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**Equitable Building Decarbonization
Statewide Direct Install Program
Pre-Application Workshop
Zoom Transcript
May 10, 2024**

Slide 1: Minutes 00:00-02:48

Susan Mills: Alright, good morning everyone. Just opening up zoom for everyone to join, and we'll give it a few minutes before we start. Morning, everyone. We're just giving it a couple minutes for people to log in, and then we'll get started. Alrighty...well, we'll give it just a little bit more time we're getting- some people are still maybe coming in. Hope everyone's having a great morning, Happy Friday. Still, people are slowly coming in so little bit more time. Alright, well we'll go ahead and get started.

Good morning, everyone. Welcome to the Pre-Application Workshop for Grant Funding Opportunity 23-404 to select regional administrators for the Equitable Building Decarbonization Direct Install Program. I'm Susan Mills, Supervisor in the Equitable Building Decarbonization Branch at the California Energy Commission. Next slide, please.

Slide 2: Minutes 02:50-03:15

Susan Mills: In today's workshop, we will provide some background and an overview of this Grant Funding Opportunity, details of the solicitation documents and the process to apply, followed by a QA- answer- Question and Answer session. Please note that while the workshop is scheduled to end at noon, it may end earlier or later depending on the number of questions received during the Question-and-Answer period. Next slide.

Slide 3: Minutes 03:17-06:02

Susan Mills: I'll start with a few logistical announcements, and then we will get into the substance of today's workshop.

First, you can find the full Grant Funding Opportunity that we're discussing today at the URL shown on the screen. We will also put that link in the chat. Please note that in today's workshop we will use the terms "GFO" and "solicitation" interchangeably to refer to this Grant Funding Opportunity. We will also use the initials "EBD" to refer to the Equitable Building Decarbonization Program. Please be aware that this workshop is being recorded and a link to the recording transcript and presentation will be posted to the CEC's website.

We encourage you to sign into the workshop using the optional sign-in sheet. The link will be in the chat and responses from the sign-in sheet will be posted to the docket after the workshop. If you are considering submitting an application to this GFO, either as a Regional Administrator or part of a team, you can use this as a way to find potential team members.

Later in the workshop, we will also introduce a website called Empower Innovation, which we encourage you to use as another way to find partners. During the workshop, you may ask a question regarding the solicitation and the process for applying using the Zoom Question and Answer feature. There will also be a Q&A session at the end of the workshop, during which you may ask questions verbally, and we will do our best to respond. After the workshop, questions may be submitted by email to the Commission Agreement Officer, Marissa Sutton at the website on the slide, marissa.sutton@energy.ca.gov. Please write- please be sure to write GFO-23-404 in the subject line of your email. The last day to submit written questions is next Wednesday, May 15th. We plan to post written responses to all questions by May 30th.

And Marissa is here! If you want to come on the line and just give a wave, say, hi to folks. Put a- there she is! Thanks, Marissa. Just put a face to the name. That's our Commission Agreement Officer, really grateful to have her on the on the team here.

Marissa Sutton: Thank you Susan.

Susan Mills: Welcome. So please note that all questions must be directed to Marissa Sutton. Please do not contact any other CEC staff with questions or comments on the GFO, as we are prohibited from discussing it at this time, and will simply refer you to Marissa.

Now I will pass this on to my colleague in the branch, Diana Maneta.

Slide 4: Minutes 6:04-6:12

Diana Maneta: Thank you, Susan. I'll be providing a little bit of background on the Equitable Building decarbonization program before we turn to the GFO.

Slide 5: Minutes 6:13-7:04

Diana Maneta: The CEC was directed by Assembly Bill 209 in 2022 to create the Equitable Building Decarbonization Program. At the state level, the program is funded by the General Fund and the Greenhouse Gas Reduction Fund administered by the Air Resources Board. The CEC also plans to supplement the budget for this program with federal funding through the Inflation Reduction Act Home Efficiency Rebates Program.

The EBD program will include several components: a Statewide Direct Install Program, a Tribal Direct Install Program, and a Statewide Incentive Program. The GFO we're discussing today is for the Statewide Direct Install program. Guidelines for this program were developed through a public process and adopted by the Commission in October of last year. In the next few slides, I'll describe the design of the program based on the adopted Guidelines.

Slide 6: Minutes 7:06-7:31

Diana Maneta: The primary goals of the EBD Program are to reduce greenhouse gas emissions and to advance energy equity. The program is also intended to advance several secondary

goals which include improving resiliency to extreme heat, improving air quality, improving energy affordability, supporting grid reliability, supporting the local workforce, and supporting the Governor's goal of 6 million heat pump installations by 2030.

Slide 7: Minutes 7:33-7:31

Diana Maneta: A Direct Install Program is a type of incentive program that provides and installs energy efficient electric appliances, energy efficiency measures and related upgrades directly to consumers at minimal or no cost. The EBD Direct Install Program will serve low-income households located in underresourced communities. Low-income households are defined as households earning up to 80% of the area median income. Participating households may be single-family homes, multifamily buildings, or manufactured or mobile homes. They may be owner-occupied or rented, and the program will include renter protections. Underresourced communities include disadvantaged communities as defined by the California Environmental Protection Agency as well as census tracts with a median household income at or below 80% of the statewide median income and census tracts with a median household income at or below 80% of the area median income for the county.

I want to note that this program is not restricted to certain utility service territories. Customers of any utility in the state are potentially eligible to participate. Overall, about a third of California households are low-income, and more than half of Californians live in underresourced communities. Though the funding for this program is significant, it's far from enough to serve every underresourced community in the state. Therefore, the initial phase of the program will serve what we're calling "initial community focus areas."

