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STAFF PAPER

Draft HEEHRA Phase I Community Benefits Plan

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ABSTRACT

The Inflation Reduction Act of 2022 authorized the Department of Energy to fund two Home Energy Rebate Programs to improve U.S. households and home upgrades: Home Electrification and Appliance Rebates Program and the Home Efficiency Rebates Program. As, California's State Energy Office, the California Energy Commission is the managing recipient for both programs. To support the Department of Energy's program goals, the Home Electrification and Appliance Rebates program is expected to (1) support meaningful community and labor engagement; (2) engage and support a skilled and qualified workforce; (3) advance Diversity, Equity, Inclusion, and Accessibility; and (4) contribute to the Justice40 Initiative with the goal that 40 percent of the overall benefits of certain federal investments flow to disadvantaged communities. California is to submit to the Department of Energy a Community Benefits Plan describing how the home electrification rebates program will incorporate the four objectives stated above.

California has split the Home Electrification and Appliance Rebates Program into two phases. Phase I will disburse \$80 million in residential electrification rebates. This draft Community Benefits Plan report relates only to Phase I. Phase II will have a separate application, program, and Community Benefits Plan, which have yet to be defined.

Keywords: California home rebates, Community Benefits Plan, heat pumps, HEEHRA, decarbonization, electrification, Inflation Reduction Act Residential Energy Rebate Programs, IRA Sections 50122, Home Electrification and Appliance Rebates, residential rebates, home rebates, statewide energy rebates.

California Energy Commission. 2024. *Draft IRA Sections 50122 Home Electrification and Appliance Rebates/HEEHRA Phase I: Community Benefits Plan*. California Energy Commission. Publication Number: CEC-XXX-201X-XXX.

TABLE OF CONTENTS

	Page
EXECUTIVE SUMMARY	1
Program Overview Information	1
SECTION 1: Community and Labor Engagement	4
I. California Contractor Workforce	5
II. Supply Chain Partners	7
III. Local Governments and Programs	8
IV. Multifamily Rental Property Owners and Managers	9
V. Low-Income Customers and Communities	10
VI. Rural and Tribal Customers and Communities	12
VII. Language Isolated Customers and Communities	12
SECTION 2: Engaging and Supporting a Skilled and Quality Workforce	14
SECTION 3: Diversity, Equity, Inclusion, and Accessibility	17
SECTION 4: Justice40 Initiative	20
I. Methods of Rebate Distribution to DACS	21
II. HEEHRA/TECH Clean California Program Design and Compliance Milestones	22
Contact Information	25
APPENDIX A: Summary Table: Community Benefits Outcomes and Objectives	A-1

LIST OF FIGURES

Figure 1: TECH Clean California Funded HVAC and Plumbing Education Facilities	16
Figure 2: Low-Income Ambassador Panel Member Locations	19
Figure 3: SB 535 Map of Disadvantaged Communities from CalEnviroScreen4.0	21

EXECUTIVE SUMMARY

Program Overview Information

The Inflation Reduction Act (IRA), Pub. L. 117-169 (August 16, 2022), authorized the U.S. Department of Energy (DOE) to carry out two Home Energy Rebate programs: Home Efficiency Rebates (HOMES) and the IRA Home Electrification and Appliance Rebates (HEEHRA). The Home Energy Rebates together authorize \$8.8 billion in funds for the benefit of U.S. households and home upgrades, to be distributed to households by State Energy Offices and Indian Tribes. These funds will be made available to the authorized recipients through formula grants. DOE is responsible for providing oversight and guidance, and the states are responsible for the administration of rebate programs at the state level.

The California Energy Commission (CEC) is the managing recipient of HEEHRA funds for the State of California. The CEC's approved application with the DOE for the full allocation of \$290,252,580 is based upon a two-phase program approach.

HEEHRA Phase I program funds will cover a statewide deployment of \$80 million in rebates. HEEHRA Phase I is focused on providing rebates to low-to-moderate income (LMI) and single- and multifamily households to help cover high-impact electrification projects. These residential projects include air source heat pump deployments for income-qualified single-family homes and acceleration of broader electrification for affordable and LMI multifamily homes. The HEEHRA Phase I implementation is seeking to exceed the initial \$1,161,000 low-income multifamily goal established by the DOE for California. In addition, HEEHRA Phase I will also be focused on a minimum \$4,725,312 rebate reimbursement goal that solely benefits low-income households. The HEEHRA Phase I program will be administered via CEC working with subcontractor Cohen Ventures d.b.a. Energy Solutions.

This Community Benefits Plan (CBP) relates only to HEEHRA Phase I. HEEHRA Phase II will have a separate application, program, and CBP, which have yet to be defined. HEEHRA Phase II implementation will address any additional requirements for the 50122 rebates.

To ensure states meet DOE HEEHRA program requirements, states must submit their responses to the DOE through two documents: 1) State Application, approved by DOE on June 11th, 2024, and 2) State Implementation Blueprint Plans submitted to the DOE a minimum of 60 days before program launch. One of the required Blueprint Plans is the Community Benefits Plan (CBP).

This CBP describes how the CEC intends to meet the following objectives in the planning and implementation of HEEHRA Phase I, which will be implemented through modifications to the existing TECH Clean California Program. Specifically, the CBP addresses how HEEHRA Phase I funding flowing through TECH Clean California commits to:

- Community and labor engagement
- Engaging and supporting a skilled and qualified workforce
- Incorporating diversity, equity, inclusion, and accessibility (DEIA)
- Addressing the Justice40 Initiative

The HEEHRA Phase I implementation via TECH Clean California, referred to as TECH Clean California funded by HEEHRA or HEEHRA Phase I funding TECH, is committed to serving low-to-moderate income Californians by expanding who benefits from residential or home carbon reduction, often referred to as decarbonization.

In addition, the HEEHRA Phase I program and its CBP are aligned with California's 2022 Climate Change Scoping Plan. In that Plan, the State of California committed to a statewide goal of creating three million climate-ready and climate-friendly homes by 2030 and seven million climate-ready and climate-friendly homes by 2035. In addition, the Climate Change Scoping Plan establishes the goal to install six million heat pumps by 2030 and directs 35 percent of climate investments to low-income and disadvantaged communities.¹

The new TECH Clean California funded by HEEHRA program is designed to meet Justice40 guidelines through program designs, which ensures that at least 40 percent of program rebate spending serves low-income and disadvantaged communities (DACs). Per Justice40 guidelines, the CEC defines DACs as areas throughout the state that disproportionately suffer from a combination of economic, health, and environmental burdens, such as poverty, high unemployment, air and water pollution, presence of hazardous waste, and high incidence of asthma and heart disease.

TECH Clean California funded by HEEHRA requires that 40.7 percent of California's HEEHRA rebate funds be distributed to low-income (\leq 80 percent area median income, or AMI by county) households and a 10 percent minimum allocation of funds distributed to low-income, multifamily projects. TECH Clean California funded by HEEHRA will leverage and enhance the initiative's existing community outreach framework, including a robust contractor workforce recruiting and training network, community-based organization partnerships, and coordination with statewide energy utilities.

HEEHRA Phase I funds will be distributed through TECH Clean California, which is a mature, statewide initiative with similar objectives. By leveraging TECH Clean California, the HEEHRA Phase I program takes advantage of a trained contractor base, proven marketing and outreach that has already achieved broad distribution, and the deep knowledge of working in tandem with California's existing income-qualified programs to reverse the lower uptake of home electrification efforts in low-income and disadvantaged communities.

The following CBP is intended to help California's HEEHRA Phase I program meet its goals by defining objectives, identifying the relevant stakeholders, and laying out specific, measurable, achievable, and relevant time-bound goals/objectives (i.e., Specific, Measurable, Achievable, Relevant/Realistic, Timely goals, also known as SMART Goals). The SMART goals described in each of the sections are summarized in a table in section F and will inform what gets measured and reported for accountability.

Public Input

The CEC plans to hold a virtual workshop with a public input session on the CBP in July 2024 to solicit feedback on this CBP for HEEHRA Phase I. A public comment period on this plan will be open through July 26, 2024. All public comments received via Docket 23-DECARB-01 --

¹ [2022 Scoping Plan for Achieving Carbon Neutrality](#), California Air Resources Board, 2022.

<https://www.energy.ca.gov/programs-and-topics/programs/inflation-reduction-act-residential-energy-rebate-programs> -- before the deadline, and feedback received during the virtual workshop, will be assessed, and incorporated as appropriate into this CBP. The final CBP will be posted and available on CEC's Docket 23-DECARB-01 website.

