



**CALIFORNIA
ENERGY COMMISSION**



**California Energy Commission
January 24, 2024 Business Meeting
Backup Materials for Agenda Item No 11:
Building Decarbonization Coalition**

The following backup materials for the above-referenced agenda item are available in this PDF packet as listed below:

1. Proposed Resolution
2. Contract Request Form
3. Scope of Work

STATE OF CALIFORNIA
STATE ENERGY RESOURCES
CONSERVATION AND DEVELOPMENT COMMISSION

RESOLUTION: **Building Decarbonization Coalition**

RESOLVED, that the State Energy Resources Conservation and Development Commission (CEC) adopts the staff CEQA findings contained in the Agreement or Amendment Request Form (as applicable); and

RESOLVED, that the CEC approves agreement 500-23-002 with Building Decarbonization Coalition for a \$9,000,000 contract, authorized by Assembly Bill (AB) 102 (Chapter 38, Budget Act of 2023), to manage a public-private partnership dedicated to achieving Governor Newsom’s goal of installing 6 million heat pumps by 2030 through a consumer technical assistance, education, and outreach program to assist Californians in leveraging federal Inflation Reduction Act incentives and tax credits to decarbonize homes and address heat pump adoption barriers; and

FURTHER BE IT RESOLVED, that the Executive Director or their designee shall execute the same on behalf of the CEC.

CERTIFICATION

The undersigned Secretariat to the CEC does hereby certify that the foregoing is a full, true, and correct copy of a resolution duly and regularly adopted at a meeting of the CEC held on January 24, 2024.

AYE:
NAY:
ABSENT:
ABSTAIN:

Dated:

Kristine Banaag
Secretariat



CONTRACT REQUEST FORM (CRF)

A. New Agreement Number

IMPORTANT: New Agreement # to be completed by Contracts, Grants, and Loans Office.

New Agreement Number: 500-23-002

B. Division Information

1. Division Name: Reliability, Renewable Energy & Decarbonization Incentives Division
2. Agreement Manager: Andrea Hoppe
3. MS-Not applicable
4. Phone Number: (916) 467-3667

C. Contractor's Information

1. Contractor's Legal Name: Building Decarbonization Coalition
2. Federal ID Number: 85-4008764

D. Title of Project

Title of project: California Heat Pump Public-Private Partnership

E. Term and Amount

1. Start Date: February 1, 2024
2. End Date: January 31, 2027
3. Amount: \$9,000,000.00

F. Business Meeting Information

1. Operational agreement to be approved by Executive Director? No
2. Are the ARFVTP agreements \$75K and under delegated to Executive Director? No
3. The Proposed Business Meeting Date: 01-24-2024
4. Consent or Discussion? Discussion
5. Business Meeting Presenter Name: Christine Collopy
6. Time Needed for Business Meeting: 5 minutes
7. The email subscription topic is: Efficiency - Decarbonization

Agenda Item Subject and Description:

Building Decarbonization Coalition. Proposed resolution approving agreement 500-23-002 with Building Decarbonization Coalition for a \$9,000,000 contract, authorized by Assembly Bill (AB) 102 (Chapter 38, Budget Act of 2023), to manage a public-private partnership dedicated to achieving Governor Newsom's goal of installing 6 million heat pumps by 2030 through a consumer technical assistance, education, and outreach program to assist Californians in leveraging federal Inflation Reduction Act incentives and tax credits to decarbonize homes and address heat pump adoption barriers. (General Fund Funding)
Contact: Christine Collopy

G. California Environmental Quality Act (CEQA) Compliance

1. Is Agreement considered a "Project" under CEQA?

No

If yes, skip to question 2.



If no, complete the following (PRC 21065 and 14 CCR 15378) and explain why Agreement is not considered a "Project":

Agreement will not cause direct physical change in the environment or a reasonably foreseeable indirect physical change in the environment because: the agreement's purpose is to conduct technical assistance, outreach, and education to facilitate heat pump adoption. The Agreement will not have a negative environmental impact as the nature of the services therein will not result in any environmental impacts.