Slide 8: Minutes 9:05-10:02

Diana Maneta: Initial Community Focus Areas will be identified by regional administrator applicants in their proposals, and should be selected based on several criteria, including the presence of local organizations with which the administrator can partner for effective outreach and engagement in the community; communities in which households are most likely to experience utility bill savings as a result of decarbonization; communities particularly vulnerable to extreme heat, high fire risk, and high levels of ambient air pollution; communities underserved by existing decarbonization, and weatherization programs and communities with high energy burdens. In addition, within initial community focus areas, the program will use data, including interval meter data, to identify households that are the best candidates for decarbonization, in particular, households most likely to experience savings on their energy bills as a result of decarbonization upgrades.

Slide 9: Minutes 10:04-10:59

Diana Maneta: Participating households will receive decarbonization upgrades at no cost- excuse me- no cost to the building owner or occupant. Measures that are eligible to be funded through the program are listed on this slide. They include heat pumps, heat pump water heaters, other efficient electric appliances, weatherization, upgrades, electrical wiring and

panel upgrades, and remediation and safety improvements. Not every household that participates in the program will receive every measure on this list.

Some measures will be more appropriate for certain homes than others, based on climate zone, building type, or other factors. At a minimum, each household served will receive a heat pump for space heating and cooling, or a heat pump, water heater, or both. In addition, at the conclusion of the retrofit, at least two of the following four end uses in the home must be electric. Those four are: space heating, water heating, cooking, and clothes drying.

Slide 10: Minutes 11:01-11:35

Diana Maneta: The Statewide Direct Install Program will be administered by three regional administrators serving Northern, Central, and Southern California. The administrators will be selected through the GFO that's the focus of today's workshop. Program funds will be split among the three regions in proportion to the population of underresourced communities in each region, which means 23 percent to the Northern region, 19 percent to the Central region, and 58 percent to the Southern region. I'll show the actual budgets for each region in a few minutes. Next slide.

Slide 11: Minutes 11:36-11:53

Diana Maneta: Now we'll turn to an overview of the Grant Funding Opportunity GFO 23-404. If you have questions about the GFO as I'm presenting, you can type them into the Zoom Q&A. And, as Susan mentioned, there will also be an opportunity to ask questions verbally later in the workshop.

Slide 12: Minutes 11:55-12:28

Diana Maneta: First, here's the timeline of next steps. The solicitation was posted on April 30 and now we're here today at the pre-application workshop indicated with the star. As Susan mentioned, we'll be accepting written questions on the solicitation through May 15, and we anticipate posting answers to those questions by May 30. The deadline to submit applications is June 28. We plan to post the notice of proposed awards on August 2 and we're aiming to take agreements to the CEC Business Meeting on or before December 11.

Slide 13: Minutes 12:30-13:42

Diana Maneta: As of last year's adopted state budget, the state has allocated \$922 million to the Equitable Building Decarbonization Program. Of that, CEC has allocated \$689.8 million to the Direct Install Program. This table shows the available state funds for the three regional administrators that will be selected through this GFO. There will also be federal funding available, which I'll show on the next slide. As I mentioned, earlier funds will be divided among the three regions in proportion to the population of underresourced communities in each region. As this table shows, up to 10 percent of the total budget in each region may be used

for administrative costs, and the remainder must be used for project and project-related costs. I'll share the definitions of those cost categories shortly.

For those who reviewed the draft of this solicitation that was released in March, you may note that this administrative cap has been increased from 5 percent to 10 percent for the state portion of the funding. As you may be aware, California is facing a budget shortfall, and cuts to this program's budget are possible. We'll share information about any confirmed changes to this budget as soon as we receive it.

Slide 14: Minutes 13:44-14:40

Diana Maneta: In addition to state funding, the CEC plans to incorporate federal funding into the EBD Direct Install Program. The Federal Inflation Reduction Act allocated \$292 million to California for the Home Efficiency Rebates Program, also called HOMES.

California, like all states, has to go through an application process with the U.S. Department of Energy describing how we intend to use the HOMES funds before we can receive them. Our intent is to allocate 60% of the HOMES funds to the EBD Direct Install Program, and the remaining funds to a separate pay-for-performance program. Shown here are the HOMES funds that we plan to make available to each regional administrator, subject to DOE's approval of our application. Note that for the Federal HOMES funds, regional administrators may spend up to 8% of total funds on administrative costs, and up to an additional 8% on project-related costs.

Slide 15: Minutes 14:42-15:46

Diana Maneta: So, to get into those definitions, the GFO defines 3 categories of costs: Project costs, project-related costs, and administrative costs.

Project costs are the costs of home assessments and building retrofits, including equipment, labor, and permitting. Project-related costs are other costs that are tied to a particular project, in other words, a particular retrofitted home. They include costs related to outreach and engagement, income verification, execution of Program Participation Agreements with property owners and tenants, quality control, and follow-up surveys of participants. Administrative costs are all other costs. This includes project tracking, data management, and reporting; and all the start-up and ongoing tasks that administrators will be responsible for, and which aren't included in one of the other categories. All the administrator tasks are described in the Scope of Work. I want to emphasize that outreach and engagement is defined as a project-related cost. This is a change from the draft solicitation, in which it was defined as an administrative cost.

Slide 16: Minutes 15:48-17:34

Diana Maneta: The solicitation is open to all public and private entities. The primary applicant may not submit more than one application for a single region, but may submit applications for

more than one region. If applying to multiple regions, Applicants must demonstrate how their team would have the capability to effectively administer the program concurrently in multiple regions. Team members that are not the primary applicant may be involved in multiple applications per region.

Applicants must have qualifications relevant to residential building decarbonization, including the decarbonization of single-family homes, multifamily buildings, and manufactured housing applicants must also include a minimum of two Community Based Organizations (or CBOs) on their team for culturally appropriate outreach, education and support of participating households and communities. Proposals may be led by CBOs as primary applicants, include CBOs as subcontractors, or both.

For this program, a CBO may include a nonprofit organization, tribal entity, or governmental entity with demonstrated effectiveness representing an underresourced or tribal community and providing support and services to individuals in the community. Note that two CBOs is a minimum, meaning that applications will be rejected if they do not include at least two CBOs. However, including more than two CBOs is encouraged.

