-Governors-Letter-to-CARB.pdf>.

7 Public Resources Code Section 25665.3(a).

8 Public Resources Code Section 25665(i) states that an underresourced community “has the same meaning as defined in Public Resources Code Section 71130,” which is “a community identified pursuant to Section 39711 of the Health and Safety Code, subdivision (d) of Section 39713 of the Health and Safety Code, or subdivision (g) of Section 75005.”

9 Maneta, Diana. 2023. [Equitable Building Decarbonization Direct Install Program Guidelines](https://www.energy.ca.gov/publications/2023/equitable-building-decarbonization-direct-install-program-guidelines). California Energy Commission. Publication Number: CEC-400-2023-003-CMF, <https://www.energy.ca.gov/publications/2023/equitable-building-decarbonization-direct-install-program-guidelines>.

In addition to the scoping workshop in December 2022, the CEC conducted four tribal roundtables in 2023 and 2024 to solicit input on the design of the Tribal Direct Install Program. CEC staff developed draft guidelines based on input received during public workshops, tribal roundtables, and written comments to the docket, in addition to the program goals and requirements established by AB 209.¹⁰ As a result, the structure of the Tribal Direct Install Program is functionally different from the Statewide Direct Install Program but maintains the same decarbonization goals. Following the release of the draft guidelines in September 2025, the CEC conducted two tribal roundtables and one public workshop to present the draft guidelines and receive feedback. The guidelines were then revised and finalized.

C. Program Goals

The primary goals of the Tribal Direct Install Program are to reduce greenhouse gas emissions from existing buildings, advance energy equity, and fulfill the statutory direction to prioritize buildings owned by a member of a California Native American tribe or owned or managed by a California Native American tribe or tribal organization. The program also encourages resiliency to extreme heat, air quality improvements, energy affordability, grid reliability, and local workforce opportunities. Additionally, this program supports the CEC's commitment as part of the Resolution Committing to Support California Tribal Energy Sovereignty to increase tribal set-asides within state programs and funding opportunities.¹¹

Through collaboration with tribes, the Tribal Direct Install Program will contribute to the state's goal of 6 million heat pump installations by 2030, 3 million climate-ready and climate-friendly homes by 2030, and 7 million climate-ready and climate-friendly homes by 2035.¹²

The CEC is required to report progress toward these goals annually to the Legislature.¹³ See Chapter 4 for more information about data collection and reporting.

D. Budget

As of the release of these guidelines, the proposed budget for the Tribal Direct Install Program is about \$30 million. The program is funded predominantly by the Greenhouse Gas Reduction Fund as part of the California Climate Investments initiative overseen by the California Air Resources Board. See Chapter 5 for more information about California Climate Investments. Program funding may be adjusted.

10 [Docket 22-DECARB-03](https://efiling.energy.ca.gov/Lists/DocketLog.aspx?docketnumber=22-DECARB-03), <https://efiling.energy.ca.gov/Lists/DocketLog.aspx?docketnumber=22-DECARB-03>.

11 California Energy Commission. [Resolution Committing to Support California Tribal Energy Sovereignty](https://www.energy.ca.gov/filebrowser/download/5280), <https://www.energy.ca.gov/filebrowser/download/5280>

12 [Letter from Governor Newsom to Chair Liane Randolph](#), California Air Resources Board. July 22, 2022.

13 Public Resources Code Sections 25660.2 and 25665.7.

E. Funding Allocation for Tribes

All California Native American tribes will be eligible to participate and receive a minimum guaranteed funding allocation of \$75,000 to be spent on building decarbonization retrofits and related services. When tribes opt to participate in the program, they will have the option of requesting additional funds beyond the \$75,000 minimum.

Tribes who participate in the program will have the choice between the following two options:

1. Receive their funding allocation in the form of a grant and be responsible for implementing the program for their tribe.
2. Receive their funding allocation in the form of services from the program implementer, who will implement the program for the tribe.

Tribes opting to receive a direct grant are referred to in this document as *implementing tribes*. Tribes opting to receive services through the program implementer are referred to in this document as *nonimplementing tribes*.

Chapter 3 describes the program structure and application process for tribes.

CHAPTER 2:

Eligibility

A. Eligible Applicants

All California Native American tribes that are on the contact list maintained by the Native American Heritage Commission will be eligible to apply to participate in the program. The CEC will also release a competitive solicitation for a third-party program implementer. See Chapter 3 for details.

B. Retrofit Project Eligibility

Tribes will be responsible for identifying homes to be retrofitted through the program as described in Chapter 3. Households and residential properties must meet the following criteria to be eligible to be retrofitted through the Tribal Direct Install Program.

1. Eligible Building Types

The Tribal Direct Install program is limited to residential buildings within California, including:

- Single-family homes, including two- to four-unit residential properties.
- Multifamily residential properties of five or more units.
- Townhouses and condominiums.
- Farmworker housing consistent with the definition in Health and Safety Code Section 50199.7(h)(2).
- Residential buildings such as assisted living facilities, transitional housing, and group homes.
- Mixed-use buildings that include residential units. Only the residential portion, including common areas, is eligible for the program.
- Manufactured homes, mobile homes, and multifamily manufactured homes, as defined in Health and Safety Code Section 18007 et seq.

Nonresidential buildings used as emergency makeshift shelters, buildings used as vacation homes, and short term rental homes are not eligible under this program.

Eligible buildings may be either owner-occupied or rented. Manufactured homes are eligible regardless of whether the home or the land it sits upon is owned or rented by the occupant.

The Tribal Direct Install program is limited to residential buildings constructed before January 1, 2020. New construction is not eligible.

Buildings that meet the eligibility requirements for this program may also be eligible for the EBD Statewide Direct Install Program. However, a building may not participate in both programs.

2. Eligible Fuel Types

To be eligible, a building must use natural gas, propane, or another fossil fuel as the primary fuel for space heating or water heating.