2. If Agreement is considered a "Project" under CEQA answer the following questions.

a) Agreement **IS** exempt?

No

Statutory Exemption?

No

If yes, list PRC and/or CCR section number(s) and separate each with a comma. If no, enter "None" and go to the next question.

PRC section number: PRC section number 1, PRC section number 2. Or, "None"

CCR section number: CCR section number 1, CCR section number 2. Or, "None"

Categorical Exemption?

No

If yes, list CCR section number(s) and separate each with a comma. If no, enter "None" and go to the next question.

CCR section number: CCR section number 1, CCR section number 2. Or, "None"

Common Sense Exemption? 14 CCR 15061 (b) (3)

No

If yes, explain reason why Agreement is exempt under the above section. If no, enter "Not applicable" and go to the next section.

Enter "Not applicable" or reason why Agreement is exempt under the above section

b) Agreement **IS NOT** exempt.

IMPORTANT: consult with the legal office to determine next steps.

No

If yes, answer yes or no to all that applies. If no, list all as "no" and "None" as "yes".

Additional Documents	Applies
Initial Study	No
Negative Declaration	No
Mitigated Negative Declaration	No
Environmental Impact Report	No
Statement of Overriding Considerations	No
None	Yes



H. Subcontractors

List all Subcontractors listed in the Budget (s). Insert additional rows if needed. If no subcontractors to report, enter “No subcontractors to report” and “0” to funds. **Delete** any unused rows from the table

Subcontractor Legal Company Name	Budget
Ardenna Energy, LLC	\$95,000
Cohen Ventures, Inc. DBA Energy Solutions	\$95,000
California Building Performance Contractors Association DBA Efficiency First California	\$95,000
Shelton Communications Group, Inc.	\$95,000
TBD	\$25,000

I. Key Partners

List all key partner(s). Insert additional rows if needed. If no key partners to report, enter “No key partners to report.” **Delete** any unused rows from the table.

Key Partner Legal Company Name
No key partners to report.

J. Budget Information

Include all budget information. Insert additional rows if needed. If no budget information to report, enter “N/A” for “Not Applicable” and “0” to Amount. **Delete** any unused rows from the table.

Funding Source	Funding Year of Appropriation	Budget List Number	Amount
General Fund	FY 2023-24	BL# 500.002	\$9,000,000.00

TOTAL Amount: \$9,000,000.00

R&D Program Area: Not applicable

Explanation for “Other” selection Not applicable

Reimbursement Contract #: Not applicable

Federal Agreement #: Not applicable



K. Contractor’s Contact Information

1. Contractor’s Administrator/Officer

Name: Romy Banks
Address: 198 Ely Road North
City, State, Zip: Petaluma, CA 94954
Phone: (412) 302-4784
E-Mail: romy@buildingdecarb.org

2. Contractor’s Project Manager

Name: Leada Fuller
Address: 198 Ely Road North
City, State, Zip: Petaluma, CA 94954
Phone: (503) 330-0892
E-Mail: fulleramarashi@buildingdecarb.org

L. Selection Process Used

There are three types of selection process. List the one used for this CRF.

Selection Process	Additional Information
Competitive Solicitation #	Not Applicable
Non Competitive Bid (<i>Attach DGS-GSPD-09-007</i> https://www.dgs.ca.gov/PD/Forms)	Not Applicable
Exempt	Exempt per Assembly Bill No. 102 Budget Act of 2023 Chapter 38, Section 68 1(b)

M. Contractor Entity Type

Contractor Entity Type	Yes or No?
Private Company (<i>including non-profits</i>)	Yes
CA State Agency (<i>including UC and CSU</i>)	No
Government Entity (<i>i.e. city, county, federal government, air/water/school district, joint power authorities, university from another state</i>)	No

N. Is Contractor a certified Small Business (SB), Micro Business (MB) or Disabled Veterans Business Enterprise (DVBE)?

The contractor is a certified: Not applicable



O. Civil Service Considerations

- a. Not Applicable (Agreement is with a CA State Entity or a membership/co-sponsorship)? No
- b. Public Resources Code 25620, et seq., authorizes the Commission to contract for the subject work. (PIER) No
- c. The Services Contracted: No

If no, go to the next question. If yes, which of the following applies to the contract? More than one can apply, list each answer choice, and separate them with a comma:

- are not available within civil service
- cannot be performed satisfactorily by civil service employee
- are of such a highly specialized or technical nature that the expert knowledge, expertise, and ability are not available through the civil service system

The following applies to the contract: are not available within civil services, and are of such a highly specialized or technical nature that the expert knowledge, expertise, and ability are not available through the civil service system.