In addition to CBOs, team members may include local governments, utilities, Community Choice Aggregators, or other public or private entities. It's up to applicants to assemble teams that they believe will be best equipped to implement the program successfully in the region. Proposals will be scored based in part on the composition of the team and the proposed roles of the various team members.

Slide 17: Minutes 17:35-19:12

Diana Maneta: So, speaking of roles, proposed project teams may include these various roles. First, the Recipient is the lead applicant receiving the award under the solicitation and who we also refer to as the Regional Administrator. When completing the budget forms, please be aware that no profit is permitted for the Recipient.

Subcontractors are entities that receive funds from the Recipient and are entrusted by the Recipient to make decisions about how to conduct some aspects of the program. Subcontractor's roles involve discretion over grant activities, not merely selling goods or services. Profits up to 10% are allowed for subcontractors.

Vendors are entities that sell goods or services to the Recipient or a subcontractor but do not exercise discretion over grant activities. While profit restrictions do not apply to vendors, the Recipient is required to develop and implement cost-control mechanisms to ensure that costs paid to vendors are reasonable.

Finally, though the word "Partner" is sometimes used informally to describe any entity involved in a regional administrator team, the formal definition of this term, as used on the Project Team Form, is an entity that supports the program but is not requesting CEC funds. For example, this could be an entity that administers another building decarbonization program that is not seeking EBD funds but intends to coordinate with the regional administrator to layer their own funding with the EBD program in a particular community or region. It could also be

an entity that intends to partner with the regional administrator to advance public interest research.

Slide 18: Minutes 19:14-20:18

Diana Maneta: So, all project and project-related funds must be allocated according to the following requirements. First, all households served by the program must be low-income and located in underresourced communities.

Second, at least 65% of State funds and at least 74% of federal HOMES funds must be allocated to households in disadvantaged communities as defined by CalEPA. As a reminder, disadvantaged communities are included in the definition of underresourced communities along with low-income census tracts.

Next, at least 5% of funds must be allocated to households outside but within one half-mile of a disadvantaged community. At least 5% of funds must be allocated to manufactured or mobile homes, and at least 19% of federal HOMES funds must be allocated to multifamily buildings. State funds may also be used for multifamily buildings, but there's not a required minimum allocation. The program must also serve single-family homes, though there isn't a minimum funding allocation for these homes.

Slide 19: Minutes 20:21-22:13

Diana Maneta: Pending DOE approval of CEC's application, regional administrators will be responsible for ensuring HOMES funded program activities and projects comply with HOMES Program Guidance. CEC plans to utilize the Model Savings Approach, as defined in the HOMES Program Requirements and Application instructions. For projects supported by HOMES funds: Regional Administrators must use DOE-approved modeling software to estimate energy savings prior to conducting retrofits; modeled energy savings must equal or exceed 20% for a project to be eligible for HOMES funding. The CEC or a third party through a separate contract will measure actual energy savings for participating homes over a 12-month post installation period. Those actual savings will be tracked per region and per contractor and compared to modeled savings. Results will be made publicly available to inform improvements to the EBD program and to advance the state's understanding of the accuracy of modeled energy savings and residential buildings.

For those who reviewed the draft solicitation that was released in March you may recall the draft included a "performance retention" equal to 5% of project costs, which would have been released following the 12-month measurement period, contingent upon projects achieving a certain level of measured energy savings. Please note that the final solicitation does not include a performance retention. However, the CEC will still withhold its standard 10% retention on each invoice as described in the Terms and Conditions. The final solicitation clarifies that this standard retention will only apply to administrative costs, and may be released on an annual basis subject to satisfactory performance by the regional administrator.

With that I will turn it over to my colleague Adam Lokar, for the next section of the presentation.

Slide 20: Minutes 22:16-22:40

Adam Lokar: Great! Well, thanks Diana, and hi everyone. My name's Adam Lokar, and I'll walk us through the Application Organization section. This includes the requirements related to the application formatting and its organization. These instructions are also included in the solicitation manual. So please follow all instructions carefully to ensure that your application is complete and can be considered by the CEC.

Slide 21: Minutes 22:43-23:13

Adam Lokar: So here are the rules for formatting applications to meet state standards and ensure a consistent review. Please leave electronic files in Microsoft Word or Microsoft excel formats except for Attachments requiring signatures and Commitment and support letters which may be submitted in a PDF format. And please keep the project narrative to 40 pages or less. Resumes and letters of commitment may not exceed 2 pages each.

Slide 22: Minutes 23:16-23:44

Adam Lokar: Applicants- Applications must include all the components that are listed here. Items that have an "N/A" or "Not Applicable" reflected in the "Attachment Number" column are required to be submitted as part of the application package, but do not have an associated attachment provided in the Solicitation package. I will describe each required application component briefly on the following slides, but for complete instructions, please refer to the solicitation documents.

Slide 23: Minutes 23:47-24:08

Adam Lokar: So first, on the application form, the applicant must provide basic information about themselves and proposed subcontractors, and agreed to all the required authorizations and certifications. This includes authorizing the CEC to make any inquiries necessary to verify the information presented in the application.

Slide 24: Minutes 24:11-25:09

Adam Lokar: The Program Narrative is really the heart of the application. This is where the applicant will provide a detailed description of how they propose to implement the program and achieve the goals and objectives.

The application manual includes a detailed description of the required components of the Program Narrative, and these include the team's relevant experience and qualifications; the

proposed roles of all team members and the team's approach to internal controls; the applicant's approach to implementing the program, including proposed Initial Community Focus Areas and how the team would approach each of the implementation tasks described in the Scope of Work; a justification of the proposed budget provided in Attachment 4, and a description of the proposed schedule, including the expected date of program launch and the projected number of homes that will be retrofitted in the first 6 to 12 months and then per year thereafter.