3. Building Ownership

To be eligible, a building must be an occupied primary residence, and one of the following:

- Owned or managed by a California Native American tribe or a California tribal organization; or
- Owned by an enrolled member of a California Native American tribe who resides in California.

A California Native American tribe is defined as a tribe located in California that is on the contact list maintained by the Native American Heritage Commission for the purposes of Chapter 905 of the Statutes of 2004.

4. Building Location

Eligible buildings must be in California. They are not required to be on tribal land.

5. Household Income

The Tribal Direct Install program is intended to support low-income households, but the CEC is not establishing an income threshold. Participating tribes will be responsible for selecting homes to serve and will be expected to select households most in need of the benefits offered by the program. The CEC strongly recommends tribes prioritize low-income households when selecting homes to serve. See Chapter 3 for additional details.

C. Equipment Eligibility

1. Required Measures

All building retrofits conducted by the Tribal Direct Install program must, at a minimum, include the following elements:

- a. A heat pump water heater or a heat pump for space heating and cooling.
 - i. Heat pump water heaters must replace existing gas-fired¹⁴ water-heating equipment.
 - ii. A heat pump for space heating and cooling may replace an existing gas-fired, electric resistance, or wood-burning heat source. In some cases, the preexisting heating equipment may remain in the home, as described below:
 - In homes with preexisting gas-fired heating systems, the CEC recommends removal of the gas-fired equipment. However, the gas-fired equipment may remain in the home to serve as a backup to the

¹⁴ In this document, "gas-fired" refers to equipment fueled by natural gas, propane, or another fossil fuel.

heat pump at the request of the homeowner. EBD funds shall not be used to purchase gas-fired heating equipment.

- In homes that use a wood-burning heat source, a heat pump may be installed without removal of the wood-burning heat source. EBD funds shall not be used to purchase wood-burning heating equipment.
- b. At the conclusion of the retrofit, at least two of the following four end uses in the building must be electric: space heating, water heating, cooking, and clothes drying. Full building electrification is encouraged but not required.

2. Eligible Measures

Eligible measures for the program include efficient electric equipment, including, but not limited to, heat pump water heaters and heat pumps for space heating and cooling, as well as weatherization and energy efficiency improvements. See the EBD Statewide Direct Install Program Guidelines¹⁵, Eligible Measures table for a list of all eligible measures and detailed requirements associated with each eligible measure.¹⁶ Any future changes to the Eligible Measures table in the EBD Statewide Direct Install Program Guidelines will also apply to the Tribal Direct Install Program.

All work funded by the program must be done by a California licensed contractor. Work must comply with applicable standards and manufacturers' installation instructions and obtain required permits. All projects are required to comply with California's Building Energy Efficiency Standards. See Chapter 5, Section A, for more information about workforce requirements.

3. Ineligible Measures

The following measures are not eligible for funding through this program but may be installed in participating homes through coordination with complementary programs that offer these measures:

- Solar photovoltaic systems
- Battery storage not directly integrated into one of the four key appliances identified in the Required Measures section above
- Window replacement (other than for remediation/safety)

The following measures are not eligible for funding through this program:

- Any new system or equipment that uses natural gas, propane, or any other fossil fuel
- Installation of electric resistance heating to serve as the primary heat source for a home

15 Maneta, Diana. 2023. [Equitable Building Decarbonization Direct Install Program Guidelines](#). California Energy Commission.

16 In addition to the eligible measures listed in the Statewide Direct Install Program Guidelines, wiring to make the building solar-ready is also an eligible measure for the Tribal Direct Install Program.

4. Exceptions to Equipment Eligibility Requirements

An implementing tribe or the program implementer may submit a request to the CEC Executive Director to approve equipment that does not meet the eligibility criteria described in this chapter. Such requests must include documentation of the reason the exception is needed and specifications of the proposed substitute equipment in relation to the eligibility criteria described in this chapter. The proposed substitute equipment shall be selected to minimize any negative impact on the goals of the program (Chapter 1, Section C), shall not use natural gas, propane, or any other fossil fuel, and shall not be an ineligible measure. An approval to substitute equipment will be effective for a limited period specified by the Executive Director, not to exceed one year.

If an implementing tribe or the program implementer forecasts they may need to install ineligible equipment beyond the period approved by the Executive Director, the implementing tribe or program implementer shall submit a new request to the Executive Director at least three months prior to the approval's end term date.

5. Electrical Upgrades

As shown in the Eligible Measures section of the Statewide Direct Install Program Guidelines, upgrades to the electrical system of a building and upsizing of the electrical panel are eligible measures. However, the CEC encourages building retrofits that avoid the need for electrical panel upgrades, when possible and appropriate. While electrical panel upgrades may be needed in some homes, avoiding unnecessary panel upgrades will allow projects to be completed more quickly and at a lower cost. The program implementer shall encourage contractors to use strategies to avoid unnecessary panel upgrades, such as:

- Using the load calculation method described in California Electrical Code Section 220.87 to determine whether a panel upgrade is needed.
- Selecting low-power appliances, such as 120-volt (V) heat pump water heaters and heat pump clothes dryers, where appropriate.
- Installing automatic circuit-sharing devices as an alternative to upgrading the electrical panel, where appropriate.
- Avoiding the installation of space-heating and water-heating systems that have resistance heating elements, where appropriate.
- Using subpanels to make the addition of new circuits easier or when there are not enough open slots to accommodate new circuits in the existing panel.

Implementing tribes are also encouraged to use the strategies above to avoid unnecessary panel upgrades and reduce retrofit costs.

6. Equipment Removal

Replaced equipment must be removed from the site and properly recycled or disposed of in accordance with federal, state, and local regulations. Removal and disposal of appliances containing refrigerants with global warming potential greater than 150 must follow refrigerant

recovery procedures required by California Code of Regulations Section 95390 and Code of Federal Regulations Title 40, Part 82, Subpart F.