- d. The Services are of such an urgent, temporary, or occasional nature that the delay to implement under civil service would frustrate their very purpose?

The services are additionally both urgent and temporary.

Justification:

This Agreement’s consumer technical assistance, education, and outreach program; Blueprint and Operational Plan development; and facilitating the heat pump adoption barriers under the California Heat Pump Private-Public Partnership are not available in civil service and are urgent. The unique challenges to meeting the goal of installing 6 million heat pumps by 2030 is timely. Ramping up heat pump production, and facilitating educating public and private sectors need to converge in order to meet this goal. The proposed contractor is uniquely qualified, knowledgeable, resourced, prepared, and experienced to conduct the services in the scope of work, all of which, combined, are simply not available within civil service.

P. Payment Method

- 1. Is the payment method Reimbursement, Advanced Payment, or Other?
Reimbursement.
If Other, explain:
- 2. If Reimbursement, is it in arrears based on Itemized Monthly, Itemized Quarterly, Flat Rate, or One-time?
Monthly.

Q. Retention

Is Agreement subject to retention? Yes

If Yes, Will retention be released prior to Agreement termination? Yes

R. Justification of Rates



Rates are commensurate with the rates and classifications for similar services. When comparing rates against posted CMAS rates, the proposed contractor’s rates were substantially below like rates for similar classifications.

S. Disabled Veteran Business Enterprise Program (DVBE)

Provide requested additional information.

- 1. Exempt (Interagency/Other Government Entity) No
- 2. Meets DVBE Requirements DVBE No
Amount: \$ 0 DVBE %:
- 3. Is the Contractor Certified DVBE or Subcontracting with a DVBE? If subcontracting with a DVBE, provide the name of the DVBE company. If none applies, enter “Not Applicable”.

Enter Contractor Certified DVBE or Subcontracting with a DVBE. If subcontracting, provide name of DVBE company. If none applies, enter “Not Applicable”.

- 4. Contractor selected through CMAS or MSA with no DVBE participation No
- 5. Requesting DVBE Exemption (attach CEC 95) Yes

T. Miscellaneous Agreement Information

- 1. Will there be Work Authorizations? No
- 2. Is the contractor providing confidential information? No
- 3. Is the contractor going to purchase equipment? No
- 4. What is the check frequency of the progress reports? Monthly, Quarterly, or Other? If Other, please provide explanation.

Monthly

- 5. Will a final report be required? Yes
- 6. Is the Agreement, with amendments, longer than three years? If yes, why?

No

U. The following items should be attached to this CRF (as applicable)

List all items that should be attached to this CRF by entering “Yes” or “No”.

Item Number	Item Name	Attached
1	Exhibit A, Scope of Work/Schedule	Yes
2	Exhibit B, Budget Detail	Yes
3	DGS-GSPD-09-007, NCB Request	No
4	CEC 95, DVBE Exemption Request	Yes
5	Awardee CEQA Documentation	No
6	Resumes	Yes
7	CEC 105, Questionnaire for Identifying Conflicts	Yes



Approved By

Individuals who approve this form must enter their full name and approval date in the MS Word version.

