



**California Energy Commission
July 08, 2026 Business Meeting
Backup Materials for State Building and Construction Trades Council of
California**

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

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

CALIFORNIA ENERGY COMMISSION

PROPOSED RESOLUTION: State Building and Construction Trades Council of California

RESOLUTION NO: 26-0708-XX

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 FED-26-001 with the State Building and Construction Trades Council of California for a \$5,000,000 grant. The project will implement the California Residential Energy Advanced Technology Education (CREATE) initiative to train residential electricians, plumbers/pipefitters, and sheet metal workers to meet statewide electrification and energy-efficiency workforce needs. Funding will support 57 Joint Apprenticeship and Training Committees (JATCs) delivering residential-focused training aligned with California’s housing, greenhouse gas reduction, and clean energy goals; and

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

APPROVED AND ADOPTED this 08 day of July 2026, by the following vote:

AYE:

NAY:

ABSENT:

ABSTAIN:

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 approved and adopted by affirmative vote of the CEC at a meeting held on July 08, 2026.

Kim Todd
Secretariat



GRANT REQUEST FORM (GRF)

A. New Agreement Number

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

New Agreement Number: FED-26-001

B. Division Information

1. Division Name: Reliability, Renewable Energy, and Decarbonization Incentives (RREDI) Division
2. Agreement Manager: Amber Beck
3. MS: Not applicable
4. Phone Number: 279-226-1038

C. Recipient's Information

1. Recipient's Legal Name: State Building and Construction Trades Council of California

D. Title of Project

Title of project: CA-TREC Group 1: Pre-Apprenticeship and Apprenticeship

E. Term and Amount

1. Start Date: July 8, 2026
2. End Date: July 31, 2028
3. Amount: \$5,000,000

F. Business Meeting Information

1. Are the ARFVTP agreements \$75K and under delegated to Executive Director? Not applicable
2. The Proposed Business Meeting Date: July 8, 2026
3. Consent or Discussion? Discussion
4. Business Meeting Presenter Name: Amber Beck
5. Time Needed for Business Meeting: 5 minutes.
6. The email subscription topic is: Decarbonization Topics, Federal IRA Residential Incentives, Efficiency Topics

Project Description:

Proposed resolution approving agreement FED-26-001 with the State Building and Construction Trades Council of California for a \$5,000,000 grant . The project will implement the California Residential Energy Advanced Technology Education (CREATE) initiative to train residential electricians, plumbers/pipefitters, and sheet metal workers to meet statewide electrification and energy-efficiency workforce needs. Funding will support 57 Joint Apprenticeship and Training Committees (JATCs) delivering residential-focused training aligned with California's housing, greenhouse gas reduction, and clean energy goals.

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 funds will be used to deliver residential-focused training for electricians, plumbers/pipefitters, and sheet metal workers to meet statewide workforce needs.

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

a) Agreement **IS** exempt?

N/A

Statutory Exemption?

N/A

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: N/A

CCR section number: N/A

Categorical Exemption?

N/A

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: N/A

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

N/A

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

N/A

b) Agreement **IS NOT** exempt.

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

N/A

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	N/A
Negative Declaration	N/A
Mitigated Negative Declaration	N/A
Environmental Impact Report	N/A
Statement of Overriding Considerations	N/A
None	N/A

H. Is this project considered “Infrastructure”?

No



I. Subcontractors

List all Subcontractors listed in the Budget (s) (major and minor). 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	CEC Funds	Match Funds
Strategy Workplace Communications	\$449,829	\$449,829

J. Vendors and Sellers for Equipment and Materials/Miscellaneous

List all Vendors and Sellers listed in Budget(s) for Equipment and Materials/Miscellaneous. Insert additional rows if needed. If no vendors or sellers to report, enter “No vendors or sellers to report” and “0” to funds. **Delete** any unused rows from the table.

Vendor/Seller Legal Company Name	CEC Funds	Match Funds
California Statewide Joint Apprenticeship and Training Committee	\$592,506	\$592,506
California State Pipetrades Council	\$592,506	\$592,506
Western States Council of SMART	\$592,506	\$592,506

K. 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
Building Trades Councils

L. 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
Federal Funding	2024	501.105 IRA_TREC_LA 2024	\$9,289,757

TOTAL Amount: \$9,289,757

R&D Program Area: None

Explanation for “Other” selection not applicable

Reimbursement Contract #: not applicable



Federal Agreement #: SE0000756

M. Recipient's Contact Information

1. Recipient's Administrator/Officer

Name: Curtis Notsinneh
Address: 875-A Island Dr. #378
City, State, Zip: Alameda, CA 94502
Phone: (916)893-6269
E-Mail: curtis@strategy-workplace.com

2. Recipient's Project Manager

Name: Kathleen Barber
Address: 875-A Island Dr. #378
City, State, Zip: Alameda, CA 94502
Phone: (650) 773-2874
E-Mail: kathleen@strategy-workplace.com

N. Selection Process Used

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

Selection Process	Additional Information
Competitive Solicitation #	GFO-25-901
First Come First Served Solicitation #	Not applicable
Other	Not applicable

O. Attached Items

1. List all items that should be attached to this GRF 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	CEC 105, Questionnaire for Identifying Conflicts	Yes
4	Recipient Resolution	No
5	Awardee CEQA Documentation	Yes