7. Eligible Use of Funds

In addition to the costs of eligible measures listed above, Tribal Direct Install Program funds may be used to cover associated costs, including installation labor, permitting, engineering design services for multifamily buildings, equipment removal and recycling/disposal, and Energy Code Compliance field verification and diagnostic testing. Tribal Direct Install Program funds may also be used to cover the costs of administrative activities necessary to implement the program, as described in Chapter 3, Section D, Roles and Responsibilities.

8. Cost Controls

The program implementer will be required to carry out mechanisms to control costs, which may include but are not limited to cost analysis, competitive bidding, bulk purchasing, and standard pricing for eligible measures. Implementing tribes will also be required to control costs through approaches which may include but are not limited to soliciting quotes from multiple contractors. The Tribal Direct Install program will cover 100 percent of the net cost of eligible measures for participating households after applying other applicable incentives.

The average per-home cost of remediation and safety measures for each tribe, including electrical panel and wiring upgrades, shall not exceed the maximums listed in Table 1. Capping the average, rather than per-home, remediation cost will allow each implementing tribe and the program implementer flexibility to serve homes with a range of remediation needs. **These cost caps apply only to the costs of remediation and electrical wiring/panel upgrades, including related labor. They do not apply to the costs of other eligible measures, including heat pumps for heating and cooling, heat pump water heaters, and other electric appliances. (See Eligible Measures section above.)** The implementing tribes and program implementer will be expected to collect detailed information on actual remediation measures and costs, and maximum costs may be adjusted based on this information.

Table 1: Maximum Average Remediation Costs

Type of Home	Maximum Average Cost for Remediation Measures
Single-family and multifamily buildings (per unit)	\$6,000
Manufactured and mobile homes	\$7,200

Source: CEC staff

CHAPTER 3:

Program Implementation

A. Program Structure

All California Native American tribes will be eligible to participate and receive a minimum guaranteed funding allocation of \$75,000 to be spent on building decarbonization retrofits and related services. When tribes opt to participate in the program, they will have the option of requesting additional funds beyond the \$75,000 minimum.

Tribes who participate in the program will have the choice between the following two options:

1. Receive their funding allocation in the form of a grant and be responsible for implementing the program for their tribe, or;
2. Receive their funding allocation in the form of services from the program implementer, who will implement the program for the tribe.

Tribes opting to receive a direct grant are referred to in this document as implementing tribes. Tribes opting to receive services through the implementer are referred to in this document as nonimplementing tribes.

Following the adoption of the Tribal Direct Install Program Guidelines, the CEC will release two solicitations – one for California Native American tribes seeking funding for eligible building decarbonization measures as described in Chapter 2 and a second for a program implementer. The program implementer and participants of the Tribal Direct Install Program are subject to applicable conflict of interest laws, rules, and regulations.

B. Application Process for Tribes

The application for California Native American tribes will consist of, at minimum:

- Indication of interest to participate in the Tribal Direct Install Program.
- Election to receive funding allocation either as a direct grant (participating as an implementing tribe) or in the form of services from the program implementer (participating as a nonimplementing tribe).
- General proposed project description.
- Request for additional funds, if any, beyond the \$75,000 minimum allocation. (See Request for Additional Funds section below.)

1. Application Period

The solicitation for the Tribal Direct Install Program's application for tribes will be posted on the CEC website. During the application period, the CEC will host virtual office hours to answer questions that tribes may have and assist with the application process, as needed.

At the conclusion of the application period, the CEC will process applications and finalize funding allocations based on requests received and subject to funding availability. If there are funds remaining after the solicitations for tribes and the program implementer are finalized, the CEC may provide a second phase application. A second phase application is not guaranteed.

2. Request for Additional Funds

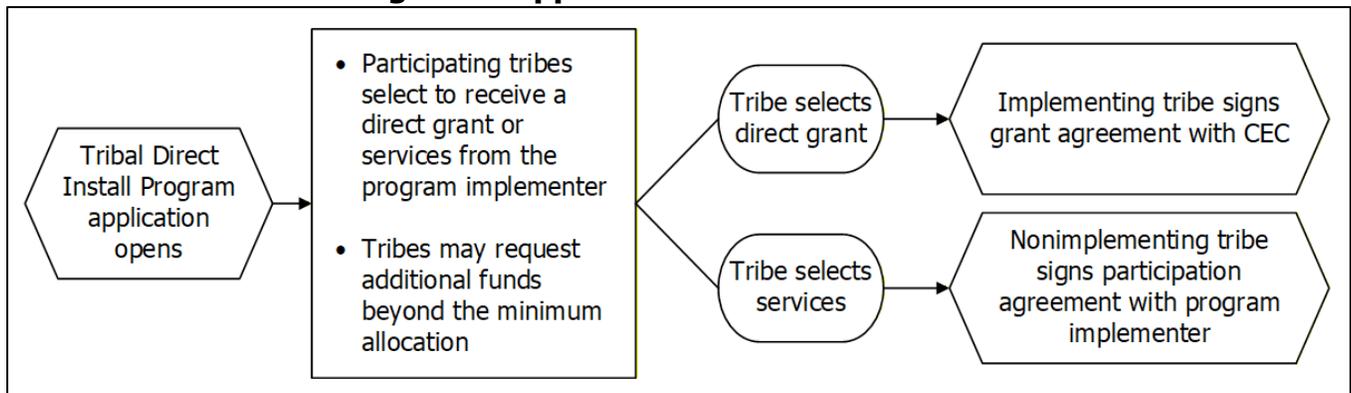
In the application period for tribes, participating tribes may request additional funds beyond the \$75,000 minimum allocation. After the application period has ended, CEC staff will determine the allocation of additional funds to California Native American tribes requesting more than the \$75,000 minimum allocation. Tribes are not guaranteed all additional requested funds, but they will be guaranteed the minimum allocation of \$75,000.

Criteria by which additional funds will be awarded may include, but are not limited to:

- Amount of remaining funding available.
- Number of tribal residents or homes proposed to be served.
- Description of housing stock and retrofit need.