Slide 25: Minutes 25:12-26:03

Adam Lokar: Attachment 2 is the Scope of Work which includes all the tasks shown here. These tasks have been provided by the CEC, and should not be changed by the applicants. However, applicants may add additional tasks proposed tasks at the end of the Scope of Work. As I mentioned on the previous slide, the Program Narrative is where the applicants will explain their approach to completing the implementation tasks described in the Scope of Work. For those of you who reviewed the draft solicitation that was released in March, you will notice a few changes to the Scope of Work relative to the draft version. While changes were made to many of the tasks based on public comment, some of the more significant changes were made in Task 3 and Task 5.6. So please review the Scope of Work in detail as you are drafting your applications.

Slide 26: Minutes 26:05-26-23

Adam Lokar: On the Schedule of Products and Due Dates, this is an Excel file. Applicants must propose completion dates for each product listed in the Scope of Work. Note that for some of the reoccurring tasks, a frequency is acceptable instead of a specific date.

Slide 27: Minutes 26:26-27:28

Adam Lokar: The Budget Forms are another Excel file with multiple sheets. The full set of Budget Forms must be completed for the primary applicant and for each subcontractor that is proposed to receive over \$100,000. Each sheet of the Budget Forms includes instructions at the bottom. So please review all instructions to be sure you complete the forms correctly. The salaries, rates, and other costs entered on the worksheets will become part of the final agreement and the proposed budget form must reflect estimates for actual costs to be incurred during the agreement.

So, the proposed rates are considered capped and may not change during the agreement term. Take note to disaggregate costs by state and federal funding sources and to select the appropriate task or cost category for each line item. And when completing the budget forms, be sure not to exceed the funding caps for administrative and project-related costs and be mindful of the profit limitations for Recipient and subcontractors.

Slide 28: Minutes 27:32-27:55

Adam Lokar: On the Project Team Form, the Applicant must list their key personnel, subcontractors, and partners. Resumes must be provided for each individual listed, and must not exceed 2 pages per resume. On the contact list the Applicant must provide contact information for their proposed Project Manager and other specified individuals.

Slide 29: Minutes 27:57-28:43

Adam Lokar: Applicants are required to include letters of commitment from proposed subcontractors that demonstrate their commitment to the program, their role, and ability to fulfill their role.

Applicants are not required, but are encouraged to submit letters of support from other key partners or entities who will not be members of the team receiving CEC funds. Such partners may include state or federal agencies, tribes, local governments, non-governmental organizations, air districts, utilities, community choice aggregators or any other relevant organization. Letters must include sufficient contact information so the CEC is able to contact the letter writer, and letters are limited to 2 pages each.

Slide 30: Minutes 28:46-29:28

Adam Lokar: On the Past Performance Reference Form, applicants must provide information about all CEC contracts, grants, or loans they have received in the past 10 years, as well as their 5 most recent agreements with other public agencies, tribes, or loads serving entities in California in the past 10 years. If a team member's experience described in the Program Narrative includes a project funded by public or ratepayer funding, the applicant must also submit a Past Performance Reference Form for that team member and project, even if the team member is not the primary applicant. And applicants may submit as many Past Performance Reference Forms as needed.

Slide 31: Minutes 29:32-29:55

Adam Lokar: Great! And finally, the on the CEQA Compliance Form, applicants will answer a series of questions related to the California Environmental Quality Act. The CEC will use the information provided on this form to facilitate its evaluation of proposed activities under CEQA. And this form must be completed, regardless of whether or not the proposed activities are considered a "project" under CEQA.

Slide 32: Minutes 29:57-30:06

Adam Lokar: Great! So next I will describe the evaluation process and the criteria that the CEC will use to score applications.

Slide 33: Minutes 30:08-30:51

Adam Lokar: So first, all applications will be screened according to an administrative and technical screening criteria which I'll show on the next slide. Applications that pass this initial screen will be sent to the Evaluation Committee, who will score the applications according to the Evaluation Criteria, which I will also share shortly. Once the evaluation process is complete, the CEC will release a Notice of Proposed Awards, or NOPA, that will include the results of the evaluation and the recommended rank order of applicants by region. We currently expect to release the NOPA in August. Finally, applications recommended for funding will be developed into a proposed grant agreement to be considered at a CEC Business Meeting.

Slide 34: Minutes 30:53-31:42

Adam Lokar: So, this slide shows the administrative and the technical screening criteria. Applications must pass all screening criteria in order to be further evaluated and scored.

So, the Administrative Screening Criteria include whether the application: was received by the due date; includes all the required authorizations and certifications; does not include a statement contrary to required authorizations and certifications, and the applicant has not identified any sections or attachments as confidential.

The technical screening criteria checks whether the application: includes at least 2 CBOs on the project team, and if an applicant has previously received a contract, grant, or loan from the CEC. Whether there were any severe performance issues associated with that agreement.

Slide 35: Minutes 31:45-32:15

Adam Lokar: So, in addition to the screening criteria, the CEC reserves the right to reject any application at any time during the application or agreement process if the following circumstances are discovered: If the application contains false or intentionally misleading statements; the application is intended to mislead the state; or the application does not comply with or contains caveats that conflict with the Solicitation, or is otherwise non-responsive to the Solicitation.

Slide 36: Minutes 32:18-33:00

Adam Lokar: This slide shows the topics under which applications will be evaluated. The full Evaluation Criteria table in the Solicitation Manual includes much more detail within each of these categories. The middle column shows the possible points available in each category, and the right-hand column shows the minimum passing score in each category, which is 70% of the possible points. Please note there is a correction shown here on the slide in red, so the total minimum passing score is 101.5 points, not 105 as it is listed in the Solicitation Manual. An addendum will be issued in the coming days to correct this error.

