



**CALIFORNIA
ENERGY COMMISSION**



**California Energy Commission
March 13, 2024 Business Meeting
Backup Materials for California Employment Training Panel**

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

[PROPOSED]

RESOLUTION NO: 24-0313-11

STATE OF CALIFORNIA

**STATE ENERGY RESOURCES
CONSERVATION AND DEVELOPMENT COMMISSION**

RESOLUTION: California Employment Training Panel

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 600-23-007 for a \$3,000,000 contract to provide training and certification of electricians as part of the Electric Vehicle Infrastructure Training Program (EVITP). The purpose of the agreement is to increase the number of EVITP certified electricians available to meet the growing demand for electric vehicle charging infrastructure; 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 March 13, 2024.

AYE:

NAY:

ABSENT:

ABSTAIN:

Dated:

Kristine Banaag
Secretariat



CONTRACT REQUEST FORM (CRF)

A. New Agreement Number

New Agreement Number: 600-23-007

B. Division Information

1. Division Name: Fuels and Transportation Division
2. Agreement Manager: Jana McKinny
3. MS-27
4. Phone Number: 916-827-8326

C. Contractor's Information

1. Contractor's Legal Name: California Employment Training Panel
2. Federal ID Number: 94-6001347

D. Title of Project

Title of project: Electric Vehicle Infrastructure Training Program Training and Certification Project

E. Term and Amount

1. Start Date: 03-13-2024
2. End Date: 07-30-2027
3. Amount: \$3,000,000

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: 03-13-2024
4. Consent or Discussion? Discussion
5. Business Meeting Presenter Name: Jana McKinny
6. Time Needed for Business Meeting: 5 minutes
7. The email subscription topic is: Clean Transportation Program

Agenda Item Subject and Description:

California Employment Training Panel. Proposed resolution approving agreement 600-23-007 with the California Employment Training Panel for a \$3,000,000 contract to provide training and certification of electricians as part of the Electric Vehicle Infrastructure Training Program (EVITP) and adopting staff's determination that this action is exempt from CEQA. The purpose of the agreement is to increase the number of EVITP certified electricians available to meet the growing demand for electric vehicle charging infrastructure. (Clean Transportation Program Funding) Contact: Jana McKinny (Staff Presentation: 5 minutes)

G. California Environmental Quality Act (CEQA) Compliance

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

Yes

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:

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

a) Agreement IS exempt?

Yes

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: None

CCR section number: None

Categorical Exemption?

Yes

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: 14 CCR Section 15306, 14 CCR Section 15322

Cal. Code Regs, tit. 14, §15306, Information Collection, provides that projects which consist of basic data collection, research and resource evaluation activities which do not result in a serious or major disturbance to an environmental resource are categorically exempt from the provisions of CEQA. This project consists of planning, outreach, and training in the electric vehicle charging infrastructure (EVCI) industry.

Cal. Code Regs, tit. 14, §15322 Training Programs Involving No Physical Changes, provides that projects which consist of the development of or changes in curriculum or training methods which do not result in a serious or major disturbance to an environmental resource are categorically exempt from the provisions of CEQA. This project involves the development of curriculum and training programs. The project will not cause direct physical changes to the environment, and there will be no physical construction.

Therefore, the proposed project will have no significant effect on the environment and is categorically exempt under sections 15306 and 15322.

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.

Not applicable None

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
Subcontractors To Be Determined	\$ 2,700,000

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
ARFVTF	2021-22	601.118N	\$1,422,500
ARFVTF	2022-23	601.118O	\$1,577,500

TOTAL Amount: \$3,000,000

R&D Program Area: N/A

Explanation for "Other" selection N/A

Reimbursement Contract #: N/A

Federal Agreement #: N/A



K. Contractor's Contact Information

1. Contractor's Administrator/Officer

Name: Jill McAlton
Address: 1100 J Street
City, State, Zip: Sacramento, CA 95814
Phone: 916-327-5461
E-Mail: Jill.Mcaltoon@etp.ca.gov

2. Contractor's Project Manager

Name: Robert Meyer
Address: 1100 J Street
City, State, Zip: Sacramento, CA 95814
Phone: 916-327-4391
E-Mail: Robert.Meyer@etp.ca.gov

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	Interagency Exemption

M. Contractor Entity Type

Contractor Entity Type	Yes or No?
Private Company (<i>including non-profits</i>)	No
CA State Agency (<i>including UC and CSU</i>)	Yes
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: N/A



O. Civil Service Considerations

- a. Not Applicable (Agreement is with a CA State Entity or a membership/co-sponsorship)? Yes
- b. Public Resources Code 25620, et seq., authorizes the Commission to contract for the subject work. (PIER) N/A
- c. The Services Contracted: N/A.