Figure 1 illustrates the application process for all tribes.

Figure 1: Application Process for Tribes



Source: CEC staff

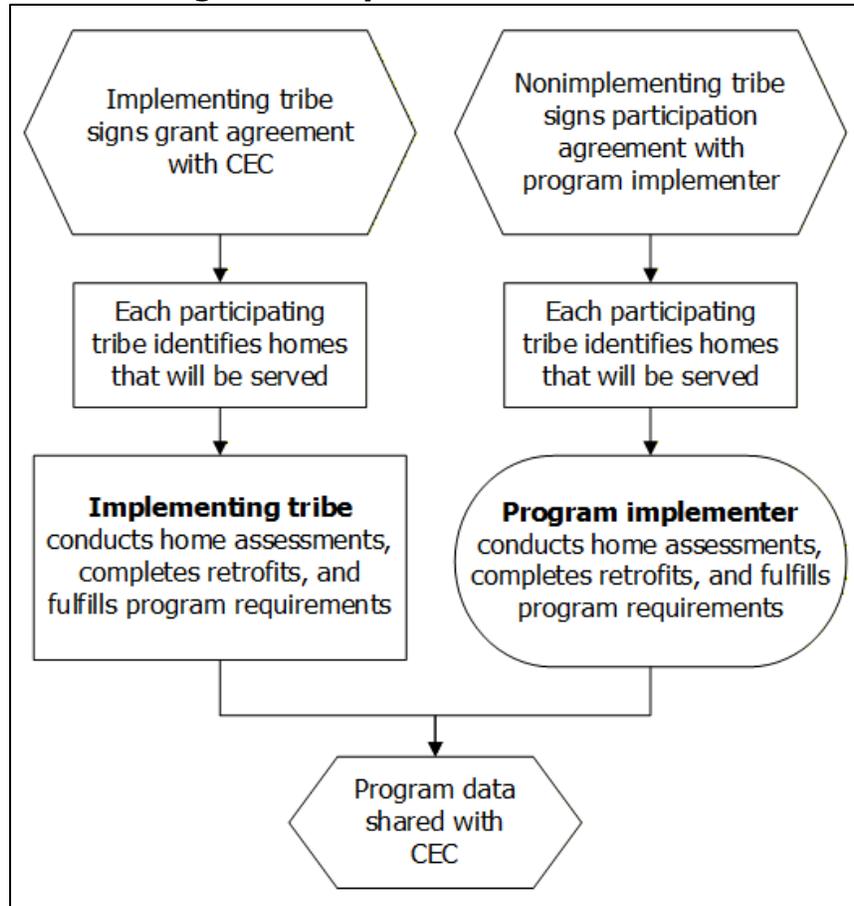
C. Program Implementer

Following the adoption of the program guidelines, the CEC will issue a competitive solicitation for a third party to serve as the program implementer. The program implementer will be responsible for implementing the Tribal Direct Install Program for nonimplementing tribes. Applications to serve as program implementer will not be limited to California Native American tribes or California tribal organizations. As noted above, the program implementer and participants of the Tribal Direct Install Program are subject to applicable conflict of interest laws, rules, and regulations.

D. Roles and Responsibilities

This section describes the roles and responsibilities of participating tribes and the program implementer. Figure 2 illustrates the process for program implementation.

Figure 2: Implementation Process



Source: CEC staff

Additional details on the tasks necessary to complete the program process are outlined in Table 2 and described in further detail below. CEC may provide additional tasks, roles, or responsibilities in the solicitation.

Table 2: Roles and Responsibilities of Tribes and Program Implementer

Task	Implementing Tribe's Responsibilities	Nonimplementing Tribe's and Program Implementer Responsibilities
Identify homes to serve	Implementing Tribe	Nonimplementing Tribe
Conduct home assessment	Implementing Tribe	Program Implementer
Contractor enrollment	Implementing Tribe	Program Implementer
Program coordination and layering	Implementing Tribe	Program Implementer
Retrofitting homes	Implementing Tribe	Program Implementer
Quality control	Implementing Tribe	Program Implementer
Reporting to CEC	Implementing Tribe	Program Implementer

Source: CEC staff

1. Identifying Homes and Households to Serve

Participating California Native American tribes will be responsible for identifying eligible homes and households to receive retrofits, as described in Chapter 2. When selecting households to serve, tribes will be responsible for ensuring that buildings are owned by enrolled tribal members or owned or managed by the tribe or a tribal organization. In addition, the Tribal Direct Install program is limited to residential buildings constructed before January 1, 2020. New construction is not eligible. Tribes are encouraged to take the following criteria into consideration when selecting homes to serve:

- Low-income households.¹⁷
- Households with a high energy cost burden.
- Homes vulnerable to extreme heat/cold weather conditions.
- Homes occupied by vulnerable tribal members, such as the elderly, young children, or those living with disabilities or chronic illnesses.

The CEC strongly recommends tribes prioritize low-income households when selecting homes to serve.

¹⁷ Tribes may define low-income with reference to the [income limits](https://www.hcd.ca.gov/grants-and-funding/income-limits/state-and-federal-income-rent-and-loan-value-limits) developed by the California Department of Housing and Community Development (https://www.hcd.ca.gov/grants-and-funding/income-limits/state-and-federal-income-rent-and-loan-value-limits), or they may use their own definition.

Table 3 summarizes the roles and responsibilities of each party related to identifying homes to serve.

Table 3: Roles and Responsibilities - Identifying Homes to Serve

Party	Role
Implementing tribes	Identify eligible homes to serve
Nonimplementing tribes	Identify eligible homes to serve
Program implementer	Program Implementer will not be responsible to identify the homes or criteria for eligible homes to serve. However, program implementer can assist nonimplementing tribes with identifying eligible homes to serve, upon request. Develop educational materials and coordinate with participating tribes to help engage with tribal members.