Agreement Manager: Andrea Hoppe

Approval Date: December 22, 2023

Office Manager: Christine Collopy

Approval Date: December 22, 2023

Deputy Director: Christine Collopy

Approval Date: December 22, 2023

Exhibit A
SCOPE OF WORK

TASK LIST

Task #	Task Name
1	Agreement Management
2	Planning and Launch
3	Partner Management and Convening
4	Strategic Planning
5	Consumer Technical Assistance Program: Marketing, Education, and Outreach

ACRONYMS/GLOSSARY

Specific acronyms and terms used throughout this scope of work are defined as follows:

Acronym	Definition
CAM	Commission Agreement Manager
CBO	Community Based Organization
Contractor	Building Decarbonization Coalition
CEC	California Energy Commission
HEEHRA	High-Efficiency Electric Home Rebate Program
HPP	“California Heat Pump Public-Private Partnership” or “Heat Pump Partnership”
HOMES	Homeowner Managing Energy Savings Program
IRA	Inflation Reduction Act
MAB	Market Advisory Board
MEO	Marketing, Education, and Outreach
OEM	Original Equipment Manufacturers
PAB	Policy Advisory Board

BACKGROUND/PROBLEM STATEMENT

In 2022, Governor Newsom outlined new targets to accelerate progress on the state’s 2030 climate goals to achieve carbon neutrality no later than 2045. As part of that call for bold actions, Governor Newsom established a target of 6 million heat pumps by 2030. The California Heat Pump Public-Private Partnership (HPP) will be key to supporting this goal. The HPP will build upon the commitments made by heat pump manufacturers at the October 10, 2023, Building Electrification Summit sponsored by the California Energy Commission (CEC) and the Electric Power Research Institute (EPRI), and facilitate translating those commitments into tangible actions.

Further, the HPP will work to address barriers to accelerate heat pump market adoption including barriers relating to technical, market, and regulatory issues. Consistent with direction from [Assembly Bill 102](#) (Chapter 38, Statutes of 2023), the HPP will be tasked with, among other duties, creating a public awareness campaign and implementing a comprehensive consumer technical assistance program to assist Californians in understanding and leveraging federal Inflation Reduction Act (IRA) incentives and tax credits to decarbonize their homes. A total of \$9 million is authorized and available to support consumer technical assistance through Assembly Bill 102. The HPP is a key initiative that will be funded by this budget.

GOALS AND OBJECTIVES OF THIS AGREEMENT

The goal of this Agreement is to manage a public-private partnership dedicated to achieving the Governor’s goal of installing 6 million heat pumps by 2030.

Exhibit A

SCOPE OF WORK

This goal will be achieved by completing the following objectives:

1. Establish a public-private partnership between state agencies, Original Equipment Manufacturers (OEM), energy providers, distributors, retailers, and other stakeholders.
2. Implement a consumer technical assistance program including marketing, education, and outreach (MEO) strategies that increases awareness and favorability of heat pumps and building electrification generally among homeowners, renters, and contractors and helps consumers understand and leverage available financial incentives including rebates, incentives, tax credits, and financing.
3. Develop a Blueprint to inform and prioritize the HPP activities.
4. Facilitate the resolution of heat pump adoption barriers, including market, policy, regulatory, and technical barriers.

FORMAT/REPORTING REQUIREMENTS

Deliverables/Reports

When creating reports, the Contractor shall use and follow, unless otherwise instructed in writing by the Commission Agreement Manager (CAM), the latest version of the Consultant Reports Style Manual published on the CEC's website:

http://www.energy.ca.gov/contracts/consultant_reports/index.html

Each final deliverable shall be delivered as one original, reproducible, 8 ½" by 11", camera-ready master in black ink. Illustrations and graphs shall be sized to fit an 8 ½" by 11" page and readable if printed in black and white.

Electronic File Format

The Contractor shall deliver an electronic copy (CD ROM or memory stick or as otherwise specified by the CAM) of the full text in a compatible version of Microsoft Word (.doc).

The following describes the accepted formats of electronic data and documents provided to the CEC as contract deliverables and establishes the computer platforms, operating systems, and software versions that will be required to review and approve all software deliverables.

- Data sets shall be in Microsoft (MS) Access or MS Excel file format.
- PC-based text documents shall be in MS Word file format.
- Documents intended for public distribution shall be in PDF file format, with the native file format provided as well.
- Project management documents shall be in MS Project file format.