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: N/A.

- 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?

N/A.

Justification:

This is an interagency agreement.

P. Payment Method

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

N/A.

Q. Retention

Is Agreement subject to retention? No.

If Yes, Will retention be released prior to Agreement termination? N/A.

R. Justification of Rates

Rates are based on salary ranges for the State of California.

S. Disabled Veteran Business Enterprise Program (DVBE)

Provide requested additional information.

1. Exempt (Interagency/Other Government Entity) Yes.
2. Meets DVBE Requirements DVBE No.
Amount: \$ 0 DVBE %:0
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".

Not Applicable



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

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.

Quarterly

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

Yes. The timeframe ensures the contractor is able to receive data from all subcontractors and provide it to the CEC in the final report.

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	No
5	Awardee CEQA Documentation	Yes
6	Resumes	No
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: Jana McKinny

Approval Date: 12/29/2023

Office Manager: Charles Smith

Approval Date: 12/29/2023

Deputy Director: Jennifer Kalafut

Approval Date: January 4, 2024

Exhibit A

SCOPE OF WORK

TASK LIST

Task #	Task Name
1	Agreement Management
2	Development, Outreach, and Marketing
3	Contract Administration and Training
4	Data Collection and Analysis

ACRONYMS/GLOSSARY

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

Acronym	Definition
CAM	Commission Agreement Manager
CEC	California Energy Commission
CSLB	Contractor State Licensing Board
CTP	Clean Transportation Program
ETP	Employment Training Panel
EV	Electric Vehicle
EVCI	Electric Vehicle Charging Infrastructure
EVITP	Electric Vehicle Infrastructure Training Program
PEV	Plug-in Electric Vehicle
LWDA	Labor and Workforce Development Agency
PEV	Plug-in Electric Vehicle

BACKGROUND

Assembly Bill (AB) 118 (Núñez, Chapter 750, Statutes of 2007), created the Clean Transportation Program. The statute authorizes the CEC to develop and deploy alternative and renewable fuels and advanced transportation technologies to help attain the state's climate change and clean air goals. AB 126 (Reyes, Chapter 319, Statutes of 2023) reauthorized the funding program through July 1, 2035 and focused the program on zero-emission transportation.

The Clean Transportation Program (CTP) has an annual budget of approximately \$100 million and provides financial support for projects that:

- Develop and deploy zero-emission technology and fuels in the marketplace where feasible and near-zero-emission technology and fuels elsewhere.
- Produce alternative and renewable low-carbon fuels in California.

- Deploy zero-emission fuel infrastructure, fueling stations, and equipment where feasible and near-zero-emission fuel infrastructure, fueling stations, and equipment elsewhere.
- Establish workforce training programs and conduct public outreach on the benefits of alternative transportation fuels and vehicle technologies.

Through its Clean Transportation Program, the CEC seeks to ensure the availability of adequate charging infrastructure to support the state's growing stock of plug-in electric vehicles (PEVs). For instance, Assembly Bill 2127 (Ting, Chapter 365, Statutes of 2018) requires the CEC to prepare a statewide assessment of the charging infrastructure needed to achieve the goal of 5 million ZEVs on the road by 2030 and reduce emissions of greenhouse gases to 40 percent below 1990 levels by 2030. Executive Order N-79-20 subsequently set targets for the state to move to 100 percent zero-emission technologies in the transportation sector and directed the CEC to expand the Assembly Bill 2127 assessment by considering the levels of PEV adoption required by the executive order.

Assembly Bill (AB) 841 (Ting, Chapter 372, Statutes of 2020) set new requirements for electric vehicle charging infrastructure (EVCI) and equipment located on the customer side of the electric meter that is funded or authorized, in whole or in part, by state entities. This applies to funding from the CTP. With limited exceptions, the law requires EVCI and associated equipment to be installed by a contractor with the appropriate license classification, as determined by the Contractors' State License Board (CSLB). AB 841 applies to all EVCI projects that install charging ports supplying 25 kilowatts or more to a vehicle. At any given time, 25 percent of the total electricians, or at least one electrician, working on the crew for the project must hold Electric Vehicle Infrastructure Training Program (EVITP) certification. (California Public Utilities Code Section 740.20)

The Employment Training Panel (ETP) is a department under the California Labor and Workforce Development Agency (LWDA), which oversees the state's comprehensive workforce investment system. ETP provides funding to employers for job skills training necessary to remain competitive. ETP was created in 1982 by the California State Legislature and is funded by California employers through a special payroll tax. ETP has a tripartite governing structure, with appointed Panel members representing businesses, unions, and state government. The ETP is a funding agency, not a training agency. Businesses determine their own training needs and how to provide training.