The following sections detail California's CBP scope for HEEHRA Phase I.

SECTION 1:

Community and Labor Engagement

The California Energy Commission (CEC) is committed to prioritizing equity and environmental justice in programs, policies, and operations as it strives for a 100 percent clean energy future². The CEC intends to expand and deepen its community and labor engagement efforts with the federally funded Inflation Reduction Act (IRA) Home Electrification and Appliance Rebates (HEEHRA) program. Communities the CEC aims to prioritize for HEEHRA Phase I implementation include: the California contractor workforce, workforce pipeline development and recruitment agencies, manufacturers and supply chain partners, low-to-moderate income homeowners, multifamily residential property owners and managers, Tribes, local governments and energy program administrators, Community Based Organizations (CBOs) and rural leaders, and language isolated consumers.

The HEEHRA Phase I program will be administered via CEC working with subcontractor Cohen Ventures d.b.a. Energy Solutions, who manages the TECH Clean California (TECH) program. CEC plans to leverage the HEEHRA Phase I funding to the TECH program and TECH’s existing outreach activities with manufacturers, distributors, and other industry stakeholders (i.e., energy services providers such as Home Energy Rating System raters and home energy assessors, energy utilities, and program administrators). These key industry stakeholders are important in expanding information and engagement to a larger group of residents. For example, TECH has partnered with *The Switch Is On*³, a statewide consumer awareness, inspiration, and education campaign, to leverage the collective efforts of the Building Decarbonization Coalition (BDC) and its partners to promote home decarbonization, rebates, and other incentives across the state.

Additionally, the CEC plans to leverage coordination and engagement efforts of the California Heat Pump Partnership (CAHPP), a public-private partnership launched in May 2024 that brings together state agencies, manufacturers representing more than 90 percent of the U.S. consumer heat pump market, energy utilities, and other market actors to help achieve California’s goal to install six million electric heat pumps by 2030. See Table 1 for a list of participants in CAHPP.

Table 1: Participants in the CAHPP

Partner	Sector
California Energy Commission (CEC)	Regulatory Partner
California Air Resources Board (CARB)	Regulatory Partner

² See pages 12 and 18-22 in Bailey, Stephanie, Jennifer Campagna, Mathew Cooper, Quentin Gee, Heidi Javanbakht, and Ben Wender. 2023. 2023 Integrated Energy Policy Report. California Energy Commission. Publication Number: CEC-100-2023-001-CMF. Available at <https://efiling.energy.ca.gov/GetDocument.aspx?tn=254463>

³ [The Switch is On](#)

Partner	Sector
California Public Utilities Commission (CPUC)	Regulatory Partner
Office of Governor Gavin Newsom	Regulatory Partner
A.O. Smith	Manufacturer - Heat Pump Water Heaters
Bradford White	Manufacturer - Heat Pump Water Heaters
Carrier	Manufacturer - Heat Pump HVAC
Daikin	Manufacturer - Heat Pump HVAC
Fujitsu General Marica	Manufacturer - Heat Pump HVAC
Lennox	Manufacturer - Heat Pump HVAC
LG	Manufacturer - Heat Pump Water Heaters
Mitsubishi Electric	Manufacturer - Heat Pump HVAC
Rheem	Manufacturer - Heat Pump Water Heaters
Trane Technologies	Manufacturer - Heat Pump HVAC
Johnson Controls	Smart buildings Company
Ferguson	Distributor - Plumbing & HVAC
Ava Community Energy	Public Power agency that provides electricity to Alameda County and Tracy
Southern California Edison (subsidiary of Edison International) (SCE)	California Investor-Owned Utility
Pacific Gas & Electric (PG&E)	California Investor-Owned Utility
Sacramento Municipal Utility District (SMUD)	Community-owned electric public community
Los Angeles Cleantech Incubator	Cleantech business incubator

Source: CEC Staff

CEC also plans to build upon the strong working relationships with CBOs in HEEHRA Phase I. California is the most populous U.S. state with over 39 million residents, is the third largest state by area, and encompasses sixteen different climate zones. California is large, complex, and its communities’ needs are diverse. CBOs can provide insight into the needs and nuances of the local communities they serve. To support heat pump market transformation, CEC plans to use HEEHRA Phase I to expand existing relationships with CBOs and provide training and educational resources they can share with their communities, both consumer and workforce focused.

I. California Contractor Workforce

The California contractor workforce refers to contractors licensed in the State of California who can perform heat pump installations and the pipeline of incoming new workers. The HEEHRA Phase I program will reach the California contractor workforce by providing rebates to income-qualified homeowners and eligible entities that are paid to contractors through a statewide centralized application process. In this process, residential contractors complete a secure application to request rebates and pass the rebate to the customer on their customer invoices. HEEHRA will also fund TECH’s continued training, direct resource sharing, and technical

assistance to California’s contractor workforce. In addition, this workforce will be certified and engaged to be the point-of-sale for HEEHRA Phase I rebates.

A. Type of Engagement

Contractor Incentive: HEEHRA Phase I will offer a \$200 contractor installation incentive to HVAC and plumbing contractors who complete installations for low-income (<80 percent Area Median Income or AMI), single-family customers that install eligible air source heat pumps throughout California. The installer incentive will be issued for each qualified low-income, single-family home when installations have been completed and verified.

Program Engagement: HEEHRA Phase I will continue to support installation contractors by assisting with enrollments and applications and disseminating information on new HEEHRA rebate opportunities. Specific activities include resource and collateral dissemination, meeting with contractors, gathering feedback from installation contractors via surveys and phone calls, engaging existing contractor base to encourage program re-enrollment across program cycles, and more. This program engagement will be offered on a continuous and on-going cycle through 2027.

Economic Equity Workforce Training: HEEHRA Phase I will fund TECH to build upon existing engagement efforts and career training programs in energy and climate resilience at community college programs, pre-apprenticeship programs, joint apprenticeship training centers, trade schools, and 501(c)(3) facilities. HEEHRA Phase I will also fund a tool stipend for low-income and disadvantaged students as well as job placement assistance with HVAC and plumbing employers located in disadvantaged communities. These efforts will be offered on an ongoing cycle through 2027 and include partnerships with:

- 1) The Cypress Mandela Training Center: <https://www.cypressmandela.org/> (operating out of Oakland and Union City),
- 2) Job Train: <https://www.jobtrainworks.org/> (operating out of Silicon Valley)
- 3) Rising Sun Center for Opportunity: <https://risingsunopp.org/> (operating out of Oakland).

Contractor Survey: TECH will also annually survey contractors who support HEEHRA installations to inform continuous improvement of HEEHRA Phase I.

B. Outcome of Engagement

New Contractor Enrollments: In 2024, TECH has over 700 actively enrolled contractors in the program. HEEHRA Phase I will fund additional engagement to increase contractor enrollment in hard-to-reach and disadvantaged communities. The increase includes working through Community Action Partnerships (CAPs)⁴ in San Bernardino County, Kern County, Riverside County, and Fresno County and other CBOs serving DACs, rural and hard to reach

⁴ Community Action Partnerships (CAPs) or Community Action Agencies (CAAs) are local public agencies that deliver services in support of low-income communities and poverty alleviation, including support for the federal Weatherization Assistance Program (WAP), Low-income Home Energy Assistance Program (LIHEAP), and more. See: [Home - CalCAPA](#)

customers to recruit contractors and train them on heat pumps at the TECH Clean California-funded educational centers.

C. Planned Engagement (SMART Goals and Outcomes)

Contractor Incentive: Refer to Type of Incentive discussion in Section 1.I.A.

Building New Economic Equity Workforce Partnerships: HEEHRA Phase I will fund TECH to secure two to three new partnerships with training organizations focused on disadvantaged communities and providing career paths to long-term living wage employment. TECH will also continue discussions with Rising Sun Center for Opportunity to create a partnership opportunity that will bring more disadvantaged workers into the trades to deliver HEEHRA rebates to customers who need them most.

Education and Training: Trainings through TECH are ongoing and continuous. TECH plans to continue or expand its partner with educational facilities across the state in 2024 to purchase new, modern equipment and train educators at community colleges, and conduct outreach in DAC regions and rural communities. TECH will also engage at least 50 percent of trainees from heat pump training centers based in DAC regions. Once the expansions of new heat pump training centers are completed, recruitment of local contractors from the communities will commence through CBO partners. Training for these newly recruited contractors will take place through the heat pump training centers, continuing through June 2025. These training offers will be free to any contractors in the area with HVAC or plumbing licenses. Training will include how to participate in TECH and incentives available to participating contractors for completing projects for customers >80 percent AMI.