Source: CEC staff

2. Home Assessments and Identification of Retrofit Measures

Implementing tribes and the program implementer will be responsible for conducting assessments of homes to be retrofitted. A home assessment gauges the existing condition of the home and guides the selection of recommended retrofit measures for the home.

A recommended approach to the home assessment includes the following elements:

- Interview with the homeowner/occupant about any concerns or issues they may have related to the performance of their home
- Evaluation of the home systems/appliances for heating, cooling, water heating, clothes drying, cooking, and lighting
- Evaluation of the home insulation level, air leakage, duct work, and air filtration
- Identification of any electrical hazards and evaluation of the main electrical panel condition, open slot availability, and capacity to support full home electrification
- Identification of building-related health and safety conditions that may require remediation to allow for the installation of electric equipment and other decarbonization measures

Implementing tribes and the program implementer will be responsible for using the information collected in the home assessment to identify recommended measures for the home from among the EBD-eligible measures described in Chapter 2.

Before conducting retrofits, implementing tribes and the program implementer will be responsible for ensuring that project information is communicated clearly to property owners and occupants. Project information communicated to the property owner and occupant shall include, but is not limited to:

- Measures to be installed, including how to use and warranty information.

- Benefits and energy bill impacts expected from installed measures.
- Expected duration of construction and construction hours.
- Number to call regarding any concerns related to a project funded by this program.

Table 4 summarizes the roles and responsibilities of each party related to home assessments and identification of retrofit measures.

Table 4: Roles and Responsibilities - Home Assessments and Identification of Retrofit Measures

Party	Role
Implementing tribes	Conduct home assessments, identify recommended measures for the home, and ensure that project information is communicated clearly to the property owner/occupant. These tasks may be performed by qualified tribal staff or third party hired by the tribe.
Nonimplementing tribes	Option to coordinate with the program implementer to facilitate communication with the household occupants regarding the home assessment and project information.
Program implementer	Conduct home assessments, identify recommended measures for the home, and ensure that project information is communicated clearly to the property owner/occupant. These services are for nonimplementing tribes only.

Source: CEC staff

3. Contractor Enrollment

Details on contractor enrollment and workforce requirements can be found in Chapter 5, Section A: Workforce Requirements.

Table 5 summarizes the roles and responsibilities of each party related to contractor enrollment.

Table 5: Roles and Responsibilities - Contractor Enrollment

Party	Role
Implementing tribes	May hire contractors of their choice who meet the training and experience requirements described in Chapter 5. Will have the option of selecting from a list of enrolled contractors prepared by the program implementer.
Nonimplementing tribes	Option to recommend qualified contractors to the program implementer for potential inclusion on the enrolled contractors list.
Program implementer	Perform outreach to a diverse set of qualified, licensed contractors, with a focus on local contractors that meet one or more of the criteria listed in Chapter 5. Establish a list of enrolled contractors who meet the training, license, and experience requirements described in Chapter 5 and who will conduct all home retrofits. Provide the list of enrolled contractors to implementing tribes upon request. Must comply with tribal employment ordinances where applicable.

Source: CEC staff

4. Program Coordination and Layering

Other federal, state, utility, regional, and local programs offer incentives to advance energy efficiency, weatherization, and decarbonization in California tribal homes. The CEC encourages coordination and layering with other relevant programs or funding sources where applicable to maximize the number of eligible households that benefit from the Tribal Direct Install Program.

Program coordination may include:

- Coordination with programs that provide funding for one or more measures that are also eligible through the Tribal Direct Install Program, such as remediation, smart thermostats, electrical panel upgrades, or heat pumps. Other or layered funding sources should be applied to a project before Tribal Direct Install Program funds are applied, whenever possible.
- Coordination with programs that provide funding for complementary measures that are not eligible for Tribal Direct Install Program funding, such as solar photovoltaic panels, electric vehicle charging, shade trees, and battery storage.

Table 6 summarizes the roles and responsibilities of each party related to program coordination and layering.

Table 6: Roles and Responsibilities - Program Coordination and Layering

Party	Role
Implementing tribes	Option to identify, apply for, coordinate, and fulfill the requirements of any additional programs to be layered with EBD funds.
Nonimplementing tribes	Option to communicate additional priorities to the program implementer to help identify relevant funding opportunities or programs.
Program implementer	Identify complementary funding sources based on availability and tribal priorities. For nonimplementing tribes, apply for and fulfill the requirements of complementary programs on behalf of participating households. Create a list of relevant programs and provide that information to implementing tribes upon request.

Source: CEC staff

5. Retrofitting Homes

The home retrofit process will include the installation of appropriate eligible measures identified in the home assessment, programming of equipment (including set up of load-shifting equipment to avoid the region's peak energy hours), and removal and proper recycling or disposal of old appliances, refrigerants, and debris.

All work funded by the program must be done by a California licensed contractor. Work must comply with applicable standards and manufacturers' installation instructions and obtain required permits. All projects are required to comply with California's Building Energy Efficiency Standards.

Project construction should be limited to 30 days, whenever possible. Projects should be designed to minimize disruption to occupants, avoid the need for temporary displacement if possible, and reduce the duration of displacement if it is necessary.

Table 7 summarizes the roles and responsibilities of each party related to retrofitting homes.

Table 7: Roles and Responsibilities - Retrofitting Homes

Party	Role
Implementing tribes	Schedule contractors and coordinate with household occupants to carry out retrofits.
Nonimplementing tribes	Option to assist the program implementer to ensure household is aware of the retrofit timeline and coordinate with the occupants as needed.
Program implementer	Schedule contractors and coordinate with household occupants to carry out retrofits. These services are for nonimplementing tribes only.

Source: CEC staff

6. Quality Control

Quality control is intended to ensure the successful operation of installed, eligible equipment. Quality control includes ensuring that the equipment was installed correctly, is operating as expected, and that households have the means to reach out for support, if needed. Quality control must include, but is not limited to, review of photos of the project provided by the contractor.