Software Application Development

If this scope of work includes any software application development, including but not limited to databases, websites, models, or modeling tools, the Contractor shall utilize the following standard Application Architecture components in compatible versions:

- Microsoft ASP.NET framework version 4.6 or above
- Microsoft ASP.NET MVC 5.0 or above
- Microsoft ASP.Net Core 6.0 or above
- Microsoft Entity Framework 6.0 or above
- Microsoft Internet Information Services IIS 10.0 or above

Exhibit A

SCOPE OF WORK

- Microsoft SQL Server 2016 or above
- Microsoft SQL Reporting Services 2016 or above
- Visual Studio.NET 2019 or above
- Python, C# Programming Language with layered architectures (Presentation, Business logic, Data Access)
- MSSQL (Structured Query Language)
- Bootstrap 5.0 or above
- XML and JSON
- Telerik, Redgate, and Postman
- AWS, Snowflake and Salesforce

Any exceptions to the Software Application Development requirements above must be approved in writing by the CEC Information Technology Services Branch.

TASK 1 AGREEMENT MANAGEMENT

Subtask 1.1 Kick-off Meeting

The goal of this task is to establish the lines of communication and procedures for implementing this Agreement.

The Contractor shall

- Attend a “kick-off” meeting with the CAM, the Commission Agreement Officer (CAO), and a representative of the Accounting Office. The meeting will be held virtually at the discretion of the CAM and the Contractor. The Contractor shall include their Project Manager, Contracts Administrator, Accounting Officer, and others designated by the CAM in this meeting. The administrative and technical aspects of this Agreement will be discussed at the meeting.
- If necessary, prepare an updated Schedule of Deliverables based on the decisions made in the kick-off meeting.

The CAM shall

- Arrange the virtual meeting via MS Teams including scheduling the date and time.
- Provide an agenda to all potential meeting participants prior to the kick-off meeting.

Deliverables

- Updated Schedule of Deliverables, if applicable

Subtask 1.2 Invoices

The Contractor shall

- Prepare Invoices for all reimbursable expenses incurred performing work under this Agreement in compliance with the Exhibit B of the Terms and Conditions of this Agreement. Invoices shall be submitted with the same frequency as Progress Reports (task 1.4). Invoices must be submitted to the CEC’s Accounting Office.

Deliverables

- Monthly Invoices

Exhibit A

SCOPE OF WORK

Subtask 1.3 Manage Subcontractors

The goal of this task is to ensure quality products, to enforce subcontractor Agreement provisions, and in the event of failure of the subcontractor to satisfactorily perform services, recommend solution to resolve the problem.

The Contractor shall

- Manage and coordinate subcontractor activities. The Contractor is responsible for the quality of all subcontractor work and the CEC will assign all work to the Contractor. If the Contractor decides to add new subcontractors, they shall (1) comply with the Terms and Conditions of this Agreement, and (2) notify the CAM who will follow the CEC's process for adding or replacing subcontractors.

Subtask 1.4 Progress Reports

The goal of this task is to periodically verify that satisfactory and continued progress is made towards achieving the objectives of this Agreement.

The Contractor shall

- Prepare Progress Reports which summarize all Agreement activities conducted by the Contractor for the reporting period, including an assessment of the ability to complete this Agreement within the current budget and any anticipated cost overruns. Each progress Report is due monthly with the Monthly Invoice. The CAM will provide the format for the Progress Reports and will include, but not be limited to, progress towards meeting program goals and status of expenditures relative to budget and expected deliverables.

Deliverables

- Monthly Progress Reports (submitted with Monthly Invoices)

Subtask 1.5 Final Report

The goal of this task is to prepare a comprehensive written Final Report that describes the original purpose, approach, results, and conclusions of the work completed under this Agreement. The Final Report shall be prepared in language easily understood by the public or layperson with a limited technical background.

The Final Report must be completed before the termination date of this Agreement in accordance with Exhibit A-1 Schedule of Deliverables.

The Final Report shall be a public document. If the Contractor has obtained confidential status from the CEC and will be preparing both a public and a confidential version of the Final Report, the Contractor shall perform the following subtasks for both the public and confidential versions of the Final Report.