Slide 37: Minutes 33:02-33:38

Adam Lokar: To highlight a few other administrative notes, applicants are responsible for the cost of developing their application. The CEC will not reimburse these costs. While our intent is to award funding, through this solicitation, the CEC Reserves the right to cancel the solicitation, revise the amount of funds, amend the solicitation, or reject any and all applications. If you notice any errors in the solicitation, please notify us as soon as possible in writing.

Great! And with that, I'm going to hand things off to my colleague, Prince Addison.

Slide 38: Minutes 33:40-33:48

Prince Addison: Thank you, Adam. Hello! My name is Prince Addison, and next we'll talk about the actual process of submitting an application.

Slide 39: Minutes 33:49-34:42

Prince Addison: So, all applications must be submitted through the CEC's Grants Solicitation System, or GSS. The URL for the system is www.gss.energy.ca.gov. Instructions for using this system are available at the link at the bottom of the screen. We encourage you to review the instructions carefully to avoid common errors.

Applications are due by 11:59 pm on June 28, but the CEC strongly encourages applicants to submit applications before 5:00 pm in case issues are encountered because CEC staff are only available to provide assistance during regular business hours. First-time users will need to register to access the GSS system. Upload times may be longer than expected. For these reasons, we encourage applicants to start the process early to avoid the risk of missing the deadline. We are not able to make any exceptions to the application deadline.

Slide 40: Minutes 34:45-35:08

Prince Addison: We believe that strong partnerships are essential to the success of this program, which is why the solicitation requires applicants to come in as a team. We encourage you to use the optional sign-in sheet as the way to find potential partners. As a reminder responses to the sign-in sheet will be posted to the docket after the workshop. We also encourage you to use the Empower Innovation website to make connections and form partnerships.

Slide 41: Minutes 35:10-36:00

Prince Addison: Empower Innovation is an initiative funded by the CEC. It's a platform where people and organizations can find funding opportunities and connect to potential partners who are interested in the same opportunities.

This is a screenshot of the EBD page on the Empower Innovation platform. You can find this page at the URL at the bottom of the screen, and we'll also put the link in the chat. To use the platform, you'll first need to register for an account using the "Sign Up" button at the top of the page. Once you're logged in, navigate to the EBD page shown here and click on "Find a Partner" to connect with other organizations about this funding opportunity. If you need further assistance with navigating the site, use the link- the video link at the bottom of the screen for a demo on how to use the platform.

I'll now turn it over to Susan for the Q&A period.

Slide 42: Minutes 36:04-36-14

Susan Mills: Thank you Prince, appreciate that. Okay, we have- excuse me- we have a quite a few questions, great questions in the chat.

Slide 43: Minutes 36:17-1:10:26

Susan Mills: Just as a reminder there's 3 ways we can go about this Q&A period if you'd like to speak verbally. Please use the "Raise Hand" feature in Zoom, which looks like an open palm. We'll announce your name and unmute you, and then you can ask your question. If you're joining by the phone, press *9 to "raise your hand" and *6 to mute/unmute. Second, you can use Zoom Q&A, which many of you are already doing. And lastly, again, after this workshop, you may submit written questions by emailing them to Marissa Sutton, our Commission Agreement Officer. And as a reminder, please put GFO-23-404 in the subject lines help speed things of the process along and make it efficient. We'd really appreciate that.

All questions that are received by May 15, including questions asked in the workshop today will be answered in a written Q&A document that will be posted to the EBD web solicitation web page by May 30. We will also answer these questions as we're able to today. And if we don't have an immediate answer to your question, again we will provide it in the Q&A document.

Okay, with that, does anyone have a raised hand? Would you like- anyone have a verbal question like to ask? Not... oh- thank you, Hally.

Hally Cahssai: Aaron.

Aaron Grail: Good afternoon. Thank you guys very much. I wanted to ask if this was all directed towards retrofit of existing residential buildings, or if new construction in the qualifying areas would be considered as well, multifamily and stuff like that.

Diana Maneta: Thanks for that question. This is just retrofits of existing buildings.

Aaron Grail: Very good, thank you.

Susan Mills: Thank you.

Hally Cahssai: Grace Hut, please unmute at your end.

Susan Mills: Grace? Is that where Grace Hut- are you able to unmute yourself?

Hally Cahssai: She's unmuted, but we can't hear her.

Susan Mills: Okay.

Hally Cahssai: I'll go to the next person. Meredith. Please unmute yourself.

Meredith Nole: Hi there! I just came in late. I don't know what I missed when I came in late, but I just wanted to be sure that I would have a copy of the PowerPoint, so I could share with my team. And I'm guessing that all the other information of the dates, etc., are gonna be included on your PowerPoint that I missed. Thank you very much. This is really wonderful actually, and great program, and very needed, frankly. That's it for me. Thank you.

Susan Mills: Thanks, Meredith. Yes, we will post the slide deck in the recording to the web page. We'll announce that when it's done, and appreciate you being here.

Meredith Nole: Thank you.

Diana Maneta: The dates, Meredith. I just wanted to note, all the dates are also in the grant funding opportunity itself. And that that link you should be able to see that link in the chat. We can put it in the chat again, to our GFO page, but you can find those dates in the solicitation documents as well.

Susan Mills: On page 11 of the Manual.

Meredith Nole: Excellent. Thank you.

Hally Cahssai: We'll try Grace again. Grace, we can't hear you if she's speaking.

Kenny Sanders: If we can't hear, have her submit her question in writing.

Hally Cahssai: Right. All right. We'll go to Tim Frank.

Tim Frank: Hi! Can you hear me?

Susan Mills: Yes, we can. Thanks, Tim.

Tim Frank: Thanks. So I'm Tim Frank, and I'm with the Construction Trades Workforce Initiative and we're working with a partner, Rebuilding Together, on, currently, doing a direct install pilot that we hope actually could help make us a good partner for folks who are interested in incorporating some existing lessons. And also, carrying out the function of the continuous improvement through doing something like a pilot. In a pilot as you're going along, you're testing and then improving the product that you're pushing out there as you go. And

we're looking for partners in doing this work. And I have one question for you. Which is when you're looking at the multifamily sector, is there any limitation on the size of the buildings that we're allowed to actually address?