Table 8 summarizes the roles and responsibilities of each party related to quality control.

The CEC may elect to audit or visit retrofit sites to verify work completeness and ensure quality control and compliance with program requirements. The participating tribes and program implementer shall assist and facilitate this process as required.

Table 8: Roles and Responsibilities - Quality Control

Party	Role
Implementing tribes	Establish a means for quality control of work associated with eligible measure installation. Ensure that households receive operating instructions and warranty information for installed equipment and have a point of contact if any problems arise post installation. Ensure participating households are enrolled in the most appropriate rate plan available from their utility, as well as any rate discounts and demand response program for which they are eligible. Conduct follow-up surveys of participating households.
Nonimplementing tribes	Option to assist the program implementer with quality control.
Program implementer	Establish a means for quality control of the work associated with installation. Ensure that households receive operating instructions and warranty information for installed equipment and have a point of contact if any problems arise post installation. Ensure households are enrolled in the most appropriate rate plan available from their utility, as well as any rate discounts and demand response programs for which they are eligible. Conduct follow-up surveys of participating households. Survey questions may be shared with the implementing tribes, upon request. These services are for nonimplementing tribes only.

Source: CEC staff

7. Reporting

Implementing tribes and the program implementer will be required to report detailed project-level data to the CEC and assist in meeting reporting obligations to the Legislature and the California Air Resources Board. See Chapter 4 for additional details.

Table 9 summarizes the roles and responsibilities of each party related to reporting.

Table 9: Roles and Responsibilities - Reporting

Party	Role
Implementing tribes	Collect and report on specified data from program activities as described in Chapter 4.
Nonimplementing tribes	Option to assist the program implementer with reporting.
Program implementer	Collect and report on specified data from program activities for nonimplementing tribes as described in Chapter 4. These services are for nonimplementing tribes only.

Source: CEC staff

E. Program Cost Categories

The funds for this program will be separated into three categories: Project Costs, Project-Related Costs, and Administrative Costs. Table 10 below defines these three cost categories and illustrates which activities they apply to.

Table 10: Program Cost Categories

Funding Type	Application
Project Costs	Cost of home retrofit, including equipment, permits, and installation labor.
Project-Related Costs	Activities directly related to home retrofits, not including the retrofit itself. This includes identifying homes to serve, home assessments, quality control, and follow-up surveys.
Administrative Costs	All other costs necessary for the effective administration of the program, including, but not limited to, contractor enrollment, program coordination and layering, and reporting. A maximum of 15 percent of the total funds received by implementing tribes and program implementer may be spent on administrative costs.

Source: CEC staff

CHAPTER 4:

Data Collection and Reporting

The program implementer and implementing tribes will be required to collect and report specified data from Tribal Direct Install program activities and submit the data to the CEC. This data will be used to inform the CEC's required reporting to the California Air Resources Board (CARB) as part of California Climate Investments, as well as the CEC's required reporting to the Legislature under Public Resources Code Sections 25660.2 and 25665.7.

All individuals and entities participating in the program must follow all applicable laws, including to protect all confidential information and personal information from unauthorized disclosure. These protections include, but are not limited to, implementing administrative, physical, and technical safeguards that reasonably and appropriately protect the privacy, confidentiality, security, integrity, and availability of confidential information, including electronic and computerized confidential information. Program related data that the CEC makes publicly available will be aggregated and anonymized to protect any personal and household identifiable information.

At a minimum, the CEC will collect the following data on each household retrofitted by the program:

- Home address
- Number of household members
- Name of tribe
- Whether the household is low-income¹⁸
- Measures installed in the home
- Equipment removed
- Estimated energy savings of the project (electricity and gas)
- Gas and electric utility names and meter numbers
- Total project cost
- Project labor and equipment costs, separated
- Project start and end date

¹⁸ Tribes may define low-income with reference to the income limits developed by the [Department of Housing and Community Development](https://www.hcd.ca.gov/grants-and-funding/income-limits/state-and-federal-income-rent-and-loan-value-limits) (<https://www.hcd.ca.gov/grants-and-funding/income-limits/state-and-federal-income-rent-and-loan-value-limits>), or they may use their own definition.

In addition to data about homes receiving retrofits, implementing tribes and the program implementer will be required to report data about workers paid with funding from the Tribal Direct Install program. To meet California Climate Investments reporting requirements, the CEC will need to collect the following data for each worker employed by the program:

- Level of education or training or both required for the position
- Benefits received, including employer-paid health insurance, paid leave, a retirement plan, or a combination
- Whether the position is subject to public works requirements
- Hourly wages
- Total project work hours

In addition to the data fields above, the program implementer will be required to report detailed project-level data to the CEC. Data will be collected at the time of initial enrollment, home assessment, installation of retrofit measures, and for up to 12–24 months after installation. Implementing tribes will have the option to either report project-level data to a specified automated system, or utilize CEC provided templates for reporting purposes.

To satisfy the reporting requirements for CARB, the CEC will work with CARB to develop consistent methods for measuring greenhouse gas emissions reductions and other economic, environmental, and public health cobenefits.

The CEC will also use utility meter data to measure actual energy savings and utility bill impacts for participating households after retrofits have been completed. For the CEC to measure actual energy savings, the implementing tribe and program implementer will be required to work with the home occupant to obtain consent to share their utility meter data. CEC will also require household energy use and cost information for propane or other fuel types.

CHAPTER 5:

Administration

A. Workforce Requirements

All work funded by the Tribal Direct Install Program must be done by a California licensed contractor. Work must comply with applicable laws, ordinances, standards, and manufacturers' installation instructions and obtain required permits. All projects are required to comply with California's Building Energy Efficiency Standards. Implementing tribes and the program implementer shall be responsible for ensuring households receive high-quality installations.

To encourage the creation of local, high-quality jobs in the communities served, the program implementer shall establish a list of enrolled contractors who meet the training and experience requirements listed below. The CEC encourages tribal members who meet program requirements be included in the workforce, wherever possible. The implementer must comply with tribal employment ordinances, where applicable.