The California Unemployment Insurance Code section 10205(c)(4) empowers ETP to enter into fixed-fee performance contracts through a non-competitively bid process. ETP's core program provides funding reimbursement using a fixed-fee, reimbursement rate. Fixed-fee rates are \$23 per training hour for interactive training including classroom/laboratory/interactive e-learning, and \$9 per training hour for non-interactive, computer-based training. For the purposes of this Interagency Agreement, ETP (Contractor) will reimburse ETP contractors (Subcontractors) for actual training hours delivered to eligible trainees. Subcontractors earn funds from ETP only after a trainee completes training, and a subsequent post-training employment retention period is completed related employment.

GOAL OF THE AGREEMENT

The goal of this agreement is to increase the number of EVITP-certified electricians within California.

OBJECTIVES OF THE AGREEMENT

The objectives of this agreement are to:

- Train and certify a minimum of 3,000 EVITP electricians.
- Establish ongoing partnerships that include but are not limited to EVITP, the CSLB, electrical apprenticeship programs, electrical employers, electric vehicle (EV) charger companies, community colleges, and other stakeholders needed to achieve the training goal.
- Market the training program to all areas of the state including rural and non-urban areas.
- Market the training program to disadvantaged and low-income communities (DACs/LICs) and to diverse electricians and employers.
- Ensure that a minimum of 50 percent of the funds are invested in employers located in DACs/LICs.
- Collect data and analyze results during and after each subcontract.

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 Energy Commission'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 Energy Commission 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, 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
- 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 Energy Commission Information Technology Services Branch.

ADMINISTRATIVE TASKS

TASK 1- AGREEMENT MANAGEMENT

Task 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 Contracts Officer, and a representative of the Accounting Office. The meeting will be held online via Web-Ex or teleconference. 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.
- Prepare a sample of the subcontractor summaries that will be used by a CAM in determining when to approve an advance payment. The subcontractor summary shall include, at minimum, the amount of funding proposed for the subcontract, a description of the subcontractor, the number of participating employers, and the target number of electricians to be trained.

The CAM shall:

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

Deliverables:

- An updated Schedule of Deliverables (if applicable)
- Sample of subcontractor summary

Task 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 the Agreement. Invoices must be submitted to the Energy Commission’s Accounting Office.

Deliverables:

- Invoices

Task 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 Energy Commission 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 the Agreement, and 2) notify the CAM who will follow the Energy Commission's process for adding or replacing subcontractors.

Task 1.4 Quarterly Progress Reports

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

The Contractor shall:

- Prepare quarterly progress reports due within 15 calendar days after the end of the reporting period that summarize all Agreement activities conducted by the Contractor for the reporting period, including but not limited to:
 - An assessment of the ability to complete the Agreement within the current budget.
 - Any anticipated cost overruns.
 - Status of CEC referrals.
 - Number of and value of subcontracts in development, approved, active, and completed.
 - Copies of subcontracts executed during the reporting period.
 - Subcontractor monitoring summary including number of startup, monitoring, and final visits.
 - Summary of expenditures by subcontractor (encumbered and disbursed).
 - Summary of administrative costs (encumbered and disbursed).
 - Participant data, including number of trainees currently enrolled in EVITP training, completed training, EVITP certified as reported by subcontractor.

The CAM Shall:

- Provide the format for the progress reports.

Deliverables:

- Quarterly Progress Reports

Task 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 the Agreement in accordance with the Schedule of Deliverables.

The Final Report shall be a public document. If the Contractor has obtained confidential status from the Energy Commission 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.

Task 1.5.1 Final Report Outline

The Contractor shall:

- Prepare and submit a 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.

Deliverables:

- Draft Final Report Outline
- Final Report Outline

Task 1.5.2 Final Report

The Contractor shall:

- Prepare the draft Final Report for this Agreement in accordance with the approved Final Report Outline.
- 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:

- Draft Final Report
- Final Report

Task 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 Energy Commission staff prior to the term end date of this Agreement. The meeting will be held online via Web-Ex or teleconference. 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 the 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 2.0 Planning, Development, and Outreach

Task 2.1 Subcontractor Eligibility

The goal of this task is to develop subcontractor training guidelines and a subcontract template.