II. Supply Chain Partners

Supply Chain Partners include manufacturers, distributors, and other industry partners who provide HEEHRA program-eligible residential electrification equipment and appliance technologies. Working with the supply chain is an important part of HEEHRA Phase I's strategy because distributors are a trusted information source for contractors. This stakeholder group will be engaged through education and information dissemination.

A. Type of Engagement

Education and Information Dissemination: As part of HEEHRA Phase I implementation, TECH will continue to engage manufacturers, distributors, and other industry partners, such as energy raters, to both gather feedback on program design and processes, and to share information on program requirements and status of rebates and technology awareness. The engagement will be via email updates to stakeholders, one-on-one presentations throughout the year, and attending and exhibiting/tabling at dealer events. Engagement with supply chain partners will be continuous and on-going through 2027.

B. Outcome of Engagement

Technology and Rebate Awareness: Educating and providing information to supply chain stakeholders is expected to increase awareness of efficient electrification technologies for contractors and their customers. For example, in 2023, TECH educated 10 California-based HVAC/plumbing sales representative firms and distributors of HVAC and plumbing supplies

with over 1,000 California collective locations, representing supply chain jobs and sustaining community businesses. The initiative also stationed TECH representatives at counter days, dealer presentation events, manufacturer product launches, and dealer sales events. This helped the initiative reach hundreds of contractors who do not normally participate in programs and built relationships with these companies to assist with future marketing and outreach campaigns.

C. Planned Engagement (SMART Goals and Outcomes)

Technology and Rebate Awareness: HEEHRA Phase I funding TECH to partner with at least six distributor/dealer events to train contractors, installers, and technicians on the availability of rebates and heat pump best practices.

Education and Outreach: HEEHRA Phase I funding TECH to provide educational materials to all 10 California-based sales and distribution firms on HEEHRA rebate availability and how their contractor customers can offer these rebates to their customers. In addition, TECH will provide educational materials and outreach to all manufacturers and industry partners in the CAHPP to disseminate through their employees and partners, and vice versa.

III. Local Governments and Programs

Local governments and programs refer to the stakeholder group responsible for permitting/code enforcement, running programs that are complimentary to HEEHRA, and maintaining trusted avenues for communication with potential rebate customers. TECH will collaborate on training and outreach efforts with these stakeholder groups.

A. Type of Engagement

Collaborative Training and Rebate Outreach: TECH partners with many stakeholders that deliver programs, outreach, and education across California. These partners include Regional Energy Networks (RENs), Community Choice Aggregators (CCAs), and local governments. These local partnerships expand the program's reach by being incorporated into other marketing efforts. Several of the local partners have participated in TECH through the Quick Start Grant program.

TECH provides additional support to local partner organizations including advising on codes, permit issues, local training opportunities, and local stakeholder engagement. Collaborations to date include: SoCalREN, BayREN, 3C-REN, Marin Clean Energy, Central Coast Community Energy, San Diego Community Power, Sonoma Clean Power, Peninsula Clean Energy, Redwood Coast Energy Authority, Valley Clean Energy, County of Santa Barbara, County of Marin, County of San Mateo, City of Santa Monica, City of San Francisco, City of San Rafael, City of Palo Alto, City of Sacramento, City of San Luis Obispo, and the City of San Jose. All these partners have helped outreach and market the TECH initiative to the communities they serve through newsletters, email, events, and websites and will continue to play this role in the HEEHRA funded expansion. Engagement with local governments and programs is continuous and ongoing throughout every program cycle through 2027.

B. Outcome of Engagement

Expanded Marketing & Outreach: HEEHRA Phase I funding is expected to broaden the marketing reach and program coordination of TECH to ensure messaging to consumers is consistent and aligned. Each of the listed partners above currently has TECH rebates' availability on their websites and links to *The Switch Is On* website.

C. Planned Engagement (SMART Goals and Outcomes)

Combined and Paired Rebates: TECH plans to expand to new local government partnerships and continue to support and amplify other local offerings that are stackable with HEEHRA rebates, including additional CCAs, RENs, and utility incentive offerings. *The Switch is On* website contains a full listing of local rebate offerings that can be stacked with HEEHRA Phase I rebates.

Marketing and Outreach: TECH will utilize the existing partnership network to broadcast through web, email, and training sessions each quarter the availability of HEEHRA rebates available to stack with existing rebates, customer requirements, and how to find a contractor.

IV. Multifamily Rental Property Owners and Managers

Multifamily rental property owners and managers refer to the stakeholder group accountable for electrification appliance installations in multifamily properties. HEEHRA will fund TECH to engage with this stakeholder group through rebate offers, focused outreach, and technical assistance. Engagement of this stakeholder group is essential to ensure HEEHRA rebates can be used in multifamily properties, and multifamily building occupants can benefit from the program.

A. Type of Engagement

Rebate Offers: TECH offers rebates to multifamily property owners by working through contractors who specialize in multifamily retrofits to locate, outreach, and plan projects. Rebate offers are ongoing throughout every program cycle through 2027.

Focused Outreach: TECH engages multifamily property owners through general email, marketing, webinars, trainings, and media outreach - paired with multifamily owner-specific materials presented through other existing TECH channels. Outreach to multifamily rental property owners and managers is continuous through 2027.

Marketing and Outreach: To engage small multifamily property owners, the initiative will rely on contractor partners to locate suitable projects and explain the benefits of electrification projects to property owners/managers. *The Switch Is On* website serves as a "one-stop-shop" for identifying electrification rebates for consumers, providing an Incentive Finder and Contractor Directory that covers TECH rebates, as well as utility, third-party administrator, and regional rebate and incentive offerings. In 2024, the team will focus on expanding the informational materials on *The Switch Is On* website to focus on the unique challenges and split incentive solutions for property owners. The team will also engage with rental property organizations and renter retrofit working groups to identify engagement opportunities with smaller landlords, support participation, and provide resources on retrofit strategies, rebates, renter protections, and more.

Technical Assistance: HEEHRA Phase I will expand TECH engagement with Mechanical, Electrical and Plumbing engineering consultants (MEPs) and General Contractors (GCs) on technical aspects of electrical infrastructure and central heat pump water heaters (CHPWHs) - two challenges that would benefit from direct outreach to help multifamily property owners/managers perform feasibility studies and plan projects. Technical assistance will be provided on a continuous basis through 2027.

B. Outcome of Engagement

Deployment of Rebates: TECH focused outreach to multifamily property owners and managers will ensure HEEHRA rebates designated for multifamily properties will be used accordingly. For example, TECH reserved \$39M in funds in 2023 and 2024 for multifamily properties. 81 percent of TECH multifamily rebates go to low-income, affordable housing, and disadvantaged communities. Currently, all TECH multifamily incentives are allocated. TECH's multifamily program is scheduled to deploy \$6.75M in rebates for multifamily projects, with 90 percent of the deployed funds going to low-income housing. Multifamily rebates disbursed to date were primarily used in the major urban areas of the San Francisco Bay Area, Sacramento, and Los Angeles. HEEHRA Phase I will expand on these activities and TECH is aiming to exceed the \$1,161,000 low-income multifamily household goal. These efforts will be focused on attaining that goal as well as a minimum \$4,725,312 low-income household goal throughout all of California.

C. Planned Engagement (SMART Goals and Outcomes)

Deployment of Rebates: HEEHRA Phase I will increase TECH engagement and enrollment of small property owners who typically serve naturally occurring affordable housing and have fewer resources (financial, time, staff capacity) to manage properties and engage in programs. This is a hard-to-reach ownership population that is often left behind. TECH will maintain the majority (greater than 75 percent) of multifamily rebate funds going to low-income multifamily properties, with the goal of engaging with a minimum of two rental property organizations and renter retrofit working groups.

V. Low-Income Customers and Communities

Low-Income Customers and Communities refer to the subpopulation of TECH customers and communities who might use HEEHRA rebates to install electrification appliances in their homes and represent households with incomes <80 percent AMI. TECH engages this stakeholder group through CBOs and by providing an informational clearinghouse for all eligible incentives and rebates via *The Switch Is On*, sharing or hosting community events and *The Switch Is On ambassador program*, and supporting the Low-income Ambassador Program (LIAP).

A. Type of Engagement

Informational Clearinghouse for Rebates: *The Switch Is On* website (switchison.org) will serve as a "one-stop-shop" for identifying electrification rebates for consumers, providing an Incentive Finder and Contractor Directory that covers resources from the TECH program, as well as utility, third-party administrator, and regional rebate and incentive offerings for income-qualified customers.