Implementing tribes may hire contractors of their choice and will have the option of selecting from the list of enrolled contractors prepared by the program implementer. Contractors will need to meet the training and experience requirements, and obtain the necessary licenses for the program.

1. Training and Experience Requirements

The implementer shall establish minimum training and experience requirements for construction workers, including hands-on training to install equipment and appliances eligible for the program.

The following requirements apply to contractors hired by both implementing tribes and the program implementer. In addition to any legal requirements, workers who have either (1) graduated from a state-approved apprenticeship program or (2) possess at least three years of relevant installation experience and have received training and certification in the type of equipment being installed shall be deemed to have adequate training. At least one-third of all construction workers on a project shall meet the established minimum training and experience requirements. All electrical panel upgrades shall be installed by electricians licensed by the Contractors State Licensing Board.

2. Contractor Outreach

When developing the list of enrolled contractors, the program implementer shall perform outreach to a diverse set of licensed contractors, with a focus on local contractors that meet one or more of the following criteria:

- Comply with "skilled and trained workforce" standards as defined in Public Contracts Code Section 2600, et seq.
- Are based in the community or county where the work will occur.

- Have experience working in tribal communities or geographically isolated communities.
- Participate in relevant state-approved apprenticeship programs.
- Employ targeted hiring strategies to create jobs for residents of tribal, underresourced, or low-income communities, and individuals with barriers to employment.¹⁹

3. Prevailing Wage

Under Public Resources Code Section 25665.3(f), “Projects funded pursuant to the direct install program shall be performed by workers paid prevailing wage where possible and when applicable.” Building retrofits conducted using EBD Direct Install Program funds, including the Tribal Direct Install Program, may trigger public works laws (Labor Code Section 1720, et seq.), a requirement of which is to pay prevailing wages. Implementing tribes and the program implementer are fully responsible for complying with all applicable laws, which can include California public works requirements.

B. Tenant Protections

The purpose of tenant protections is to avoid negative effects on tenants in buildings served by the Tribal Direct Install Program. It is important to avoid the possibility of tenants being evicted or their rent being increased as a result of retrofits funded by the program.

The CEC encourages participating tribes to ensure that tenants in any rented buildings served by the program are protected.

Project construction shall be limited to 30 days, whenever possible. Projects should be designed to minimize disruption to occupants, avoid the need for temporary displacement if possible, and reduce the duration of displacement if it is necessary.

C. California Climate Investments

The EBD Program is funded predominantly by the Greenhouse Gas Reduction Fund as part of the California Climate Investments initiative (CCI). CCI is overseen by the California Air Resources Board and is a statewide program that puts billions of Cap-and-Invest Program (formerly known as the Cap-and-Trade Program) dollars to work reducing greenhouse gas emissions, strengthening the economy, and improving public health and the environment, particularly in disadvantaged communities.

The Cap-and-Invest Program also creates a financial incentive for industries to invest in clean technologies and develop innovative ways to reduce pollution. CCI projects include affordable housing, renewable energy, public transportation, zero-emission vehicles, environmental restoration, more sustainable agriculture, recycling, and much more. At least 35 percent of these investments are within and benefiting residents of disadvantaged communities, low-

¹⁹ “Individual with a barrier to employment” is defined in the federal [Workforce Innovation and Opportunity Act of 2014](https://www.congress.gov/113/bills/hr803/BILLS-113hr803enr.pdf), Section 3, Part 24, <https://www.congress.gov/113/bills/hr803/BILLS-113hr803enr.pdf>.

income communities, and low-income households across California. For more information, visit the [California Climate Investments website](https://www.caclimateinvestments.ca.gov) at <https://www.caclimateinvestments.ca.gov>.

Programs part of CCI are required to meet minimum levels of investments to projects that benefit residents of disadvantaged communities, low-income communities, and low-income households, collectively referred to as “priority populations.” The following investment targets have been established for the EBD program portfolio as a whole:

- 60 percent of funds targeted to households in disadvantaged communities
- 5 percent of funds targeted to households outside but within one half-mile of a disadvantaged community
- 25 percent of funds targeted to low-income communities or households
- 90 percent of funds targeted to priority populations.

While the CEC is not imposing explicit requirements on this program related to the amount of funding spent in disadvantaged communities, low-income communities, or low-income households, some households served by the program will naturally fall into these categories and contribute to achieving these targets for the portfolio of EBD programs.

As required by CCI, the CEC will use benefit assessments tools to determine if projects have a direct benefit to priority populations. Benefit assessments tools for this program will be available at arb.ca.gov/cci-resources.

D. Guidelines Authority

These program guidelines are adopted under Public Resources Code Division 15, Chapter 7.6, added by Assembly Bill 209 (Committee on Budget, Chapter 251, Statutes of 2022), which directs the CEC to establish the Equitable Building Decarbonization Program. Under Public Resources Code Section 25665.6, the Administrative Procedure Act (Chapter 3.5 [commencing with Section 11340] of Part 1 of Division 3 of Title 2 of the Government Code) does not apply to the adoption of these guidelines.

E. Effective Date of Guidelines

The Tribal Direct Install Program guidelines will take effect only after they have been adopted by the California Energy Commission at a CEC business meeting. Once finalized, the CEC will post the adopted guidelines on the [EBD Program web page](https://www.energy.ca.gov/programs-and-topics/programs/equitable-building-decarbonization-program) (<https://www.energy.ca.gov/programs-and-topics/programs/equitable-building-decarbonization-program>).

F. Interpretation

Nothing in these guidelines shall be construed to abridge the powers or authority of the CEC or any CEC-designated committee as specified in Division 15 of the Public Resources Code, commencing with Section 25000, or Division 2 of Title 20 of the California Code of Regulations, commencing with Section 1001.