Diana Maneta: No limitation on the building size.

Tim Frank: Perfect thanks.

Susan Mills: Alright, Tim is that it?

Tim Frank: Yeah. Well, I mean, the one other question I had is, our work is oriented around trying to prove a direct install model that specifically is trying to create high road jobs, and I did notice that there's clearly credit for workforce development. So I assume this is something that you'll be scoring, and that you'll be interested in. And we're very excited about that.

Diana Maneta: Yeah, thank you, Tim, I would point everybody to. There are workforce standards and requirements as part of this program. You can see those in the program guidelines and then in the scope of work. We clarify that the regional administrators will be required to develop and implement a workforce plan to achieve those workforce standards and requirements. So I would point folks' attention to those to that section of the solicitation and the approach to developing the workforce plan does enter into the scoring criteria.

Tim Frank: Thanks.

Susan Mills: And that scoring criteria table is towards the end of the solicitation manual, in the at the end of the application evaluation and award process. So section D there, evaluation criteria.

Alright Hally! Do we have any others? I'll raise hands.

Hally Cahssai: Yes, Caroline Del Core.

Caroline Del Core: Hi! This is Caroline Del Core. I have a quick question. Would the list of attendee of this workshop be available anywhere?

Susan Mills: We have an optional sign in sheet available that you can use. People are welcome to use it. We encourage people to sign in that want to share their information for partnerships. We will post that sign in sheet on our website. We'll notify you when it goes out. It just got reposted in the link. So please use that sign in sheet, and that will be published.

Caroline Del Core: Thank you.

Hally Cahssai: Next we have Jessica.

Jessica Frenkel: Hi, there. My question is, can program recipients stack EBD incentives with other incentive programs, for example, TECH Clean California? And if so, how can a recipient pursue that incentive layering?

Susan Mills: I had a hard time understanding like. The sound wasn't great on my end. Diana, did you catch it, or?

Diana Maneta: Yeah, I think, Jessica, the question was about whether it's possible to layer incentives or combine incentives from the EBD Direct Install Program with other programs like Tech Clean California, I believe Jessica mentioned. And the answer to that is, yes, there is in the scope of work, which is Attachment 2 that we posted, leveraging and layering with other programs is actually task 7 of the scope of work. So, we are asking applicants to describe their proposed approach to doing that. So certainly allowed and encouraged as well. And, Jessica, yeah, your, your audio was a little bit shaky, so if I didn't answer your question, please speak up again.

Jessica Frenkel: That answers it. Thank you, Diana.

Hally Cahssai: Sam Teal next.

Sam Teal: Hi, thank you. Two questions, clarification questions, on the budget. The first was, there's a 5% set aside of the budget for manufactured in mobile homes. Is that a total of the entire EBD program budget? Or is that a portion of the funds for conducting the retrofits?

Diana Maneta: That is for the project and project-related costs, so doesn't include the admin.

Sam Teal: Okay. And that's 5% of those tranches together, it's a project and project-related cost 5% of that is to be set aside for manufacturing mobile homes.

Diana Maneta: At a minimum. Yes.

Sam Teal: Okay. And then the 10% retention that applies only to the administration portion is that 10% of the administrative tranche, or is that 10% of the total CEC award?

Susan Mills: It's the admin, the administrative tranche.

Sam Teal: Okay, thank you.

Hally Cahssai: Next, we have Jessica. Again, lowered their hand.

Susan Mills: Okay.

Hally Cahssai: Tim Frank.

Tim Frank: Thank you. So, one of the things that CTWI does a lot of work with on a variety of different public projects is to help make sure that there's success with targeted hire programs. And I noticed that you're very interested in bringing benefits to particular communities and targeted hire is one of the tools that you can actually use to do that. And I'm just wondering if that's something that you're potentially gonna be scoring as well?

Diana Maneta: We- like I said earlier, Tim...yeah, great question. We will be scoring applications based on part on their approach to the Workforce Plan and to meeting those

workforce standards and requirements. And so that- that's pretty much the extent to which I can answer that question at this point. But encourage you to take a look. I think you already have to encourage you to take a look at what we have on that in the guidelines and the solicitation.

Hally Cahssai: Caroline Del Core- I don't know if you have more questions, or if your hand is still raised- okay, she lowered her hand. Aaron Gale-

Diana Maneta: Sorry to interrupt Hally. I was just gonna finish my response to Tim. Pointing your attention specifically to targeted hiring strategies are on the list of Contractor Preference Criteria in our program guidelines.

Aaron Grail: I just had a question for finding...folks in the in the CEC that can help guide people like me. I'm a building contractor that wants to deploy carbon capture materials and decarbonization material in my business around the state, and it's a daunting network. It's a big org., and do you guys have advocates, or is there a place I can go to get additional help and guidance?

Susan Mills: I suggest, if you would put your question in writing and submit it to Marissa, I think that would be helpful, and then we can see where we can point you.

Aaron Grail: That's great! In the- to the email or in the chat?

Susan Mills: In the email would be- either way. But if you wanna email Marissa, that's fine or in the chat, we'll respond either way.

Aaron Grail: I'll send an email in to Marissa. Thank you very much.

Susan Mills: You're welcome, Aaron. We have a lot of questions in the chat.

Hally Cahssai: As I get.

Susan Mills: Well.

Hally Cahssai: Questions from the Q&A.

Susan Mills: Yeah, do we still have some hands raised? Okay. Yeah, we could take some in here...I'll just-

Diana Maneta: Folks, if you put a question in the Q&A, and we don't answer it verbally right now, it will be answered. That means we need a little more time to look into it. We will answer it in our written Q&A document that, as Susan mentioned, that will be posted. So don't worry if your question isn't answered verbally, but we will answer the ones that we can right now.