STATE OF CALIFORNIA
CALIFORNIA ENERGY COMMISSION

Grant Request Form
CEC-270 (Revised 01/2026)

Approved By

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

Agreement Manager: Amber P. Beck

Approval Date: 4/30/2026

Office Manager: Savi Ellis-Pachori

Approval Date: 05/20/2026

Deputy Director: Deana Carrillo

Approval Date: 05/28/2026

Scope of Work
State Building and Construction Trades Council of California
California Residential Energy Advanced Technology Education
(CREATE)

I. TASK ACRONYM/TERM LISTS

A. Task List

Task #	Task Name
1	Agreement Administration
2	Project Tracking, Data Collection, and Reporting
3	Implement Training Program
4	Strategy Standardization

Acronym/Term List

Acronym/Term	Meaning
BTC	Building Trades Council
CAM	Commission Agreement Manager
CAO	Commission Agreement Officer
CA-TREC	California Training for Residential Energy Contractors
CEC	California Energy Commission
COP	Community of Practice Convenings
CPR	Critical Project Review
CREATE	California Residential Energy Advanced Technology Education
IBEW	International Brotherhood of Electrical Workers
JATC	Joint Apprenticeship Training Committee
MC3	National Building Trades Multi-Craft Core (MC3) curriculum
PLA	Project Labor Agreements
SBCTC	State Building and Construction Trades Council of California
Strategy	Strategy Workplace Communications

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UA	United Association of Journeymen and Apprentices of the Plumbing and Pipefitting Industry
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II. PURPOSE OF AGREEMENT, PROBLEM/SOLUTION STATEMENT, AND GOALS AND OBJECTIVES

A. Purpose of Agreement

The purpose of this Agreement is to fund the development of a well-trained California building and construction trades workforce capable of building, retrofitting, and servicing energy-efficient residential buildings across CA. This workforce of electricians, plumbers and pipefitters, and sheet metal workers will help contractors meet rising demand for high efficiency energy housing while creating strong, long-term career opportunities for workers within their communities.

B. Problem/ Solution Statement

Problem

California policy makers have set ambitious goals that, to be met by current timelines, will require a highly efficient skilled and trained construction workforce to build, retrofit, and service energy-efficient residential buildings. This gap in the workforce limits contractors' ability to meet growing demand for energy-efficiency construction and slows progress toward statewide goals.

California contractors and their Joint Apprenticeship Training Committees (JATCs) lack the resources needed to increase and speed up the development of a well-trained residential construction trades workforce to implement high-efficiency policies and programs. Historically, employers have prioritized non-residential projects due to higher returns, leaving critical residential work—including energy-efficiency projects—underserved and subject to the hiring of workers from the underground economy. Although contractors and JATCs are ready to expand into this sector and are grateful for new federal and state investment in this sector, the cost of developing new training programs and bringing on additional apprentices is prohibitively high. As a result, contractors struggle to meet the growing demand for energy-efficient residential projects, and communities lose out on strong career opportunities in these rapidly expanding fields.

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Solution

The proposed California Residential Energy Advanced Technology Education (CREATE) grant funding will establish a strategic workforce pipeline enabling California employers to expand access to highly skilled and trained trades workers in the residential energy-efficiency sector by securing funding to develop a larger, well-trained pool of electricians, sheet metal, and plumbing/pipefitting workers capable of constructing, retrofitting, and servicing high-performance, energy-efficient residential buildings.

The State Building and Construction Trades Council of California (SBCTC) is uniquely qualified and positioned to provide this solution because of its existing statewide workforce development program and the labor-management infrastructure its union JATCs possess with their contractor partners. CREATE will bring together residential construction employers, local Building Trades councils, union representatives for the International Brotherhood of Electrical Workers (IBEW), United Association of Journeymen and Apprentices of the Plumbing and Pipefitting Industry (UA), and Sheet Metal Workers, and those unions' JATCs that are responsible for delivering residential training programs. This collaboration is designed to give contractors and their JATCs the resources and network they need to expand the delivery of energy-efficiency residential projects.

Beyond meeting industry demand, this program will open doors to stable, high-quality career pathways for workers across California. The training and upskilling supported through this initiative will enable individuals to secure long-term employment with competitive wages and increasing economic mobility while advancing the state's environmental and energy-efficiency goals. The strength of the CREATE partnership represents a powerful opportunity to drive both workforce development and statewide sustainability priorities. CREATE will ensure that funds disbursed to JATCs directly cover the costs of energy-efficiency residential training needed to build a new well-trained workforce of electricians, plumbers and pipefitters, and sheet metal workers.

CREATE directly responds to California's growing demand for qualified trades workers equipped to deliver energy-efficient construction. By investing in this workforce, CREATE will enable contractors to reliably staff residential projects, accelerate the delivery of energy-efficiency upgrades, and support the state's transition toward cleaner, more sustainable housing.

C. Goals and Objectives of the Agreement

Agreement Goals

The goals of this Agreement are to:

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- Increase the number of qualified residential electricians, plumbers/pipefitters, and sheet metal workers so contractors can meet growing residential workforce needs.
- Expand the pool of skilled residential trades workers capable of helping contractors meet California’s energy-efficiency requirements and statewide goals.
- Support the development of healthier, more energy-efficient, and affordable housing for California residents.
- Strengthen local communities by creating high-quality career pathways and long-term economic opportunities for residents.