The Contractor shall:

- Contractor will consult with the CAM to develop *Subcontractor Eligibility Guidelines* to direct the selection of subcontractors to deliver EVITP training.
- Develop a *Subcontract Template* based upon the standard ETP contract that shall include, at a minimum:
 - A description of the subcontractor, participating employers, training to be delivered, training delivery method, and funds requested.
 - Performance-based criteria, including post-training employment retention requirements, that must be met in order for subcontractor to receive funding.
 - The subcontract budget amount, payment terms and appropriate provisions to secure adequate backup documentation to verify all subcontractor services for payment.

Deliverables:

- Subcontractor Eligibility Guidelines approved by CAM and Contractor.
- Subcontract Template approved by the Contractor.

Task 2.2 Outreach and Marketing

The goal of this task is to conduct outreach to electricians, electrical contractors, and stakeholders associated with electricians for the purpose of entering into subcontracts to conduct EVITP training and certification.

The Contractor shall:

- Develop an *EVITP Outreach and Marketing Plan* to identify subcontractors eligible to conduct training. The EVITP Outreach and Marketing Plan should, at a minimum:
 - Describe how the Contractor intends to increase awareness and encourage application for training contracts.
 - Ensure a minimum of 50 percent of subcontractor training investments contract-wide occur in rural, non-urban, and DACs/LICs.
- Report on the status of outreach and marketing in the Quarterly Progress Reports that shall include, but is not limited to, the following:
 - Documentation of all outreach efforts related to the EVITP.
 - The number, type, location (County and City), and mission of the employers and organizations contacted.
 - The number of meetings and presentations to be delivered with event name, location, audience description and audience size.

Deliverables:

- EVITP Outreach and Marketing Plan
- Report on the status of outreach and marketing (to be included in the Quarterly Progress Reports [Task 1.4]).

Task 3.0 Contract Administration

The goals of this task are to enter into subcontracts, provide contract administration, and have subcontractors conduct training.

The Contractor shall:

- Utilize the ETP-approved subcontractor eligibility guidelines to determine if a company/employer is eligible to receive funding.
- Develop, execute, and administer subcontracts that lead to EVITP training and certification.
- Submit a *Subcontractor Summary* for each proposed subcontractor to the CAM for review and approval. The CAM shall review the subcontractor summary to ensure the training project is consistent with the priorities established by the CEC and the terms of this Agreement. The subcontractor summary shall include, at minimum, the amount of funding proposed for the subcontract, a description of

the subcontractor, the number of participating employers, and the target number of electricians to be trained.

- Upon subcontractor approval from CAM, ETP will submit an invoice to the CEC to transfer funds from the CEC to the Contractor for the full value of the approved subcontract.
- Disburse CEC funds through subcontracts with eligible employers and partners.
- Ensure that subcontractors shall earn funds and receive payment directly from the Contractor on a reimbursement basis in arrears based on performance criteria.
- Notify the CAM of any funds obligated to but unearned by subcontractors by the termination of each subcontract. The Contractor shall encumber all unearned funds into subsequent CEC subcontracts approved by the CAM, or otherwise return funds to the CEC upon termination of this contract.
- Administer all subcontracts funded under this contract in accordance with the Contractor's core program that includes, but is not limited to:
 - Conduct start-up meetings - Prior to the beginning of training, the Contractor will conduct a start-up meeting with each subcontractor. This meeting may be conducted in a group setting to accommodate multiple subcontractor approvals. This meeting brings together the Contractor's signatory and/or Project Monitor, and the individual(s) responsible for the delivery and administration of the training program. The start-up meeting will consist of the following activities:
 - Review the terms of the subcontract.
 - Provide an overview of the subcontract monitoring and payment process.
 - Discuss recordkeeping and administration requirements.
 - Conduct monitoring visits – Monitoring visits will be conducted beginning 30 days after training begins with subsequent visits every five to six months or sooner to review the training schedule and the validation of invoices. Additional monitoring may be provided if technical assistance is required. Monitoring meetings will include any or all of the following:
 - Review the number of trainees that have begun training, are in training, have completed training, are in the employment retention period, or have completed the employment retention period.
 - Review the training schedule.
 - Review the curricula.
 - Observe training in session.
 - Interview trainers and trainees.
 - Review recordkeeping and daily documentation of training.