Susan Mills: Yes, thank you, Diana, for clarifying that. We do have in a question regarding past performance requirement of 5 most recent agreements. They're asking is that collectively across the team or 5 most recent agreements for each team member. That is clarified in the manual. Do we have a page number we could give are on the form? Let me...

Diana Maneta: It's on page 31 of the Manual- Sorry to interrupt you, Susan. And if that doesn't, we'll take a look, and if the language there doesn't fully address that question, we will answer that in the written Q&A.

Susan Mills: Okay.

Diana Maneta: I see- I know Grace Hut was trying to speak earlier, and we weren't able to hear her. She did ask a question related to tenant protections. Grace, we don't have an immediate answer to that, but we will answer those in the written Q&A document as well.

Susan Mills: And I think, Susie Wong, you had a question: Does the product supply to new prefabricated homes? Diane already mentioned this is for existing buildings. So no, it doesn't apply to new homes, prefabricated. And Diana feel free if you see me in there that...

Diana Maneta: Yeah, I see Sam had a question about whether letters of commitment are required from proposed installation contractors, noting that many will be identified as part of the workforce development effort. Yes, we understand that there may be subcontractors or vendors, other team or team members who are not identified at the time of the application. And they can be...that's okay, that some will- we know that some will be identified once the contracts are in place.

Susan Mills: Just- there's some questions in here about budget vendors and things of that nature. We do have instructions within the Budget Form spreadsheet so definitely, please take a look at those instructions and the detail provided there. But we will get to these in writing, if not able to at the moment.

Diana Maneta: There's a question about modeled energy savings, and whether a project or like a home retrofit would not be eligible to receive federal HOMES funds if it is not anticipated to save 20%, and that is correct. For federal HOMES funds, modeled energy savings must equal or exceed 20% for those federal funds to be applied. And that is mentioned in the Solicitation Manual on page- Where are we? Page 18...18 to 19.

Susan Mills: Thank you, Diana. There's a question in here. The presentation about budget rates that cannot change through the life of the agreement. This is anticipated to be a 5-year contract. So, if there's no flexibility to modify, it is then suggested proposed rates are augmented to account for this in our Budget Forms. We do have that in the instructions so, you know, these are rates over the life of the 5 years. So, when you're coming up with your Budget Forms, just keep that in mind as your team is evolving over those 5 years.

Diana Maneta: Great! We've got a question from Nathan: For the mobile homes portion. Is there a budget to allow for non-energy saving improvements like holes in the roof or floor? Remediation measures safety and remediation improvements are eligible. In the EBD program, both for manufactured homes as well as other single family multifamily residences, there are average cost caps for those remediation and safety improvements, as well as wiring- electrical wiring upgrades, and those are in the program guidelines. Those average cost caps are \$6,000 for single family and multifamily buildings per unit, and \$7,200 for manufactured and mobile

homes. That's not a cap for each retrofit project, it's an average across all the homes served. And again, that's not for all measures, it's just specifically for electrical and remediation costs.

Susan Mills: Sam, you're asking about if there are...if there are no additional tasks proposed in the Scope of Work by the applicant, what's required for a compliance submittal of the Scope of Work, if I'm understanding that question correctly. It would just be, you know, clearing out those blue lines of insert here and cleaning it up, if there were no additional edits to the Scope of Work and then uploading that. And again, I just want to stress the...to submit in a, earlier than you know, 11:50 pm on the 28th. Just get it in earlier during business hours. Would be great. If you have any issues, there can't be file upload...can take time, maybe longer than expected, and you know, be concise with your naming of your files. So that's been an issue just long naming and of files can slow down the process. So just be concise and get it in earlier than later. Diana, did you want to add anything, or do you see any other questions?

Diana Maneta: Just on this the Scope of Work question. I know that we mentioned this earlier, but just to be very clear also in the Program Narrative, the applicants will be required to describe their approach to many of the tasks that are listed in the Scope of Work. So just wanna make sure that that is clear as well.

Susan Mills: We could go back to the raised hands. I see a couple in there.

Hally Cahssai: Tim, do you still have more questions?

Tim Frank: Sorry, that was accidental.

Hally Cahssai: Okay. Meredith...Meredith, do you have any more questions?

Meredith Nole: Yeah. Hi, so my question is about the ownership of the buildings, because we're working with low-income. Now, low income are, and in many ways are renters who live in homes owned by folks that are not low-income. And how does that- how do you look at that scenario? Relative to the ownership or the ownership's wealthier? We're doing the house, anyway, for the low-income tenants who may move out, etc., etc.?

Diana Maneta: Yeah, thanks for that question, Meredith. The income requirements apply to the building occupant, not the building owner. But it's really important to note, there are tenant protections that are required as part of this program. The program guidelines are the best place to take a look at those, and they also are addressed in the Scope of Work, Attachment 2, related-

Meredith Nole: Great!

Diana Maneta: to Program Participation Agreements and tenant protection. So, the intent certainly is to benefit the low-income occupant of those buildings. And- but yes, the income requirements apply to the occupant, not to the owner.

Meredith Nole: I have a follow up on that. Now, what if the actual person living in the house is currently low income.? Because that person happens to be a senior, not working and on social security. However, the house is an expensive house like a million-dollar home, but their

income is reduced, so they're low-income. Now, do you have any thoughts, or is there any issues on that or regs on that scenario?

Diana Maneta: The program does not include eligibility requirements related to the cost of the home. It is related to the income as well as there's eligibility requirements related to location, Meredith, as we mentioned, being located in an underresourced community and being in one of the initial community focus areas for-

Meredith Nole: Got it.

Diana Maneta: the program.

Meredith Nole: Thanks.