Agreement Objectives

The objectives of this Agreement are to:

- Convene contractors, Building Trades representatives, and JATC partners to explain the purpose of CREATE and outline participation opportunities and requirements, with all convenings organized around specific local communities.
- Recruit 57 JATCs to enroll in the CREATE initiative.
- Train 1,611 apprentices to construct, retrofit, and repair residential energy-efficiency systems and projects.
- Reimburse participating JATCs whose trainees meet CREATE’s goals at a rate of \$2,500 per trainee per semester of residential training.
- Survey all partners to assess whether contractors increased their bidding on and receipt of residential work.
- Develop a final report evaluating the feasibility of creating a statewide industry certification for contractors and workers focused on residential energy-efficiency activities. This report will translate lessons learned from CREATE into a cross-sector process involving employers, workers, manufacturers, and training providers to establish standards, quality benchmarks, and long-term workforce strategies that support the state’s growing residential energy sector.

III. AGREEMENT ADMINISTRATION

TASK 1: AGREEMENT ADMINISTRATION

Subtask 1.1 Products (Tranches 1 and 2)

The goal of this subtask is to establish the requirements for submitting project products (e.g., reports, summaries, plans, and presentation materials). Unless otherwise specified by the Commission Agreement Manager (CAM), the Recipient must deliver products as required below by the dates listed in Attachment 4 **Project Schedule**.

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All products submitted which will be viewed by the public, must comply with the accessibility requirements of Section 508 of the federal Rehabilitation Act of 1973, as amended (29 U.S.C. Sec. 794d), and regulations implementing that act as set forth in Part 1194 of Title 36 of the Federal Code of Regulations.

All technical tasks should include product(s). Products that require a draft version are indicated by marking “**(draft and final)**” after the product name in the “Products” section of the task/subtask. If “(draft and final)” does not appear after the product name, only a final version of the product is required. With respect to due dates within this Scope of Work, “**days**” means working days.

The Recipient shall:

For products that require a draft version, including the Final Report Outline and Final Report

- Submit all draft products electronically to the CAM for review and comment in accordance with the dates listed in Attachment 4 Project Schedule. The CAM will provide written comments to the Recipient on the draft product within 15 days of receipt, unless otherwise specified in the task/subtask for which the product is required.
- Consider incorporating all CAM comments into the final product. If the Recipient disagrees with any comment, provide a written response explaining why the comment was not incorporated into the final product.
- Submit the revised product and responses to comments within 10 days of notice by the CAM, unless the CAM specifies a longer time period, or approves a request for additional time.

For products that require a final version only

- Submit the product to the CAM for approval. The CAM may request minor revisions or explanations prior to acceptance.

For all products

- Submit all data and documents required as products in accordance with the following:

Instructions for Submitting Electronic Files and Developing Software:

- **Electronic File Format**

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- Submit all data and documents required as products under this Agreement in an electronic file format that is fully editable and compatible with the California Energy Commission's (CEC) software and Microsoft (MS)-operating computing platforms, or with any other format approved by the CAM. Deliver an electronic copy of the full text of any Agreement data and documents in a format specified by the CAM, such as via shared drives or secure file transfer.

The following describes the accepted formats for electronic data and documents provided to the CEC as products under this Agreement, and establishes the software versions that will be required to review and approve all software products:

- Data sets will be in MS Access or MS Excel file format, or any other format approved by the CAM
 - Text documents will be in MS Word file format, (.doc or .docx)
 - Presentations and related talking points will be in MS PowerPoint file format
 - Project management documents will be in a file format specified by the CAM.
- **Software Application Development**
- Use the following standard Application Architecture components in compatible versions for any software application development required by this Agreement (e.g., databases, models, modeling tools), unless the CAM approves other software applications such as open-source programs:
- Microsoft ASP.NET framework (version 3.5 and up). Recommend 4.0.
 - Microsoft Internet Information Services (IIS), (version 6 and up) Recommend 7.5.
 - Visual Studio.NET (version 2008 and up). Recommend 2010.
 - C# Programming Language with Presentation (UI), Business Object and Data Layers.
 - SQL (Structured Query Language).
 - Microsoft SQL Server 2008, Stored Procedures. Recommend 2008 R2.
 - Microsoft SQL Reporting Services. Recommend 2008 R2.
 - XML (external interfaces).

Any exceptions to the Electronic File Format requirements above must be approved in writing by the CAM. The CAM will consult with the CEC's Information Technology Services Branch to determine whether the exceptions are allowable.

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Subtask 1.2 Project Kick-off (Tranche 1)

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

The Recipient shall:

- Attend a “Kick-off” meeting with the CAM, and other CEC staff relevant to the Agreement. The Recipient’s Project Manager and any other individuals deemed necessary by the CAM, or the Project Manager shall participate in this meeting. The administrative and technical aspects of the Agreement will be discussed at the meeting. Prior to the meeting, the CAM will provide an agenda for all potential meeting participants. The meeting may take place in person or by electronic conferencing (e.g., Teams, Zoom), with approval of the CAM.