Community Events and Ambassador Program: *The Switch Is On* ambassadors participate in and organize community events with partners in the Bay Area and Southern California.

Support for a Low-Income Advisory Panel: TECH sponsors a LIAP to consult on single-family program design, low-income customer outreach, rebates, career work path outreach, and integration with other community-based stakeholders. The LIAP is composed of 12 representatives from diverse backgrounds with long-standing activism and engagement with tribal, low-income, disadvantaged, disabled, and agricultural issues. Support of the LIAP is continuous throughout every program cycle through 2027.

B. Outcome of Engagement

Advisory Input: The LIAP has consulted on every iteration of TECH's rebate offers and single-family low-income-focused pilots and will meet quarterly to help guide the future of funding by HEEHRA Phase I.

CBO Connection and Community Outreach: The LIAP has connected TECH to several community organizations through their networks and informed strategy for equitable contractor outreach. The *Switch Is On* is recruiting and onboarding a diverse set of 250 community ambassadors in California beginning September 2024 to June 2026. The recruited Ambassadors will come from various regions of the state, with a focus in the Central Valley and Inland Empire. These ambassadors will be trained to effectively promote home electrification, the benefits of being a TECH contractor, and workforce career opportunities in their communities through tabling at community events, spearheading electrification workshops, leading presentations and demos, and hosting home electrification parties. The *Switch Is On* is committed to engage these communities in more than 100 events through June 2026, collaborating closely with the TECH to ensure these events support DAC, in-language, and LMI neighborhoods.

Informing Remediation Costs and Barriers to Electrification of Low-Income

Customers: The LIAP has supplied valuable recommendations on the need for remediation funds and difficulties faced by disabled low-income customers not being able to afford to operate equipment installed through programs.

C. Planned Engagement (SMART Goals and Outcomes)

Advisory Support: The LIAP will continue to meet quarterly and will advise on the impact of program design and decisions on low-income communities, hard-to-reach, disabled, and language-isolated communities and suggest alternative means of outreach and increasing participation.

Coordination and Support for Capacity Building Grant Support: HEEHRA Phase I will fund TECH's support of local educational, outreach, and community engagement campaigns of at least one of the CBO partners as part of the Clean Energy Access grant program to promote HEEHRA TECH rebates.

Electrification Training for CBOs: The initiative will launch a statewide CBO training program delivered through partnerships with electric Investor-Owned Utilities (IOUs) – such as SCE, PG&E, and SDG&E – to train at least 150 CBOs on how to communicate electrification benefits and opportunities to the communities. The CBO training will also be available to all via

The Switch is On website. HEEHRA Phase I will support TECH efforts to have CBOs work in conjunction with at least one IOU to support engagement and more broadly within their communities (including outside of IOU territory) to increase engagement.

VI. Rural Communities

Rural and Tribal Communities are typically hard-to-reach stakeholders that can benefit from HEEHRA rebates and program offerings. TECH engages this stakeholder group with focused outreach and contractor training. Engagement of this stakeholder group will bring awareness of HEEHRA rebates to hard-to-reach populations.

A. Type of Engagement

Focused Outreach and Contractor Trainings: TECH engages Californians through general email, marketing, and media outreach, which is complemented by the dynamic informational clearinghouse, located on *The Switch Is On* website. TECH is engaged with High Sierra Energy Foundation and the Nevada Energy Action Plan Committee on contractor outreach and workforce development strategies. Outreach and Contractor Training for rural communities is ongoing through 2027.

B. Outcome of Engagement

Increased Participation and Access: Through these tactics, HEEHRA Phase I will create additional pathways for rural contractors to participate in training programs and develop trusted relationships.

C. Planned Engagement (SMART Goals and Outcomes)

Increased Participation and Access: TECH funded by HEEHRA plans to develop and support a contractor recruitment campaign supporting rural contractors, including by expanding partnerships with organizations like the High Sierra Energy Foundation.

VII. Tribal Customers

A. Type of Engagement

Focused Outreach and Contractor Trainings: TECH engages Californians through general email, marketing, and media outreach, which is complemented by the dynamic informational clearinghouse, located on *The Switch Is On* website. TECH is building relationships with the Suscol Intertribal Council and the Southern California Tribal Chairmen’s Association in anticipation of 2024 Greenhouse Gas Reduction Funds (GGRF) outreach plans. Outreach and Contractor Training for tribal communities is ongoing through 2027.

B. Outcome of Engagement

Increased Participation and Access: Through these tactics, HEEHRA Phase I will create additional pathways for tribal contractors to participate in training programs and develop trusted relationships.

C. Planned Engagement (SMART Goals and Outcomes)

Increased Participation and Access: HEEHRA Phase I will fund TECH to develop and support an outreach campaign specific to tribes, in partnership with organizations that could

include the Suscol Intertribal Council and Southern California Tribal Chairmen's Association, with whom outreach has already started, or IOU tribal liaisons.

VIII. Language Isolated Customers and Communities

Language Isolated Communities refers to consumers whose primary language is not English. Effective communication on value of electrification and uptake will require partnership with institutions within these communities including CBOs, media channels, and informal networks. TECH will engage these institutions to co-create strategies to increase awareness reduce barriers and facilitate uptake of heat pump technologies. As funding is available, TECH will leverage CPUC Clean Energy Access grant funding for local CBOs to serve communities with tailored marketing, outreach, and contractor engagement. Engaging this stakeholder group increases the inclusivity of access to rebates.

A. Type of Engagement

Tailored Marketing, Outreach, and Contractor Engagement: TECH offers customers the option of searching for contractors who communicate in multiple languages in addition to English. The *Switch Is On* website is currently translatable in seven languages (i.e., English, Chinese, Hindi, Spanish, Filipino, Russian, and French). In-person trainings will be conducted in English while written materials will be available in Spanish, Chinese, Korean, and Vietnamese. HEEHRA Phase I will support TECH onboarding and participation documents for contractors in multiple languages. Engagement of language-isolated communities is continuous and ongoing through 2027.

B. Outcome of Engagement

Increased Accessibility for Customers: Nearly seven million Californians (19 percent) report speaking English "less than very well". Providing information in multiple languages is expected to make rebates available to a large population who might not otherwise understand the rebates are available to them. Offering contractors who speak languages other than English can increase trust and support for customers, reducing the barrier to installing electric appliances.

Increased Accessibility for Contractors: Offering program information to contractors who speak languages other than English can expand spread of information on benefits and value of heat pumps, increase enrollment of non-English speaking contractors, and improve access to future economic opportunities associated with completing electrification appliance installations.

C. Planned Engagement (SMART Goals and Outcomes)

Increased Participation and Access: HEEHRA Phase I will support TECH efforts to increase the number of contractors listed in *The Switch Is On's* Contractor Directory that can offer multiple languages through outreach to CBOs working with language-isolated communities.

Needs Assessment: HEEHRA Phase I will support TECH deployment of a needs assessment to CBOs working with language-isolated communities to determine what materials and support are needed for outreach and to educate customers on the benefits of electrification and recruit contractors who can serve these communities.

SECTION 2: Engaging and Supporting a Skilled and Quality Workforce

In HEEHRA Phase I and other programs, the CEC is committed to supporting a well-qualified, skilled, trained, and stable workforce to enable high-quality jobs within the home energy upgrade industry. A significant amount of this investment is through the engagement of the California contractor workforce, workforce pipeline, and recruitment stakeholders as detailed here in Section 2.

In addition, the CEC applied for the DOE's IRA Section 50123, Training for Residential Contractors (TREC) grants, to expand the clean energy and building decarbonization workforce. Through the TREC Program, the CEC will encourage the HOMES and HEEHRA Program Implementer to develop strong partnerships with contractors throughout the state, expand apprenticeship and pre-apprenticeship opportunities, ensure training course(s) completion particularly in disadvantaged and low-income communities, and for workers to obtain the appropriate and required certifications. The CEC is planning to use the TREC funding to support residential decarbonization training. The workforce education and training under this program applies to both the single-family and multifamily workforce.

Specific to investing in quality jobs, HEEHRA Phase I through TECH implementation will ensure that all participating contractors follow guidelines outlined by the California State Licensing Board (CSLB). TECH supports the High Roads Training Partnership objectives and is considering badging participant contractors through *The Switch Is On*. It is also a priority for TECH to prioritize additional outreach to and participation by smaller "mom and pop" contractors and increase the diversity of its contractor base to reach language-isolated communities, DACs, and other historically underserved communities. TECH will also consider adopting more robust recommendations from the High Roads Training Partnership for larger projects, such as large multifamily retrofits that receive IRA funding.