The Contractor shall

- Prepare and submit *Draft Outline of the Final Report* for review and approval. The CAM will provide written comments to the Contractor on the draft outline. The Contractor shall review the comments and discuss any issues with the recommended changes with the CAM.
- Prepare and submit the *Final Outline of the Final Report*, incorporating CAM comments.
- Prepare the *Draft Final Report* for this Agreement in accordance with the approved outline.

Exhibit A

SCOPE OF WORK

- Submit the *Draft Final Report* for review and comment. The CAM will provide written comments to the Contractor. The Contractor shall review the comments and discuss any issues with the recommended changes with the CAM.
- Prepare and submit the *Final Report*, incorporating CAM comments.

Deliverables

- Outline of the Final Report (Draft and Final)
- Final Report (Draft and Final)

Subtask 1.6 Final Meeting

The goal of this task is to discuss closeout of this Agreement and review the project.

The Contractor shall

- Meet with CEC staff prior to the term end date of this Agreement. The meeting will be held virtually via MS Teams, as agreed upon by CAM and the Contractor. This meeting will be attended by the Contractor Project Manager and the CAM. The CAM will determine any additional appropriate meeting participants. The administrative and technical aspects of Agreement closeout will be discussed at the meeting.
- Present findings, conclusions, and recommended next steps (if any) for this Agreement, based on the information included in the Final Report.
- Prepare a written document of meeting agreements and unresolved activities.
- Prepare a schedule for completing the closeout activities for this Agreement, based on determinations made within the meeting.

Deliverables

- Written documentation of meeting agreements
- Schedule for completing closeout activities

TECHNICAL TASKS

TASK 2 PLANNING AND LAUNCH

The goal of this task is to produce the documents and resources needed to implement the California Heat Pump Public-Private Partnership.

The Contractor shall

- Develop the HPP *Governing Documents*, including but not limited to, the HPP Charter that articulates the purpose of the HPP, roles and responsibilities of each party, organizational structure, and reporting and governance structure. The governance structure is expected to include a Policy Advisory Board (PAB) composed of California public entities, a Market Advisory Board (MAB) composed of manufacturers, distributors, retailers, utilities, and other entities, and a Technical Committee to address specific policy and technical issues as needed.

Exhibit A SCOPE OF WORK

- Develop contractual agreements necessary for the establishment and operation of the HPP. The agreements will be created under the advice of expert legal counsel and in close coordination with the CEC. At minimum, this shall include a *Standard Partnership Agreement* laying out the terms and conditions for the HPP. These shall include, but not be limited to:
 - Eligibility requirements for organizations
 - Minimum contribution requirements (cash, in-kind, etc.), if applicable
 - Indemnification language
 - Allowable public messaging about HPP and uses of organization name and logos
- Create *Marketing Materials* explaining what the HPP is, what organizations are eligible to join, and what is expected of organizations that join. The Marketing Materials shall include, but not be limited to:
 - Written summary
 - Fact sheet
 - Presentation
- Create the *HPP Website*, including separate portals for the PAB, the MAB, Technical Committee, and partners. The website may service the general public as well, but that will be decided through the strategic planning process. On an ongoing basis, continue to build out a website for the purpose of creating an effective communication portal for HPP governance communications as well as other types of information.

Deliverables

- HPP Governing Documents (Draft and Final)
- Standard Partnership Agreement (Draft and Final)
- HPP Marketing Materials (Draft and Final)
- HPP Website

TASK 3 PARTNER MANAGEMENT AND CONVENING

The goal of this task is to establish and manage a public-private partnership that works collaboratively to carry out the HPP Charter.

Subtask 3.1 Partner Recruitment

The goal of this task is to recruit private and public sector stakeholders that collectively participate in and contribute to the implementation of the California Heat Pump Public-Private Partnership.

The Contractor shall

- Create a *List of Organizations* that are eligible to join the HPP. Representation is expected to include OEMs, supply chain actors, energy providers, and other relevant state and federal agencies. A draft will be shared with the CEC for feedback. The List of Organizations is only a starting point for partner recruitments. An organization can join the HPP even if it is not included in the initial List of Organizations.
- Recruit organizations to join the HPP, securing a *Signed Partnership Agreement* from each organization that wishes to become a HPP partner.