The *Kick-off Meeting* will include discussion of the following:

- The CAM’s expectations for accomplishing tasks described in the Scope of Work.
 - An updated Project Schedule.
 - Terms and conditions of the Agreement.
 - Invoicing and auditing procedures.
 - Travel.
 - Equipment purchases.
 - Administrative and Technical products (subtask 1.1).
 - CPR meetings (subtask 1.3).
 - Monthly Calls (subtask 1.5).
 - Progress reports and Invoices (subtask 1.6).
 - Final Report (subtask 1.7).
 - Match funds (subtask 1.8).
 - Permit documentation (if required, subtask 1.9).
 - Subawards (subtask 1.10).
 - Agreement changes.
 - Performance Evaluations and
 - Any other relevant topics.
- Provide *Kick-off Meeting Presentation* to include but not limited to:
 - Project overview (i.e. project description, goals and objectives, work and technical tasks, maps, expected benefits and goals, etc.)
 - Project schedule that identifies milestones
 - List of potential risk factors and hurdles, and mitigation strategy
 - Provide an *Updated Project Schedule, Match Funds Status Letter, and Permit Status Letter*, as needed to reflect any changes in the documents.

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The CAM shall:

Designate the date and location of the meeting.

- Send the Recipient a *Kick-off Meeting Agenda*.

Recipient Products:

- *Kick-off Meeting Presentation*
- Updated Project Schedule (*if applicable*)
- Match Funds Status Letter (subtask 1.8) (*if applicable*)
- Permit Status Letter (subtask 1.9) (*if applicable*)

CAM Product:

- *Kick-off Meeting Agenda*

Subtask 1.3 Critical Project Review (CPR) Meetings (Tranches 1 and 2)

The goal of this subtask is to determine if the project should continue to receive CEC funding, and if so whether any modifications must be made to the tasks, products, schedule, or budget. CPR meetings provide the opportunity for frank discussions between the CEC and the Recipient. As determined by the CAM, discussions may include project status, challenges, successes, advisory group findings and recommendations, and final report preparation. Participants will include the CAM and the Recipient and may include the CAO and any other individuals selected by the CAM to provide support to the CEC.

CPR meetings generally take place at key, predetermined points in the Agreement, as determined by the CAM and as shown in the Task List on page 1 of this Exhibit. However, the CAM may schedule additional CPR meetings as necessary. The budget may be reallocated to cover the additional costs borne by the Recipient, but the overall Agreement amount will not increase. CPR meetings generally take place at the CEC, but they may take place at another location, or may be conducted via electronic conferencing (e.g., Microsoft Teams) as determined by the CAM.

The Recipient shall:

- Prepare and submit a *CPR Report* for each CPR meeting that: (1) discusses the progress of the Agreement toward achieving its goals and objectives; and (2) includes recommendations and conclusions regarding continued work on the project.
- Attend the CPR meeting.
- Present the CPR Report and any other required information at each CPR meeting.

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The CAM shall:

- Determine the location, date, and time of each CPR meeting with the Recipient's input.
- Send the Recipient a *CPR Agenda* with a list of expected CPR participants in advance of the CPR meeting. If applicable, the agenda may include a discussion of match funding and permits.
- Conduct and make a record of each CPR meeting. Provide the Recipient with a schedule for providing a Progress Determination on continuation of the project.
- Determine whether to continue the project, and if so whether modifications are needed to the tasks, schedule, products, or budget for the remainder of the Agreement. A determination of unsatisfactory progress This may result in project delays, including a potential Stop Work Order, while the CEC determines whether the project should continue.
- Provide the Recipient with a *Progress Determination* on continuation of the project, in accordance with the schedule. The *Progress Determination* may include a requirement that the Recipient revise one or more products.

Recipient Products:

- CPR Report(s)

CAM Products:

- CPR Agenda(s)
- Progress Determination

Subtask 1.4 Final Meeting (Tranche 2)

The goal of this subtask is to complete the closeout of this Agreement.

The Recipient shall:

- Meet with CEC staff to present project findings, conclusions, and recommendations. The final meeting must be completed during the closeout of this Agreement. This meeting will be attended by the Recipient and CAM, at a minimum. The meeting may occur in person or by electronic conferencing (e.g., Microsoft Teams), with approval of the CAM.

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The technical and administrative aspects of Agreement closeout will be discussed at the meeting, which may be divided into two separate meetings at the CAM's discretion.

- The technical portion of the meeting will involve the presentation of findings, conclusions, and recommended next steps (if any) for the Agreement. The CAM will determine the appropriate meeting participants.
- The administrative portion of the meeting will involve discussion with the CAM of the following Agreement close-out items:
 - Disposition of any procured equipment.
 - The CEC's request for specific "generated" data (not already provided in Agreement products).
 - Need to document the Recipient's disclosure of "subject inventions" developed under the Agreement.
 - "Surviving" Agreement provisions such as repayment provisions and confidential products.
 - Final invoicing and release of retention.
- Prepare a *Final Meeting Agreement Summary* that documents any agreement made between the Recipient and Commission staff during the meeting.
- Prepare a *Schedule for Completing Agreement Closeout Activities*.
- Provide copies of *All Final Products* organized by the tasks in the Agreement.

Recipient Products:

- Final Meeting Agreement Summary (*if applicable*)
- Schedule for Completing Agreement Closeout Activities
- All Final Products

Subtask 1.5 Monthly Calls (Tranches 1 and 2)

The goal of this task is to have calls at least monthly between the CAM and Recipient to verify that satisfactory and continued progress is made towards achieving the objectives of this Agreement on time and within budget.