Indirectly, TECH-enrolled contractors are required as employers to fulfill California minimum wage law under SB 3 (Leno, Chapter 4, Statutes of 2016) and prevailing wage determinations as underlined in CA Cost of Regulations Section 16001(d)⁵ and the Davis-Bacon Act under federal standards⁶. Additionally, they must also adhere to the National Labor Relations Act⁷. Enrolled contractors are required to have an active CSLB contractor's license and the ability to apply for relevant rebates using applicable website applications. They must carry insurance that meets the minimum coverage amounts, as determined by CSLB, and must cooperate with inspection and verification procedures as defined by California Title 24 compliance. TECH is

⁵ [2017-2023 \\$15 Minimum Wage Phase in Requirement](#)

⁶ [Federal Standard of Prevailing Wage and the Inflation Reduction Act](#)

⁷ [National Labor Relations Act](#)

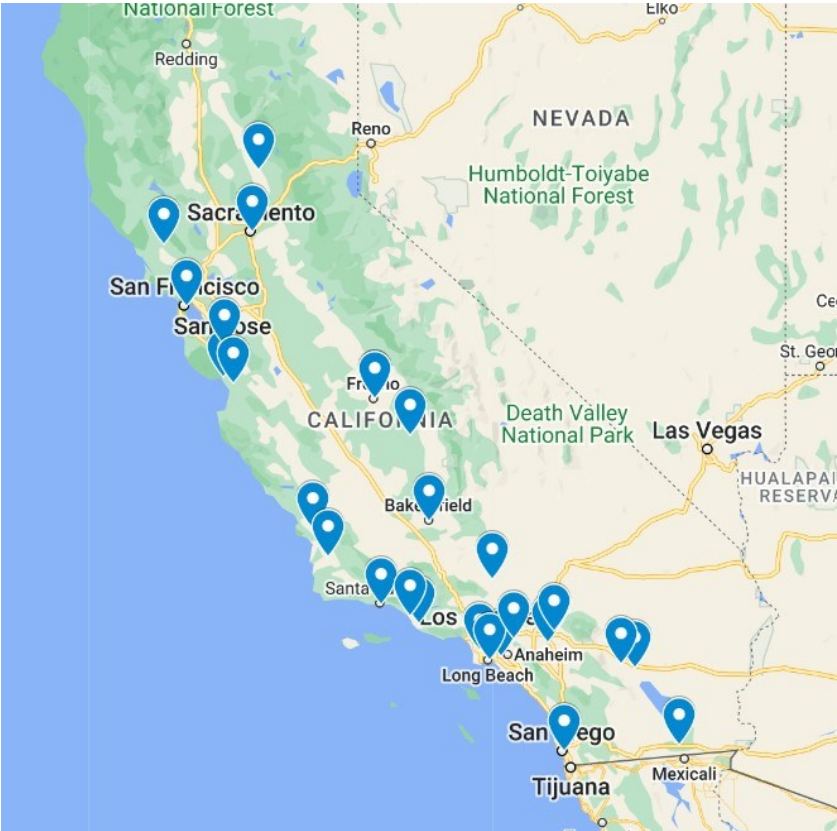
committed to providing workforce training and education, and to pipeline development and career path creation for new trades workers poised to enter the field.

A. Type of Engagement

Contractor Workforce Training and Assistance: TECH’s Training Hub will be updated to include HEEHRA Phase I rebate program information and can be found on *The Switch Is On* website. The Training Hub features a learning management system (LMS) with four required onboarding trainings for TECH funded by HEEHRA contractor enrollment, three multifamily specific trainings, four heat pump HVAC trainings, one heat pump water heater overview training, and two residential electrification business model trainings. In addition to pre-recorded training, TECH provides free in-person residential high-performance HVAC and electrification training with the National Comfort Institute (NCI) and Electrify My Home (EMH). TECH will also provide central heat pump water heater technical assistance, on-site support, and other training required to build capacity in workforce for multifamily retrofits in disadvantaged and low-income communities.

Workforce Pipeline Development and Recruitment: The TECH initiative works with stakeholders to cultivate the workforce to be employed by California Contractors. In HEEHRA Phase I, TECH will engage with this community through educational facility partnerships. For example, TECH has previously advanced workforce pipeline development and recruitment by funding equipment at 12 Community College HVAC and plumbing programs (Figure 2), nine Centers for Employment Training (CET), and 20 United Association Training Centers (UA) located across California. To date, TECH has donated 77 heat pump water heater units and 19 heat pump HVAC units to educational centers. These centers will be focal points to help prepare the incoming workforce to enter the job market and install heat pumps and other residential electrification measures acquired using HEEHRA rebates.

Figure 1: TECH Funded HVAC and Plumbing Education Facilities



Source: TECH Clean California

SECTION 3:

Diversity, Equity, Inclusion, and Accessibility

The CEC will incorporate Diversity, Equity, Inclusion, and Accessibility (DEIA) goals and metrics into HEEHRA Phase I by requiring program implementors to apply key principles and strategies in their outreach and recruitment efforts. Some of these include:

- Establish and maintain partnerships with underrepresented businesses and training organizations, such as but not limited to small businesses or women, minority, disabled veteran, and LGBTQ+ business enterprises.
- Employ job placement assistance to residents of disadvantaged, tribal, rural, and low-income communities, and individuals with barriers to employment.
- Partner with contractors that are based in the community or county where the work will occur.
- Implement outreach strategies in under-resourced communities⁸ by partnering with CBOs to ensure accessibility of HEEHRA Phase I program materials and resources.

Below are the commitments from the CEC and TECH team to achieve these DEIA objectives.

A. HEEHRA Phase I commits to setting a minimum threshold of funding deployed to low-income residences by reserving at least 40.7 percent of rebate funding for low-income households and 10 percent for low-income multifamily, as required by the DOE.

- TECH will allocate the HEEHRA program budgets, publicize allocations, and provide updates to the 3,100 TECH stakeholders which include contractors, the general public, energy agencies, regulatory groups, program implementers, local government, energy providers, and supply chain businesses on the amount of budget committed quarterly. The program will leverage the 2,700+ income verification applications securely received for the Self-Generation Incentive Program (SGIP) program to identify eligible participants in the HEEHRA Phase I program who had not benefitted previously from home electrification equipment and appliance rebates. Also, TECH will work with the contractors listed as installers for these projects to provide information to their customers. Since many of these contractors install weatherization measures for income-qualified programs that meet the categorical eligibility criteria for HEEHRA or have already submitted income documentation for other programs, they may already be embedded in a low-income community and be seen as a trusted messenger. TECH will

⁸ “Under-resourced communities”, as defined by the California Strategic Growth Council, include “Communities of color, tribes, and low-income communities [who] have faced years of disinvestment, systemic discrimination, racism, and disproportionate environmental burdens, many of which have been caused or exacerbated by local and state policies”, and who, as a result, “tend to have limited capacity and resources to access critical funding to address these [health, climate, and other] impacts”. See: [Technical Assistance Guidelines: Core Values - Strategic Growth Council](#).

further explore and build on that trust through contractor training to align with HEEHRA goals and program requirements.

- Low-income multifamily properties will also be engaged through outreach to affordable housing⁹ property owners that already participated in TECH. As approximately 75 percent of TECH multifamily projects serve low-income communities, the engagement will identify additional potential projects in their portfolio that fit HEEHRA Phase I qualification criteria.

B. The HEEHRA Phase I program commits to investing in focused outreach, community outreach events, and community presence of TECH funded by HEEHRA partners.