Exhibit A

SCOPE OF WORK

- Recruit personnel from HPP partner organizations to serve on the PAB, the MAB, and Technical Committee. Everyone who is on one of the advisory boards shall be named on the HPP Website.

Deliverables

- List of Organizations
- Signed Partnership Agreements

Subtask 3.2 Advisory Board Meetings

The goal of this task is to facilitate a cadence of meetings with the PAB, the MAB, and partners that allow for efficient dissemination of information and shared focus on priority topics.

The Contractor shall

- Establish a schedule and approach to meeting regularly with the PAB, the MAB, and partners.
- Develop *Meeting Agendas*. A draft shall be submitted to members of the PAB and the MAB for feedback.
- Prepare *Meeting Materials* (memoranda, presentations, etc.) and secure speakers as appropriate.
- Hold three *In-person Meetings* per year of the PAB and the MAB. The dates for these meetings will be set at the start of the year.
- Circulate *Meeting Notes* to the PAB and the MAB members.

Deliverables

- Meeting Agendas (Draft and Final)
- Meeting Materials
- In-person Meetings
- Meeting Notes

TASK 4 STRATEGIC PLANNING

The goal of this task is to (1) develop a *Blueprint* for achieving the HPP Charter's and state's heat pump installation goal and (2) an *Operational Plan* that ensures efficient management of the HPP. All elements of the Operational Plan will be developed in close collaboration with the PAB and the MAB. The Operational Plan shall identify the highest priority opportunities that will accelerate market adoption of heat pumps and support the resolution of issues that will ensure a strong long-term trajectory of market adoption.

Subtask 4.1 Blueprint Development

The goal of this task is to develop a *Blueprint* for achieving the HPP Charter and state's heat pump installation goal. The Blueprint will serve as an action plan for addressing key policy and market barriers.

The Contractor shall

- Interview several stakeholders that bring unique perspectives and expertise relating to electrification.

Exhibit A

SCOPE OF WORK

- Identify the policy and market barriers inhibiting the state from achieving its heat pump installation goals. This includes identifying the agencies and proceeding numbers where policy barriers are best addressed, research needs, gaps in understanding, and existing channels for information, education, and training. Barriers may pertain to, without limitation:
 - Supply chain and suppliers
 - Manufacturing
 - Materials, including refrigerants
 - Workforce and labor
 - Consumer awareness
 - Technical and operational
 - Codes, regulatory, policies
 - Load flexibility capabilities
 - Data
- Create a *Blueprint* (draft and final) for achieving California’s goal of installing 6 million heat pumps by 2030. A draft of the *Blueprint* (as described in Subtask 4.2) will be shared with the CEC and other members of the PAB and the MAB for feedback before preparation of the final. Included in the *Blueprint* (draft and final) will be an action plan for addressing priority issues identified.
- Develop process for annual refresh to the *Blueprint* based upon market progress and lessons learned. Changes will be proposed to the PAB and the MAB.
- Manage and track the HPP’s progress in addressing key policy and market barriers, documenting progress towards resolution, including actions led by others.

Deliverables

- *Blueprint* (Draft and Final)

Subtask 4.2 Operational Plan

The goal of this task is to develop an *Operational Plan* that ensures efficient management of the HPP.

The Contractor shall

- Determine knowledge and skill sets necessary and number of people needed to fully implement the HPP and develop hiring plan, to meet needs. At a minimum, roles will include advisory board and membership management resources, program management, financial management, communications, and technical expertise.
- Determine other resources that may be needed to implement the HPP.
- Develop budget plans for a minimum of three years with appropriate financial controls to ensure that spending is on track with expected outcomes. Manage, track, and report on progress of goals relative to budget quarterly.
- Establish clear roles and responsibilities with respect to administrative leadership, including, but not limited to, Board communications and coordination and member communications and coordination.

Exhibit A

SCOPE OF WORK

- Create an *Operational Plan* for managing the HPP. A draft of the Operational Plan will be shared with the CEC and other members of the PAB and the MAB for feedback. The feedback will be incorporated into a final Operational Plan.
- Develop process for annual refresh to the Operational Plan based upon market progress and lessons learned. Changes will be proposed to the PAB and the MAB.