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The objectives of this task are to verbally summarize activities performed during the reporting period, to identify activities planned for future reporting period, to seek approval from CAM to proceed as appropriate, to identify issues that may affect performance and expenditures, to verify match funds are being proportionally spent concurrently or in advance of CEC funds or are being spent in accordance with an approved Match Funding Spending Plan, to form the basis for determining whether invoices are consistent with work performed, discuss any modifications to program as defined by the U.S. Department of Energy, and to answer any other questions from the CAM. Monthly calls might not be held in those months when a quarterly progress report is submitted, or the CAM determines that a monthly call is unnecessary.

The CAM shall:

- Schedule monthly calls.
- Provide questions to the Recipient prior to the monthly call.
- Provide call summary notes to Recipient of items discussed during call.

The Recipient shall:

- Review the questions provided by CAM prior to the monthly call.
- Provide verbal answers to the CAM during the call.
- Provide written responses or documentation to the CAM as requested.

Recipient Products:

- As requested, submit written responses electronically to CAM along with call summary notes.

Subtask 1.6 Progress Reports and Invoices (Tranches 1 and 2)

The goals of this subtask are to: (1) periodically verify that satisfactory and continued progress is made towards achieving the project objectives of this Agreement; and (2) ensure that invoices contain all required information and are submitted in the appropriate format.

The Recipient shall:

- Submit a monthly Invoice on the template(s) provided by the CAM. Invoices are due to the CAM 10 days after the first of each month.

Submit a quarterly Progress Report on the template(s) provided by the CAM. The report should summarize progress made on all Agreement activities as specified in the scope of work for the reporting period, including an assessment of the ability to complete the

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Agreement within the current budget and the successes and challenges of the project. Quarterly progress reports should be submitted no later than 10 calendar days after each quarter, unless otherwise specified by the CAM. Progress Reports are due to the CAM 10 days after the first of each month.

Recipient Products:

- Quarterly Progress Reports
- Monthly Invoices
- Provide written responses or support documentation to the CAM for invoices

CAM Product:

- Invoice template
- Progress Report template

Subtask 1.7 Final Report (Tranche 2)

The goal of this subtask is to prepare a comprehensive Final Report that describes the original purpose, approach, results, and conclusions of the work performed under this Agreement. When creating the Final Report Outline and the Final Report, the Recipient must use the CEC Style Manual provided by the CAM.

Subtask 1.7.1 Final Report Outline

The Recipient shall:

- Prepare a *Final Report Outline* in accordance with the *Energy Commission Style Manual* provided by the CAM.

Recipient Products:

- Final Report Outline (draft and final)

CAM Products:

- Energy Commission Style Manual
- Comments on Draft Final Report Outline
- Acceptance of Final Report Outline

Subtask 1.7.2 Final Report

The Recipient shall:

- Prepare a *Final Report* for this Agreement in accordance with the approved Final Report Outline, Energy Commission Style Manual, and Final Report Template

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provided by the CAM with the following considerations:

- Ensure that the report includes the following items, in the following order:
 - Cover page (**required**)
 - Credits page on the reverse side of cover with legal disclaimer (**required**)
 - Acknowledgements page (optional)
 - Preface (**required**)
 - Abstract, keywords, and citation page (**required**)
 - Table of Contents (**required**, followed by List of Figures and List of Tables, if needed)
 - Executive summary (**required**)
 - Body of the report (**required**)
 - References (if applicable)
 - Glossary/Acronyms (If more than 10 acronyms or abbreviations are used, it is required.)
 - Bibliography (if applicable)
 - Appendices (if applicable) (Create a separate volume if very large.)
 - Attachments (if applicable)
- Submit a draft of the report to the CAM for review and comment. The CAM will provide written comments to the Recipient on the draft product within 15 business days of receipt.
- Incorporate all CAM comments into the *Final Report*. If the Recipient disagrees with any comment, provide a *Written Responses to Comments* explaining why the comments were not incorporated into the final product.
- Submit the revised *Final Report* electronically with any *Written Responses to Comments* within 10 days of receipt of CAM's *Written Comments* on the Draft Final Report, unless the CAM specifies a longer time period or approves a request for additional time.

Recipient Products:

- Draft Final Report
- *Written Responses to Comments (if applicable)*
- Final Report

CAM Product:

- Written comments on the Draft Final Report
- Acceptance of Final Report

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Subtask 1.8 Match Funds (Tranches 1 and 2)

The goal of this subtask is to ensure that the Recipient obtains any match funds planned for this Agreement and applies them to the Agreement during the Agreement term.

While the costs to obtain and document match funds are not reimbursable under this Agreement, the Recipient may spend match funds for this task. Match funds must be identified in writing, and the Recipient must obtain any associated commitments before incurring any costs for which the Recipient will request reimbursement.

The Recipient shall:

- Prepare a *Match Funds Status Letter* that documents the match funds committed to this Agreement.