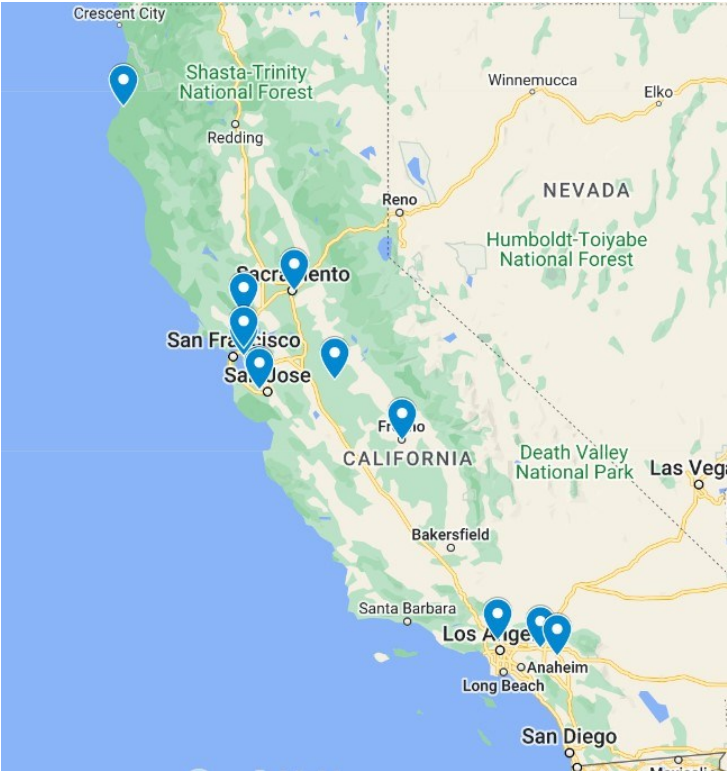
- TECH will combine, analyze, and use existing program participation data, existing *The Switch Is On* website -- the one-stop clearinghouse for California consumers and interested contractors for heat pump technology and electrification incentives and education (<https://switchison.org/contractors/training-hub/>) -- traffic data, and CalEnviroScreen 4.0 data to scope and prioritize earned and paid media opportunities and direct community engagement events. In addition, the HEEHRA Phase I implementation will seek more robust partnerships with community-based organizations to drive, scope, and design marketing and outreach campaigns. More details will be available throughout this document, as well as within the Education and Outreach Plan being developed for HEEHRA Phase I implementation. It will also include support for the development and delivery of media in the language most appropriate for the community, and/or potential recruitment of new region-specific ambassadors – as well as outreach to rural and tribal communities and materials provided in multiple languages to support outreach efforts (such as Spanish, Chinese, and Vietnamese).

C. HEEHRA Phase I commits to continuing to support and refine its strategies based on insights from the Low-Income Ambassador Panel (LIAP) currently operated as part of TECH.

TECH's LIAP is comprised of ambassadors who will represent a total of nine regions (Figure 1) across the state and consists of low-income program administrators, low-income policy experts, tribal representatives, and disadvantaged community business representatives. Each of these representatives work for and within low-income communities across the state. These representatives will serve as a means for TECH to receive and integrate feedback from community leaders and advocates on improvements in process and outreach strategies for HEEHRA Phase I program funding. The LIAP meets quarterly to review program outreach strategies and incentive plans.

⁹ TECH Clean California defines affordable housing as housing where "at least 66 percent of living units are <80 percent AMI or deed-restricted housing; or subsidized deed-restricted housing". This exceeds the DOE requirements, that at least 50 percent of units are <80 percent AMI or deed-restricted. For TECH program definition, see: [TECH Public Reporting Equity Budget and Spending \(techcleanca.com\)](https://www.techcleanca.com/tech-public-reporting-equity-budget-and-spending)

Figure 2: Low-Income Ambassador Panel Member Locations



Source: Energy Solutions

D. HEEHRA Phase I commits to investing in free contractor training and education in disadvantaged communities.

TECH will continue to invest in and expand on select workforce and contractor training partnerships, events, and investments that focus on disadvantaged communities, and support accessibility to and increased awareness of HEEHRA Phase I rebates. This will include educational facilities, supporting job placement and apprenticeship opportunities in disadvantaged communities.

SECTION 4:

Justice40 Initiative

CalEnviroScreen 4.0 was created by the California Environmental Protection Agency (CalEPA) and Office of the Environmental Health Hazard Assessment (OEHHA) to “identify California communities most affected by many sources of pollution and where people are often especially vulnerable to pollution’s effects”¹⁰. CalEPA identifies four types of geographic areas as DACs:

1. Census tracts receiving the highest 25 percent of overall scores in CalEnviroScreen 4.0 (1,984 tracts).
2. Census tracts lacking overall scores in CalEnviroScreen 4.0 due to data gaps but receiving the highest 5 percent of CalEnviroScreen 4.0 cumulative pollution burden scores (19 tracts).
3. Census tracts identified in the 2017 DAC designation as disadvantaged, regardless of their scores in CalEnviroScreen 4.0 (307 tracts).
4. Lands under the control of federally recognized Tribes. For purposes of this designation, a Tribe may establish that a particular area of land is under its control even if not represented as such on CalEPA’s DAC map and therefore should be considered a DAC by requesting a consultation with the CalEPA Deputy Secretary for Environmental Justice, Tribal Affairs and Border Relations at TribalAffairs@calepa.ca.gov.¹¹

CalEnviroScreen’s census tract scoring methodology assesses cumulative impacts by multiplying the averages of two Pollution Burden components and two Population Characteristics components. CEC and TECH uses the CalEnviroScreen 4.0 definition of a DAC, which is based on the Census tract in which a project occurred. In the TECH Working Dataset, each TECH project is labeled via the “Disadvantaged Community” column as either TRUE or FALSE.

Each component has a set of indicators. The Pollution Burden component encompasses Exposures (indicators include ozone concentrations, PM2.5 concentration, children’s lead risks from housing, diesel PM emissions, drinking water contaminants, pesticide use, toxic releases from facilities, and traffic density) and Environmental Effects (indicators include solid waste sites and facilities, groundwater threats, hazardous waste, impaired water bodies, and cleanup sites). The Population Characteristics component encompasses Exposures (indicators include asthma, cardiovascular disease, and low birth weight infants) and Socioeconomic Factors (indicators include educational attainment, housing-burdened low-income households, linguistic isolation, poverty, and unemployment). More detailed information is available on California CalEnviroScreen webpage.

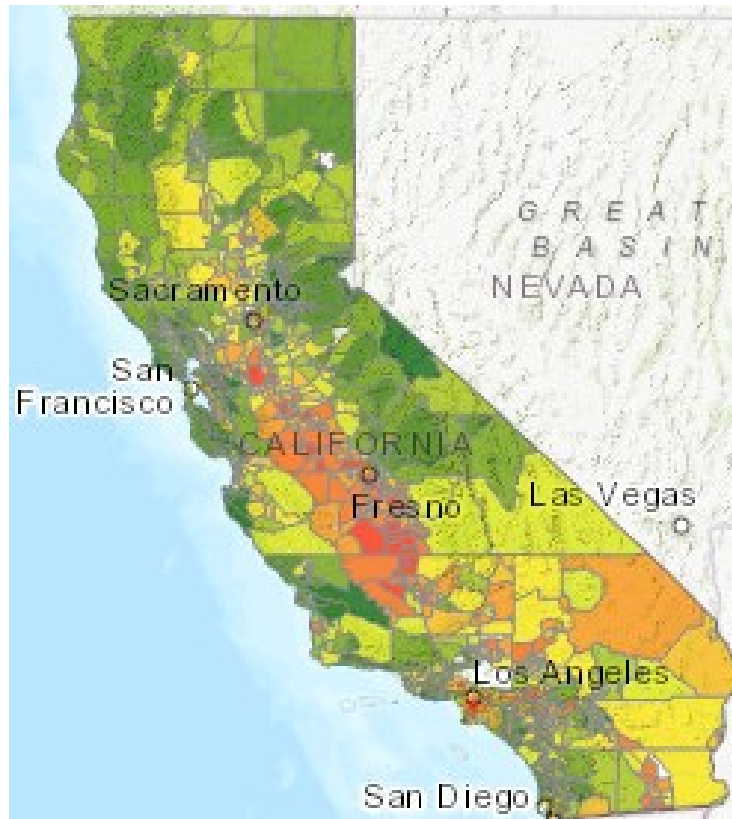
Additionally, the CEC plans to use the SB 535 Disadvantaged Communities map (Figure 3) to identify under-resourced communities within California. The SB 535 Disadvantaged

¹⁰ [CalEnviroScreen 4.0](#)

¹¹ [SB 535 Disadvantaged Communities](#)

Communities map encompasses territories defined by the Justice40 initiative as well as the Council of Environmental Quality's Climate and Economic Justice Screening Tool (CEJST). The under resourced communities listed in the SB 535 Disadvantaged Communities map and the CalEnviroScreen 4.0 map will be prioritized for home electrification rebates as HEEHRA Phase I will be focused on low-income, single-family, high-impact electrification through air source heat pump deployments and acceleration of electrification for affordable and LMI multifamily homes.