Hally Cahssai: We have Karen Herter. Karen, if you can unmute-

Karen Herter: I'm just. I'm just unmuting myself here. Sorry, I was reading the solicitation, and I see that it talks about efficiency and decarbonization. And I'm interested in installing or working with someone to install thermostats that, they won't necessarily make the HVAC system more efficient, but they do have the potential to save the customers money by shifting their usage out of the peak periods. And also out of the high GHG emissions periods which, so it'll lower their bills and lower their greenhouse gas emissions, which is, of course, you know, ultimately a requirement for decarbonization. Is that something that would be considered, even though there's not an efficiency component to it?

Diana Maneta: Yes, Karen, good question. Smart Thermostats are eligible for the program. The best place to look in the Program Guidelines, there's a full list of eligible measures. And as we mentioned earlier, there are a few measures that are required for all homes that are retrofitted through this program, and that is either a heat pump or a heat pump water heater is required. As well as at least 2 of the 4 primary end uses being electric at the end of the retrofit, but there are also a number of other eligible measures that aren't required to be installed in each home, and that includes load shifting type measures, including smart thermostats. But that list in the guidelines, eligible measures list, Table 4, starting on page 14 of the guidelines, is the best place to see that full list.

Karen Herter: Great. Thank you so much. I'll take a look at that. Great.

Susan Mills: Alright, thank you, and that's all for the raised hands at the moment. There's a question in here from Nathan about for the mobile home portion, is there a budget to allow for non-energy saving improvements like holes in the roof or floor?

Diana Maneta: I answered that one already.

Susan Mills: Oh. Thank you. Okay, thank you. I'm gonna.

Diana Maneta: Sorry.

Susan Mills: Take that one off to the side. Sorry. Some of these might have been answered already.

Diana Maneta: Related to the question we just heard from Karen, I see a question from Mark. Is there a deadline for getting products such as smart thermostats qualified for inclusion? Smart thermostats are already eligible. For this program. So just to clarify that.

Susan Mills: Great. Thank you.

Diana Maneta: Looks like we have a raised hand from Steven Kullmann.

Stephen Kullmann: Hi! Can you hear me?

Diana Maneta: We can.

Susan Mills: Yes, we can thank you.

Stephen Kullmann: Okay. Great. Yeah. I wasn't sure if the question that I asked in the Q&A was seen, or if it was one of those that you might get to later. But I was wondering if there was an accepted definition of community-based organizations, and specifically, I'm with a CCA here in Northern California that serves a hard-to-reach community. Would a CCA be considered a community-based organization in the context of the requirements for this solicitation?

Diana Maneta: We do have a definition of community-based organization in the GFO, and I'm just pulling it up here. So I'm gonna, the definition is that CBOs include nonprofit organizations, may include nonprofit organizations, tribal entities or governmental entities with demonstrated effectiveness representing underresourced or tribal communities and providing support and services to individuals in the community. So that's a case-by-case basis and I think applicants would be required to make the case for the entities that they propose to include as CBOs as part of their application.

Stephen Kullmann: Great. Thank you. Because, yeah, we're a Joint Powers Agency as well as the CCA. So it seems like that would go qualify as a government organization, but can look into that more. Thank you.

Susan Mills: Thank you, Stephen. There's still quite a few questions. Some of these we'll have to take back and provide written responses. So anything that you don't receive, I see someone asking about unanswered questions, yes, we will answer these. If we don't get a verbal answer today, that will come in a written question and answer document that we will post to our docket. By the, by May 30th. I'm not sure if this one was already, answered. Diana, what is the cap for outreach and engagement?

Diana Maneta: It has not been.

Susan Mills: No. Okay.

Diana Maneta: Yeah, outreach and engagement is included in the project-related cost category. So for the Federal funds, there's a 8% cap on that category. And for the state funding there's no explicit cap on the project-related funds. There is a cap on administrative funds.

Susan Mills: There's a follow up here about what happens if the budget is insufficient for that? I just want to remind people that this is a, this isn't a program that's open for all. It's, you know, coming in with those initial community focus areas, and kind of homing in to communities. So just keeping that in mind as you're coming up with your proposals and your budgets, and how you would be able to implement, you know, given those parameters.

Diana Maneta: There are, I think, Susan, you mentioned this earlier. There are a number of, kind of, specific questions about the budget attachment, Attachment 4, in the that have come in and writing and we will include those in the written Q&A document. We're not able to answer those detailed questions live right now, but those will be answered in writing. As well as any other questions that we may not have answered that came in in writing.

Susan Mills: Alright, just scrolling through to see if there's any additional questions we may be able to answer now.

Diana Maneta: Got a follow up on the project-related, outreach and engagement being under project-related costs. The question is clarifying if that's a change, a change from the draft solicitation when it was under administrative costs. Yes, that's correct.

Susan Mills: Thank you, Diana. We will work to answer these questions as soon as possible in writing, and if we're able to get those out before May 30th, we definitely will. And that will, we will work to, as quickly as we possibly can, to find these answers and to get them all in writing for you.

Diana Maneta: Last call for raised hands. If anybody wants to ask a question out loud.

Susan Mills: Alrighty.

Slide 44: Minutes 1:10:29-1:11:48

Susan Mills: We'll keep moving then. Really appreciate the dialogue, the conversation, the questions, and your engagement here. So on the screen now we have our key activities and dates. So we are here, May 10th, at our pre-application workshop. If you have additional questions besides, what has been put in the chat or in the question and answer here, we're also noting that verbal comments, those questions, those will be included. We will compile it all together and issue out a written answers by May 30th. Again, the last day to submit your applications is on June 28th, that's a Friday and by 11:59. Again, get it in sooner than that. Don't want to wait till the last minute because the system will kind of shut off at that time, and you won't be able to, it won't accept it after that: 11:59

We anticipate the notice of proposed awards being posted on August 2nd, and then going to a business meeting by December 11th. Next slide.

Slide 45: Minutes 1:11:48-1:12:00

Susan Mills: And with that we're adjourned. Thank you all so much for your time and questions, and we will get those answers out to you as soon as possible. Enjoy the rest of your day.