If match funds were a part of the application that led to the CEC awarding this Agreement, then provide in the letter:

- A list of the match funds that identifies:
 - The amount of cash match funds, their source(s) (including a contact name, address, and telephone number), and the task(s) to which the match funds will be applied.
 - The amount of each in-kind contribution, a description of the contribution type (e.g., property, services), the documented market or book value, the source (including a contact name, address, and telephone number), and the task(s) to which the match funds will be applied. If the in-kind contribution is equipment or other tangible or real property, the Recipient must identify its owner and provide a contact name, address, telephone number, and the address where the property is located.
 - If different from the solicitation application, provide a letter of commitment from an authorized representative of each source of match funding that the funds or contributions have been secured.
- At the Kick-off meeting, discuss match funds and the impact on the project if they are significantly reduced or not obtained as committed. If applicable, match funds will be included as a line item in the progress reports and will be a topic at CPR meetings.
- Provide a *Supplemental Match Funds Notification Letter* to the CAM of additional match funds.

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- Provide a *Match Funds Reduction Notification Letter* to the CAM if existing match funds are reduced during the course of the Agreement. Reduction of match funds may trigger a CPR meeting.

Recipient Products:

- Match Funds Status Letter
- Supplemental Match Funds Notification Letter (*if applicable*)
- Match Funds Reduction Notification Letter (*if applicable*)

Subtask 1.9 Permits (Tranches 1 and 2)

The goal of this subtask is to obtain all permits required for work completed under this Agreement in advance of the date they are needed to keep the Agreement schedule on track. Permit costs and the expenses associated with obtaining permits are not reimbursable under this Agreement. Permits must be identified and obtained before the Recipient may incur any costs related to the use of the permit(s) for which the Recipient will request reimbursement.

The Recipient shall:

- Prepare a *Permit Status Letter* that documents the permits required to conduct this Agreement. If no permits are required at the start of this Agreement, then state this in the letter. If permits will be required during the course of the Agreement, provide in the letter:
 - A list of the permits that identifies: (1) the type of permit; and (2) the name, address, and telephone number of the permitting jurisdictions or lead agencies.
 - The schedule the Recipient will follow in applying for and obtaining the permits.

The list of permits and the schedule for obtaining them will be discussed at the Kick-off meeting (subtask 1.2), and a timetable for submitting the updated list, schedule, and copies of the permits will be developed. The impact on the project if the permits are not obtained in a timely fashion or are denied will also be discussed. If applicable, permits will be included as a line item in progress reports and will be a topic at CPR meetings.

- If during the course of the Agreement additional permits become necessary, then provide the CAM with an *Updated List of Permits* (including the appropriate information on each permit) and an *Updated Schedule for Acquiring Permits*.
- Send the CAM a *Copy of Each Approved Permit*.

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- If during the course of the Agreement permits are not obtained on time or are denied, notify the CAM within 5 days. Either of these events may trigger a CPR meeting.

Recipient Products:

- Permit Status Letter
- Updated List of Permits (*if applicable*)
- Updated Schedule for Acquiring Permits (*if applicable*)
- Copy of Each Approved Permit (*if applicable*)

Subtask 1.10 Subawards (Tranches 1 and 2)

The goals of this subtask are to: (1) procure subawards required to carry out the tasks under this Agreement; and (2) ensure that the subawards are consistent with the terms and conditions of this Agreement.

The Recipient shall:

- Manage and coordinate subrecipients activities in accordance with the requirements of this Agreement.
- Incorporate this Agreement by reference into each subaward.
- Include any required Energy Commission flow-down provisions in each subaward, in addition to a statement that the terms of this Agreement will prevail if they conflict with the subaward terms.
- If requested by the CAM, submit a draft of each *Subaward* required to conduct the work under this Agreement.
- If requested by the CAM, submit a final copy of each executed subaward.
- Notify and receive written approval from the CAM prior to adding any new subrecipient (see the terms regarding subrecipient additions in the terms and conditions).

Recipient Products:

- Subawards

II. TECHNICAL TASKS

TASK 2: PROJECT TRACKING, DATA COLLECTION, AND REPORTING (TRANCHES 1 AND 2)

Subtask 2.1 Data Collection (Tranches 1 and 2)

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The goal of this subtask is to submit key performance targets for the project using the metrics listed in the Solicitation Manual, Attachment 9 Project Performance Metrics and Measurement and Verification Requirements, which may be modified and must be approved by the CAM. These metrics will ensure accuracy and accountability as the project moves forward.

The Recipient shall:

- Incorporate a draft version of a *Measurement & Verification Plan* in their Project Narrative that aligns with the performance metrics listed in Attachment 9 Project Performance Metrics and M&V Requirements Instructions.
- Incorporate all CAM comments into the Final Measurement and Verification Plan.
- Submit the revised Final Measurement and Verification Plan electronically to the CAM.
- Collect data from program activities as specified by the Final Measurement and Verification Plan.
- Submit metrics electronically to the CAM in accordance with the dates listed in Attachment 4 Project Schedule.

Recipient Products:

- Measurement and Verification Plan (draft and final)
- Metrics reports

Subtask 2.2 Summarizing and Analyzing Data Collection (Tranches 1 and 2)

CREATE will collect and organize all training data needed to provide the CEC with a comprehensive picture of the program's performance, its ability to meet grant requirements, and its success in gathering meaningful employer and trainee information. This data will also play a central role in informing the development of a statewide contractor and worker certification program focused on residential energy efficiency—an effort that could establish consistent standards, elevate training quality, and build long-term workforce capacity across California.