Figure 3: SB 535 Map of Disadvantaged Communities from CalEnviroScreen4.0



Source: [OEHHA website](#)

I. Methods of Rebate Distribution to DACS

The CEC and TECH will encourage delivery of home electrification and appliance rebates to disadvantaged communities through the following methods:

- Facilitate customer satisfaction surveys and include account management for participating contractors.
- Configure the use of an online tool to determine income eligibility. The tool will be made accessible to installers, customers, and other participants.
- Develop a delivery plan to ensure rebates are appropriately focused to DAC regions.
- Integrate with existing TECH activities to take advantage of current systems, under resourced community marketing, and registered contractor networks.
- Configure the Rebate Clearinghouse Platform to process HEEHRA rebate applications.

- Host HEEHRA rebate information on a program participant-facing website.

The CEC will require Energy Solutions to coordinate with the administrators of the HOMES/HER Program and the State’s Equitable Building Decarbonization (EBD) Direct Install Program. Neither of these programs have launched as of the posting of this report, and further integration will be defined as they launch.

II. HEEHRA/TECH Program Design and Compliance Milestones

A. A decrease in environmental exposure and indoor air quality burdens

Disadvantaged Community Benefit: All low-income households participating in TECH will indirectly benefit over the long-term by retrofits enabled by HEEHRA rebates. TECH team will involve CBOs in benefit delivery by continuing to leverage the LIAP to inform and weigh in on strategies to enhance equitable outcomes – including air quality and environmental burden reduction strategies. Replacement of gas fuel appliances improves indoor air quality through reduction of exposure to pollutants. Some examples of pollutants from gas appliances that worsen both indoor and outdoor air quality include carbon monoxide, nitrogen oxides, formaldehyde, and the fine particulate matter known as PM2.5.

Milestones and Metrics: Milestones will include completion of the relevant heat pump retrofit (i.e. HVAC, HPHW), and post-install estimates of air quality improvement as reported through the CPUC adopted Societal Cost Test. Air quality impacts are estimated and reported based on emissions reduction and the value of resultant public health benefits from those air quality changes.

B. An increase in the clean energy job pipeline and job training for individuals in equity communities

Disadvantaged Community Benefit: All disadvantaged communities where TECH training and workforce development offerings are extended will directly benefit from reduction of fossil fuel burning equipment. Benefits will be delivered by TECH through educational institutions, training partners, and CBOs, as described in section B at the time of hosted workforce development investments throughout the initiative cycle. As noted above in the California Contractor Workforce section and in Community Based Organizations and Tribal Communities, TECH will work with CBOs and local agencies to recruit contractors specifically from CalEnviroScreen 4.0 designated DAC communities, as well as offer free training to contractors located in and servicing DAC regions. TECH will fund equipment and training for education facilities located in DAC regions to provide next-generation workforce training and will also offer a \$200 incentive directly to all participating HVAC and plumbing contractors for each >80 percent AMI project completed accessing HEEHRA rebates.

Milestones and Metrics: Milestones will include the completion of additional contractor enrollment, technical education, and training events. The numbers of enrolled contractors, trainings and job training events, and college/trade school/training center partnerships in disadvantaged communities will be tracked and reported. TECH will report on investments made in workforce development (specifically in DACs), training, contractor rebates, educational efforts, recruiting efforts, and more.

C. An increase in energy and climate resilience

The CEC and TECH will help residential electrification drive long-term energy and climate resilience in communities, including reducing climate and health risks from fossil gas and other fuels usage and increased comfort as extreme weather events become more commonplace. In California, this is particularly relevant in DACs with high heat burdens and extreme heat events who will see an increasing health and safety need for access to cooling in the coming years. Through the dissemination of efficient electric heat pumps for air heating and cooling, TECH can support energy and climate resilience in disadvantaged communities.

TECH will continue to include notices on contractor invoices that there may be utility bill increases from greater usage such as air conditioning in summer.

Disadvantaged Community Benefit: All households participating in TECH, particularly in climate zones most susceptible to extreme heat will indirectly benefit through long-term access to efficient electric HVAC and water heating heat pumps enabled through HEEHRA rebates. TECH will involve CBOs by leveraging the LIAP to inform and weigh in on strategies to enhance equitable outcomes – including increasing heat pump and parallel clean energy technology adoption and education/awareness building within DAC communities.

Milestones and Metrics: Milestones will include the delivery of rebates and retrofits in households in DAC. The number of participating households in DAC, particularly in climate zones most susceptible to extreme heat (based on guidance and data tools from the California OEHHA) will be tracked. TECH will report on the portion of projects delivered to climate zones most susceptible to extreme heat, as a measure of access to efficient cooling and increased climate resilience.

Unanticipated Barriers and Strategies to Address Barriers: The most critical barrier to achieving this benefit will be if the TECH is unable to support, or doesn't get traction in, communities and households where there is low current air conditioning adoption but high heat burden. In those instances, with the addition of a cooling load from air conditioning, households are less likely to see positive or neutral bill impacts – and are more likely to see their bills increase post-retrofit. As a result, many households will be unable or unwilling to retrofit with a heat pump without further bill assistance or assurances. In these cases, TECH will continue to work with existing and evolving energy efficiency and weatherization programs to highlight opportunities to further enhance efficiency upfront in a household to minimize negative bill impacts. TECH will continue to include notices on contractor invoices that there may be utility bill increases from greater usage such as air conditioning in summer.

D. Anticipated or planned efforts to address or reduce potential negative environmental or financial impacts from HEEHRA Phase I

To address the potential for negative environmental impacts stemming from the installation of HEEHRA Phase I measures, TECH has identified the existing and planned efforts outlined below.

Air Pollution: To help curb increases in air pollution from higher cooling loads and higher peak electricity demand, TECH specifies Energy Star certified and high efficiency rated air source heat pump equipment to deliver better energy efficiency and reduction of peak loads. Similarly, to limit increases in air pollution from refrigerant leakages and HFCs, CSLB requires all technicians handling refrigerants to have EPA 608 Technician Certification to minimize the

risk of refrigerant leaks. TECH offers free, optional training on managing refrigerants.

Equipment Recycling: The HEEHRA Phase I program requires, wherever possible, recycling of old appliances and equipment. The program is seeking public input on ways to recycle old HVAC, water heating, and appliances in areas where recycling is not available today. This will be an ongoing initiative, leveraging manufacturer and local partnerships wherever possible to increase the recycling success rate of the program over time.

Energy Burden: To mitigate any increases in consumer energy prices or utility bills from increased usage of air conditioning or heating, TECH specifies Energy Star certified and high-efficiency rated air source heat pump equipment to deliver efficiency and reduction of peak loads. The Consumer Protection Plan will provide additional detail on how rebate recipients are educated on the potential impact of heat pump adoption.

For some customers, the addition of AC and the corresponding bill increase may be an acceptable expense to acquire cooling as temperatures rise due to climate change. Contractors will notify homeowners of potential utility bill impacts, which include factors such as:

- Changing customer use of heating and cooling equipment, which varies by climate zone and weather conditions.
- Previous air conditioning use.
- Utility electricity rates.
- Time of use (peak vs non-peak).
- Building thermal control and construction vintage.
- Efficiency of previous heating and cooling equipment.
- Demand response and load-shifting practices.

This concludes the Community Benefits Plan for HEEHRA Phase I.

Appendix A summarizes the outcomes and objectives of the Community Benefits Plan.

Contact Information

The CEC is always open for public input and comment. Please comment on our docket and subscribe to our list serve on the IRA Residential Rebates Website. More information about the IRA Residential Rebates can be found on our FAQ page. Additional questions can be directed to our Customer Support Center.