Deliverables

- Operational Plan (Draft and Final)

TASK 5 CONSUMER TECHNICAL ASSISTANCE PROGRAM: MARKETING, EDUCATION AND OUTREACH

The goal of this task is to increase awareness and favorability for building electrification among California homeowners, renters, and contractors. The HPP will implement the consumer education and technical assistance program called for in AB 102, which will aim to ease participation and access to financing opportunities and state incentive funds including but not limited to the Equitable Building Decarbonization Program as well as federal incentives from the Inflation Reduction Act for the Homeowner Managing Energy Savings (HOMES) and High-Efficiency Electric Home Rebate (HEEHRA) programs, and related federal tax credits, including the Energy Efficient Home Improvement Credit and Residential Clean Energy Credit.

Subtask 5.1 Digital Infrastructure

The goal of this task is to provide the most reliable source of information about home electrification in California.

The Contractor shall

- Create and manage a comprehensive website with information and resources to support the home electrification industry. This includes, but is not limited to:
 - Searchable directory of home electrification service providers
 - Searchable database of home electrification rebates and incentives
 - Information about technologies
 - Stories about home electrification
- Manage social media accounts, including but not limited to Facebook, Instagram, and YouTube.
- Refine the user experience, using website analytics, interviews, and other sources to inform refinements.

Subtask 5.2 Workforce Engagement

The goal of this task is to manage and grow a network of home electrification service providers that provide good customer service and quality workmanship. This may include, but is not limited to providing marketing resources and education on heat pump customer communications, technical issues, installation issues, permitting, and reporting.

The Contractor shall

- Implement marketing efforts that promote home electrification to contractors and individuals who could join the heat pump workforce.

Exhibit A

SCOPE OF WORK

- Recruit contractors to join the HPP. All contractors that join will have their credentials validated.
- Educate the service provider network about industry trends and the implications of policies that will be coming into effect.
- Implement operational, behavioral, and technological initiatives to facilitate continuous improvement and customer satisfaction.

Subtask 5.3 Consumer Marketing

The goal of this task is to implement marketing, education and outreach tactics that increase awareness and favorability for building electrification among California homeowners and renters.

The Contractor shall

- Implement email marketing campaigns to grow education and nurture the customers through their decarbonization journey.
- Facilitate earned media to showcase the growth of the heat pump market and tell stories about people who are happy they have installed a heat pump.
- Develop a network of trusted messengers who promote heat pumps to their community. These individuals may include, but are not limited to homeowners, renters, professional chefs, realtors, contractors, community-based organizations (CBO), and other stakeholders that influence customer choice.
- Implement a robust program of in-person events across the state.
- Implement paid media flights using creative that promotes heat pumps.

Subtask 5.4 Partner Integration

The goal of this task is to work with HPP partners to implement MEO tactics that increase awareness and favorability for building electrification among California homeowners, renters, and contractors.

The Contractor shall

- Meet regularly with HPP partners to identify ways that partners can support the HPP MEO efforts.
- Coordinate implementation of and refinement to the HPP's MEO activities.
- Track partners activities and performance and support continuous improvement.

Subtask 5.5 Data Tracking and Reporting

The goals of this task are to (1) track and report progress toward the HPP goal and (2) report on the activities, successes, and lessons learned from implementing the HPP consumer technical assistance and MEO programs.

The Contractor shall

- Develop and implement a methodology to comprehensively track heat pump sales in California.

Exhibit A

SCOPE OF WORK

- Produce and distribute *Quarterly Reports* to the PAB, the MAB, and membership. Reports will highlight successes, challenges, lessons learned, and issues that are emerging for the PAB, the MAB, and membership to be aware of. The reports will include, but are not limited to the following topics:
 - Heat pump sales
 - Workforce education activities
 - Website updates
 - Paid and earned media performance
 - Events
 - HPP partner activities

Deliverables

- Quarterly Reports to PAB, MAB, and Membership