The Recipient shall:

- Analyze enrollment and qualification reporting (January 2027 – July 2028)
 - Review of trends in training and job placement
 - Compare pre-training data with post-training data
- Convene Grant Partners Meetings (January 2027 – July 2028)

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- Convene Communities of Practice (COP) meetings—both in person and via Zoom—with Building Trade Councils (BTC) and JATC partners to review reporting requirements and share updates.
- Gather feedback on how CREATE can better meet the needs of BTCs, JATCs, and participating apprentices, and identify opportunities to strengthen program implementation.
- Facilitate discussions on the potential development of a statewide residential energy-efficiency certification program, exploring interest, feasibility, and stakeholder recommendations.

Recipient Products:

- Documentation of analytic methodology
- Data summarization

TASK 3: IMPLEMENT TRAINING PROGRAM

Subtask 3.1 Aligning Partners (Tranches 1 and 2)

The goal of this task is to convene the CREATE task team to allocate training funds to JATCs to strengthen the workforce supporting residential energy-efficiency work and ensure that all funds are used exclusively for the approved training activities outlined in this grant. The task team will work with the BTCs, JATCs and Contractor partners to discuss each area's workforce development needs.

The Recipient shall:

- Create a Workplan and Timeline of Activities Rollout (August 2026)
 - Set up in-person meetings with the SBCTC and Strategy partners to review residential and energy-efficiency goals.
 - Establish project timelines.
 - Review partner roles and responsibilities.
 - Schedule ongoing planning and check-in meetings.
 - Discuss the feasibility of a statewide residential energy-efficiency certification program.
- Set up Platform for JATC Reimbursements (August 2026)
 - Build an online system for JATCs to submit enrollment and reimbursement documents.
 - Set up accounting software to support payments and tracking.
 - Establish quarterly, monthly, and weekly tasks for the program auditor, including required reporting.

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- Align Grant Partners (August-September 2026)
 - Convene COP meetings (in-person and via Zoom) with BTC and JATCs to ensure transparency and alignment of grant goals.
 - Review timelines and qualifications for earning funding.
 - Send surveys to identify participating JATCs and apprentices (Tranche 1).
 - Send follow-up surveys to identify additional participants (Tranche 2).
- Revise the SBCTC & Strategy Rollout of Tranche 2 (July 2027)
 - Meet with partners to review progress used in Tranche 1 and realign goals if needed.
 - Establish any updated timelines.
 - Confirm ongoing roles and responsibilities.
 - Schedule future planning and check-ins.
 - Begin foundational work for the statewide residential energy-efficiency certification program.
- If required by the DOE, between Tranche 1 and 2, make any necessary modifications or incorporate feedback.

Recipient Products:

- Draft and Final Workplan and timeline of activities
- Platform for JATC Reimbursements
- Surveys to JATCs and to identify additional participants
- Revise strategy rollout for Tranche 2 (if necessary)

Subtask 3.2 Sheet Metal, IBEW and UA Training Program Outreach (Tranches 1 and 2)

The goal is to ensure that funds will be distributed only after JATCs provide documentation demonstrating full compliance with the grant's requirements and allowable uses. Funds will be released to trainees in four student cohorts. A trainee or JATC meets the criteria for funding when **one or more** of the following conditions apply:

1. Trainee Participation in Residential-Focused Training
 - The trainee is enrolled in a *residential apprenticeship program*, or
 - The trainee is taking courses directly related to *residential energy-efficiency*, or
 - The trainee is currently working on a *residential construction, retrofit, or energy-efficiency project*.

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2. Residential Project Labor Agreements (PLAs)
 - When available, the JATC or BTC identifies one or more *PLAs covering residential work* in the geographic area where trainees may be placed.
3. The JATC has purchased *new training equipment* specifically intended for developing skills used in residential training or for work on residential projects.

The Recipient shall:

- Release funds to four cohorts
- If required by the DOE, between Tranche 1 and 2, make any necessary modifications or incorporate feedback.
- Perform the following functions for each cohort:
 - **Cohort 1 (Tranche 1)**
 - Preparing for Program Start (August 2026)
 - Develop program materials for JATCs and apprentices.
 - Conduct program orientations.
 - Finalize sign-ups for the Fall 2026 cohort.
 - Earning Training Funds (September 2026)
 - Collect required documentation from JATCs and partners.
 - Log JATC training activity.
 - Meet with partners as needed to ensure compliance with grant requirements.
 - Qualifying of Payments (December 2026)
 - Collect JATC verifications of earned payments.
 - Review all verification materials for compliance.
 - Meet with JATCs to resolve any compliance concerns.
 - Distributing Payments & Reports (April 2027)
 - Disburse payments to JATCs based on verified participation.
 - Provide allotment reports to partners.
 - **Cohort 2 (Tranche 1)**
 - Preparing for Program Start (December 2026)
 - Develop program materials for JATCs and apprentices.
 - Conduct program orientations.
 - Finalize sign-ups for the Winter 2027 cohort.
 - Earning Training Funds (January 2027)
 - Collect required documentation from JATCs and partners.
 - Log JATC training activity.