G. Changes to Guidelines

1. Substantive Changes

After adoption, substantive changes to the program Guidelines may be made with the approval of the CEC at a publicly noticed meeting. Before adopting any substantive changes to the guidelines, CEC staff will provide an opportunity for public comment and host at least one staff workshops to discuss the proposed changes. Notice of the workshop and adoption of the changes shall be provided to the associated CEC subscription lists, the CEC website, and the program docket. Unless stated otherwise in the resolution approving the substantive changes, such changes shall take effect upon adoption by the CEC.

2. Nonsubstantive Changes

If the program guidelines require nonsubstantive changes, such as reorganization of text, grammatical corrections, or other changes that do not materially affect the program, CEC staff will provide a notice of the changes to the associated CEC subscription lists, the CEC website, and the program docket. A public workshop may be held.

H. California Environmental Quality Act

In general, the CEC must comply with the California Environmental Quality Act (CEQA),²⁰ which requires public agencies to identify and consider potential environmental impacts of proposed projects when a public agency supports proposed projects with grants or other subsidies.²¹

The CEC has determined that the development of these guidelines is not a project for purposes of CEQA. However, if the guidelines are deemed a project, the CEC has found they are exempt from CEQA under California Code of Regulations, Title 14, Sections 15307 and 15308. These provisions exempt actions taken by a regulatory agency pursuant to state law to “assure the maintenance, restoration, or enhancement of a natural resource” and actions taken to “assure the maintenance, restoration, enhancement, or protection of the environment” where the action involves procedures for protection of the environment.

The CEC has also determined that the guidelines are exempt from CEQA under the common-sense exemption, California Code of Regulations, Title 14, Section 15061(b)(3), because there is no possibility that the guidelines may have a significant effect on the environment, as defined by CEQA.

20 Public Resources Code Section 21000 et seq.; see also California Code of Regulations, Title 14, Section 15000 et seq.

21 Public Resources Code Section 21065(b).

CHAPTER 6:

Glossary

Term	Definition
Area median income (AMI)	Median household income based on household size of a geographic area of the state, as updated annually by the Department of Housing and Community Development.
California Energy Commission (CEC)	California’s primary energy policy and planning agency.
California Native American tribe	Native American tribe located in California that is on the contact list maintained by the Native American Heritage Commission for the purposes of Chapter 905 of the Statutes of 2004.
California tribal organization	A corporation, association, or group controlled, sanctioned, or chartered by a California Native American tribe that is subject to its laws, the laws of the State of California, or the laws of the United States.
Confidential information	Information the CEC has designated as confidential pursuant to Title 20 of the California Code of Regulations, Section 2505 et seq., information that the CEC has otherwise deemed or stated to be confidential, and other information exempt from disclosure under the Public Records Act or any other applicable state or federal laws.
Carbon neutrality	A state of net-zero greenhouse gas emissions, in which greenhouse gases emitted to the atmosphere are balanced in equal measure by greenhouse gases removed from the atmosphere.
Decarbonization	Activities that reduce or eliminate greenhouse gas emissions, such as replacing the use of fossil fuels (in buildings, vehicles, industry, and electric power generation) with clean and renewable technologies.
Disadvantaged community	An area identified as disadvantaged by the California Environmental Protection Agency per Senate Bill 535 (Chapter 830, Statutes of 2012) based on geographic, socioeconomic, public health, and environmental hazard criteria. A map of disadvantaged communities is available at https://calepa.ca.gov/EnvJustice/GHGInvest/
Energy burden	The percentage of household income spent on energy costs.
Global warming potential (GWP)	A measure of how much energy the emissions of 1 ton of a greenhouse gas will absorb over a given period of time (usually 100 years), relative to the emissions of 1 ton of carbon dioxide.
Greenhouse gas (GHG)	Gases that trap heat in the atmosphere, such as carbon dioxide (CO ₂), methane (CH ₄), and nitrous oxide (N ₂ O).
Heat pump	An appliance that uses electricity to transfer heat from a cool space to a warm space, providing an energy-efficient way to heat and cool buildings or heat water.

Term	Definition
High-quality job	A job that promotes economic mobility by providing retirement benefits, vacation and sick leave, training opportunities, and wages at or above the average median wage of a region.
Implementing tribe	For this document, a California Native American tribe that chooses to participate in the program and receive a direct grant to perform decarbonization retrofits and related services.
Low-income community	A census tract with a median household income at or below 80 percent of the statewide median income, or a census tract with a median household income at or below the threshold designated as low-income by the Department of Housing and Community Development.
Low-income household	A household earning 80 percent or less of the area median income. Low-income thresholds by county and household size are available from the Department of Housing and Community Development at https://www.hcd.ca.gov/grants-and-funding/income-limits
Nonimplementing tribe	For this document, California Native American tribe that chooses to participate in the program and receive decarbonization retrofits and related services from the program implementer.
Personal Information	Information that is maintained by an agency that identifies or describes an individual, including, but not limited to, the individual's name, social security number, physical description, home address, home telephone number, education, financial matters, and medical or employment history. It includes statements made by, or attributed to, the individual.
Priority population	For California Climate Investments, priority populations include disadvantaged communities, low-income communities, and low-income households. A map of priority populations is available at https://qis.carb.arb.ca.gov/portal/apps/experiencebuilder/experience/?id=5dc1218631fa46bc8d340b8e82548a6a&page=Priority-Populations-4_0 .
Program Implementer	For this document, a competitively selected entity that will provide decarbonization retrofits and related services for California Native American tribes that choose to participate in the Tribal Direct Install program as a nonimplementing tribe (i.e. not to receive a direct grant).
Retrofit	For this document, upgrades to an existing residential building such as installation of heat pumps, installation of other efficient electric appliances, and other eligible decarbonization improvements.
Tribal member	An individual living in California who is an enrolled member of a Native American tribe located in California that is on the contact list maintained by the Native American Heritage Commission for the purposes of Chapter 905 of the Statutes of 2004.
Underresourced community	A disadvantaged community or a low-income community.