Website	https://www.energy.ca.gov/programs-and-topics/programs/inflation-reduction-act-residential-energy-rebate-programs
FAQ page	https://www.energy.ca.gov/programs-and-topics/programs/inflation-reduction-act-residential-energy-rebate-programs/faq-ira
Customer Support Center	IRaresidentialenergyrebates@energy.ca.gov

APPENDIX A:

Summary Table: Community Benefits Outcomes and Objectives

Category and Commitment	Existing or Planned	Budget Tranche 1 milestone	Budget Tranche 2 milestone
Community and Labor Engagement			
Section 1. II. C. Supply Chain Partner Engagement	<input type="checkbox"/> Partner with at least six distributors/dealers to host events to train contractors, installers, and technicians	<i>6 events including measurement and analysis of outreach effectiveness in DACs and low-income households.</i>	<i>6 events including measurement and analysis of outreach effectiveness in DACs and low-income households.</i>
Section 1. III. Consumer Awareness and Education	<input type="checkbox"/> Conduct focused low-to-moderate income homeowner marketing, community outreach, and education campaigns with the goal of exceeding the 2023 measured 26% positive perception among consumers of home electrification and 10% positive increase in awareness via <i>The Switch Is On</i> and other local partnerships.	<i>Measure and meet or exceed 26% positive perception with low-to-moderate income homeowners/ eligible entities.</i>	<i>Measure and meet or exceed 26% positive perception with low-to-moderate income homeowners/ eligible entities.</i>
Section 1. IV. Multifamily Rental Property Owner and Manager Engagement	<input type="checkbox"/> Maintain that the majority (>75%) of multifamily rebate funds will go to low-income, multifamily properties.	<i>Achieve 75% or more multifamily rebates deployment to low-income, multifamily properties.</i>	<i>Achieve 75% or more multifamily rebates deployment to low-income, multifamily properties.</i>
Section 1.III.A. Local Government Partnerships	<input type="checkbox"/> Continue and expand existing partnerships with CCAs and local governments, such as the current Central Coast	<i>Maintain CCA and local government relationships with focus on quantifying and delivering low-income</i>	<i>Maintain CCA and local government relationships with focus on quantifying and delivering low-</i>

	Community Energy (partnership, CCCE) of co-funding and leveraging funding to stack with HEEHRA rebates.	<i>and disadvantaged community results.</i>	<i>income and disadvantaged community results.</i>
Section 1. VI. Community-Based Organization and Native American Tribes Partnerships	<input type="checkbox"/> Develop and support an outreach campaign specific to California Native American tribes. <input type="checkbox"/> Develop and support the local educational, outreach, and community engagement campaigns of at least one of the CBO partners for HEEHRA Phase I. <input type="checkbox"/> Coordinate a workforce recruitment and training effort with at least one of the CBO partners as part of the Clean Energy Access grant program.	<i>Launch tribal partnership initiative.</i> <i>Launch Clean Energy Access CBO grantee partnerships.</i>	<i>Continue and refine tribal partnership initiative.</i> <i>Continue and refine CBO partnerships.</i>
Section 1. V. Low-Income Customer Outreach	<input type="checkbox"/> Leverage the Low-Income Ambassador Panel through continued quarterly meetings to support rebate strategies for Phase I and past Phase I.	<i>Host and analyze input from quarterly advisory meetings and revise program as needed.</i>	<i>Host and analyze input from quarterly advisory meetings and revise program as needed.</i>
Section 1. VI. C. Rural Contractor Training and Outreach	<input type="checkbox"/> Develop and support a contractor recruitment campaign in support of rural contractors, including by expanding partnership with High Sierra Energy Foundation.	<i>Launch rural contractor recruitment campaign.</i>	<i>Continue and refine rural contractor recruitment.</i>

<p>Section 1. VII. C. Tribal Contractor Training and Outreach</p>	<p><input type="checkbox"/> Develop and support an outreach campaign specific to tribal communities, in partnership with organizations such as the Suscol Intertribal Council and Southern California Tribal Chairmen's Association.</p>	<p><i>Launch tribal contractor recruitment campaign.</i></p>	<p><i>Continue and refine tribal contractor recruitment.</i></p>
<p>Section 1. VIII. Accessibility and Support for Language Isolated Community</p>	<p><input type="checkbox"/> Increase contractor list of installers and maintenance technicians/companies that can offer multiple language support by 20.</p>	<p><i>Launch language isolated community contractor campaign.</i></p>	<p><i>Train and analyze results, continue contractor support, and refine campaign.</i></p>
Engaging and Supporting a Skilled and Qualified Workforce			
<p>Section 2. A. Contractor Workforce Training and Assistance</p>	<p><input type="checkbox"/> Train a minimum of 200 new contractors in 2024, with a goal to focus recruitment within DACs and rural communities.</p> <p><input type="checkbox"/> Survey participant TECH-certified contractors (annually at a minimum) to inform improved program communications and offerings.</p> <p><input type="checkbox"/> TECH Clean California funded by HEEHRA will offer virtual training with at least 50% of the participants being from DACs.</p>	<p><i>200 additional trained contractors, including specification of where business is located, and number of low-income and DACs households served.</i></p> <p><i>Contractor survey(s).</i></p>	<p><i>100 additional trained contractors, including specification of where business is located, and number of low-income and DACs households served.</i></p> <p><i>Contractor survey(s).</i></p>
<p>Section 2. A. Workforce Pipeline Development</p>	<p><input type="checkbox"/> Develop new partnership(s) with community workforce development programs,</p>	<p><i>2-3 new educational facility partnerships and reporting of results.</i></p>	<p><i>2-3 new educational facility partnerships and reporting of results.</i></p>

	community colleges, and CBOs.		
Section 1. II. C. Supply Chain Partner Engagement	<input type="checkbox"/> Continue education and dissemination work with at least the 10 existing CA-based HVAC and plumbing sales representatives and distributors.	<i>10 partnerships maintained with emphasis and reporting of DACs and/or low-income outreach and installations with emphasis and reporting of DACs and/or low-income outreach and installations.</i>	<i>10 partnerships maintained with emphasis and reporting of DACs and/or low-income outreach and installations.</i>
Diversity, Equity, Inclusion, and Accessibility (DEIA)			
Section 3. A. Equitable Rebate Funding	TECH Clean California funded by HEEHRA commits to setting a minimum threshold of funding deployed to low-income residences (as one component of the DEIA strategy) by reserving a minimum of 50.7% of rebate funding for low-income households, including a minimum of 10% for low-income multifamily, as required by the DOE.	<i>Achieve minimum low-income rebate delivery goals: \$4,725,312 minimum low-income and \$1,161,010 multifamily low-income housing.</i>	<i>Achieve 40.7% low-income and 10% low-income multifamily goals.</i>
Section 3. B. Education and Outreach	TECH Clean California commits to investing in focused community outreach, media campaigns, community outreach events, community presence of TECH Clean California partners.	<i>Language expansion for The Switch Is On.</i> <i>Explore region-specific ambassador program.</i> <i>Implement outreach strategies and under-resourced communities by partnering with CBOs to ensure accessibility of HEEHRA Phase I program materials and resources.</i>	<i>Analyze results from work on accessibility, tribal and rural strategy, language isolated strategy.</i> <i>Modify program approach accordingly to increase effectiveness.</i>

		<p><i>Launch tribal and rural strategy.</i></p> <p><i>Launch language isolated strategy.</i></p>	
<p>Section 3. C. Low-Income Ambassador Panel (LIAP)</p>	<p>TECH Clean California funded by HEEHRA commits to continuing to support and refine its strategies based on insights from the Low-Income Ambassador Panel.</p>	<p><i>Leverage reports and insights from quarterly meetings to improve program design and effectiveness.</i></p>	<p><i>Leverage reports and insights from quarterly meetings to improve program design and effectiveness.</i></p>
<p>Section 3. D. DAC Contractor Engagement</p>	<p>TECH Clean California funded by HEEHRA commits to investing in recruiting, training, and educating contractors in disadvantaged communities.</p>	<p><i>Build and enhance contractor training partnerships in DACs.</i></p> <p><i>Continue and expand engagement with low-income and disadvantaged community colleges and local apprenticeships programs.</i></p> <p><i>Establish and maintain partnerships with underrepresented businesses and training organizations, such as but not limited to small businesses or women, minority, disabled veteran, and LGBTQ+ business enterprises.</i></p> <p><i>Employ job placement assistance to residents of disadvantaged, tribal, rural, and low-income communities, and</i></p>	<p><i>Evaluate results and build and enhance contractor training partnerships in DACs.</i></p> <p><i>Continue and expand engagement with low-income and disadvantaged community colleges and local apprenticeships programs.</i></p>

		<i>individuals with barriers to employment.</i>	
Justice40 Initiative			
Section 4. II. A. Air Quality	TECH Clean California funded by HEEHRA will report on expected and modeled indoor air quality improvements expected among equity households, including low-income households, for participant communities.	<i>Annual reporting and analysis for low-income and DAC recipient households.</i>	<i>Annual reporting and analysis applied to improve program effectiveness.</i>
Section 4. II. B. Workforce Development	TECH Clean California funded by HEEHRA will report on investments made in workforce development, specifically in DACs – training, educational efforts, recruiting efforts, and more.	<i>Annual reporting and analysis for WE&T training efforts in DACs.</i>	<i>Annual reporting and analysis applied to program improvement.</i>
Section 4. II. C. Climate Resilience	TECH Clean California funded by HEEHRA will report on the portion of projects delivered to climate zones most susceptible to extreme heat as a measure of access to efficient cooling and increased climate resilience.	<i>Annual reporting and analysis for target climate zones.</i>	<i>Annual reporting and analysis applied to program improvement.</i>