- Validate invoices.
- Provide technical assistance to ensure that the subcontractor remains in compliance with the subcontract terms and intent. If a subcontractor is out of compliance, the Contractor shall recommend corrective action to get them back in compliance and document corrective action in the monitoring report.
- Review training records to ensure that funds are only earned for those trainees who successfully complete training, are placed in a job and retain that job for the period of time specified in the subcontract.
- Document all subcontractor monitoring visits, technical assistance, and corrective action in a monitoring report. The monitoring report will cover all areas reviewed, performance data, compliance issues, and recommended corrective actions.
- Compile and submit to the CAM copies of all monitoring reports developed during the quarter and submit information in the Quarterly Progress Report.

Deliverables

- Subcontractor Summaries
- Subcontractor monitoring summary (to be included in the Quarterly Progress Reports [Task 1.4]).
- Summary of expenditures by subcontractor (to be included in the Quarterly Progress Reports [Task 1.4]).

Task 4.0 Data Collection and Analysis

The goal of this task is to collect and analyze data.

The Contractor shall:

- Collect data and information for all subcontracts that provide participant and program outcomes and results that includes, but is not limited to:
 - Status of CEC referrals.
 - Number of startup, monitoring, and final visits.
 - Summary of subcontracts awarded per quarter and cumulatively.
 - In development.
 - Approved per quarter and cumulatively.
 - That are active.
 - That are completed.
 - Status Funding Summary including:
 - Any anticipated cost overruns.

- Projects (Applications) in development
- Subcontracts awarded by quarter and cumulatively.
- Subcontract funds encumbered by quarter and cumulatively.
- Funds earned to subcontractors by quarter and cumulatively.
- Funds unearned and returned to the Contractor.
- Funds remaining available.
- Participant data, including:
 - For each subcontractor, the number of trainees:
 - Enrolled in EVITP training.
 - Completed training.
 - Certified by EVITP as reported by subcontractor.
 - Completed post-training employment retention period.
 - Placed into full-time employment (for new hire trainees only).
 - Based in DACs/LICs.
 - Number of incumbent employees trained, and number of new hires trained.
 - Address of the employer of the participating trainee (and whether the employer is located in DACs/LICs).
 - County of the employer of the participating trainee.
 - For each participating trainee in the program:
 - Hours of training completed.
 - Reported wages at enrollment.
 - Post-training reported wages.
 - Post-training EV charger installations completed by the EVITP-certified electricians funded through this project.
- Prepare draft final report and final report-based data collected under this task for review and approval by the CAM.

Deliverables

- Quarterly Progress Report in Task 1.4
- Draft Final Report in Task 1.5
- Final Report in Task 1.5

SCHEDULE OF DELIVERABLES AND DUE DATES

Task Number	Deliverable	Due Date
1.0		
1.1	<ul style="list-style-type: none"> An Updated Schedule of Deliverables (if applicable) Sample of subcontractor summary 	03/27/2024 03/27/2024
1.2	Invoices	Various, as specified in Exhibit B – Budget Provisions
1.4	Quarterly Progress Reports	Quarterly by the 10 th of the month following the quarter
1.5.1	<ul style="list-style-type: none"> Draft Final Report Outline Final Report Outline 	03/01/2027 03/15/2027
1.5.2	<ul style="list-style-type: none"> Draft Final Report Final Report 	04/12/2027 05/17/2027
1.6	<ul style="list-style-type: none"> Written documentation of meeting agreements Schedule for completing closeout activities 	05/31/2027
2.0		
2.1	<ul style="list-style-type: none"> Subcontractor Eligibility Guidelines approved by CAM and Contractor. Subcontract Template approved by the Contractor. 	02/28/2024 02/28/2024
2.2	<ul style="list-style-type: none"> Report on the status of outreach and marketing 	Quarterly by the 10 th of the month following the quarter
3.0	<ul style="list-style-type: none"> Summaries of proposed subcontracts Subcontractor monitoring reports Summary of expenditures by subcontractor 	As necessary Quarterly by the 10 th of the month following the quarter Quarterly by the 10 th of the month following the quarter
4.0	<ul style="list-style-type: none"> Quarterly Progress Report in Task 1.4 Draft Final Report in Task 1.5 Final Report in Task 1.5 	Quarterly by the 10 th of the month following the quarter 04/12/2027 05/17/2027