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- Meet with partners as needed to ensure compliance with grant requirements.
- Qualifying of Payments (May 2027)
 - Collect JATC verifications of earned payments.
 - Review all verification materials for compliance.
 - Meet with JATCs regarding any concerns.
- Distributing Payments & Reports (July 2027)
 - Disburse payments based on verified participation.
 - Provide allotment reports to partners.
- **Cohort 3 (Tranche 2)**
 - Preparing for Program Start (August 2027)
 - Develop program materials for JATCs and apprentices.
 - Conduct program orientations.
 - Finalize sign-ups for the Fall 2027 cohort.
 - Work on possible steps for development of a statewide residential energy-efficiency certification program.
 - Earning Training Funds (August 2027)
 - Collect required documentation from JATCs and partners.
 - Log JATC training activity.
 - Meet with partners as needed to ensure compliance with grant requirements.
 - Qualifying Payments (December 2027)
 - Collect JATC verifications of earned payments.
 - Review all verifications materials for compliance.
 - Meet with JATCs to resolve any compliance concerns.
 - Distributing Payments & Reports (April 2028)
 - Disburse payments to JATCs based on verified participation.
 - Provide allotment reports to partners.
- **Cohort 4 (Tranche 2)**
 - Preparing for Program Start (December 2027)
 - Develop program materials for JATCs and apprentices.
 - Conduct program orientations.
 - Finalize sign-ups for the Spring 2028 cohort.
 - Earning Training Funds (January 2028)
 - Collect required documentation from JATCs and partners.
 - Log JATC training activity.
 - Meet with partners as needed to ensure compliance with grant requirements.
 - Qualifying of Payments (May 2028)
 - Collect JATC verifications of earned payments.

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- Review all verification materials for compliance.
- Meet with JATCs to resolve any compliance concerns.
- Distributing Payments & Reports (July 2028)
 - Disburse payments to JATCs based on verified participation.
 - Provide allotment reports to partners.
 - Proposal for possible steps for development of a statewide residential energy-efficiency certification program.

Recipient Products:

- Draft and Final Program materials
- Proposal of possible steps for development of a statewide program

Subtask 3.3 Preliminary Evaluation Report (Tranche 1)

The goal of this subtask is to develop a Preliminary Evaluation Results report. The draft products may be adjusted based on feedback from the CAM and the final products must be approved by the CAM. This is required by the Department of Energy prior to DOE's approval to access funds from the second tranche.

The Report shall include at a minimum:

- Plans for incorporating the evaluation results into improving current programs.
- Progress against goals, activities, and metrics.
- Feedback from program participants collected by the program.
- Process and program design improvements that would increase the likelihood of meeting program goals, activities, and metrics.
- Review of program impacts.
- Recommendations for improvement as identified by the program evaluation.

The Recipient Shall:

Submit the Preliminary Evaluation Report electronically to the CAM in accordance with the date listed in Attachment 4 Project Schedule.

Recipient Products:

- Draft and Final Preliminary Evaluation Report

CAM Products

- Report template

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Subtask 3.4 Evaluations and Program Improvement for Training Program (Tranche 1)

The goal of this task is to analyze and summarize exit surveys submitted by JATCs to strengthen and refine the second tranche of funding. CREATE staff and partners will review survey results alongside the documented distribution of funds to each JATC. This review will include an assessment of the criteria used by JATCs to request payments, allowing the team to identify trends, challenges, and impacts in how funds were utilized during the first tranche.

The Recipient shall:

- Review the requirements of the Preliminary Evaluation Report
- Share the results of Cohort 1 with participating IBEW, UA, and Sheet Metal stakeholders to ensure transparency and alignment on program performance.
- Gather feedback on how CREATE can better meet the needs of BTCs, JATCs, and participating apprentices
- Use stakeholder input to refine and strengthen program design and implementation for future cohorts.
- Submit a comprehensive report to the CEC that clearly outlines the plan for Tranche 2, incorporating lessons learned from Cohort 1 and stakeholder recommendations.

Recipient Products:

Report that provides a program improvement plan for Tranche 2 updates

TASK 4: STRATEGY STANDARDIZATION (Tranche 2)

The standardization of quality benchmarks and long-term workforce development strategies is needed to support a growing residential energy sector both within and beyond this grant. Based on program improvement findings from subtask 3.4, CREATE will convene meetings with BTC, JATC, and contractor partners to evaluate recommended adjustments. These discussions will focus on improving program effectiveness and better supporting the overarching goal: building a more skilled workforce of electricians, plumbers, pipefitters, and sheet metal workers capable of constructing, retrofitting, installing, and servicing energy-efficient residential buildings. This will result in a white paper focused on sustainability for residential high-efficiency curriculum that will include program and policy recommendations.

The Recipient shall:

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- Convene Grant Partners Meetings
 - Communities of Practice (COP) meetings—both in person and via Zoom— with BTC and JATC partners to review program data, share program updates, and identify opportunities for ongoing improvement.
- Get feedback on how CREATE can better meet the needs of BTCs, JATCs, and participating apprentices, and use this input to strengthen program design and implementation.
- Facilitate discussions with IBEW, UA, and Sheet Metal participants and other stakeholders on the potential development of a statewide residential energy-efficiency certification program, assessing stakeholder interest, feasibility, and stakeholder recommendations.

Recipient Products:

- Draft and Final White paper containing policy and program recommendations for sustainability

IV.PROJECT SCHEDULE

Please see the attached Excel spreadsheet labeled Attachment 4 Project Schedule.