



**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-26-003 with the State Building and Construction Trades Council of California for a \$1,500,000 grant. The project will implement the California Residential Energy Services Supporting Training (CRESST) project, which will provide childcare stipends and required safety tools to income-qualified apprentices in residential electrical, plumbing, and heating, ventilation, and air conditioning training programs. The purpose of this project is to reduce financial barriers that prevent apprentices from completing residential energy-efficiency training and will support workforce availability; 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-26-003

### 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 2: Workforce Enablement

### E. Term and Amount

1. Start Date: July 8, 2026
2. End Date: July 31, 2028
3. Amount: \$1,500,000

### 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: 5minutes.
6. The email subscription topic is: Decarbonization Topics, Federal IRA Residential Incentives, Efficiency Topics

#### **Project Description:**

Proposed resolution approving agreement FED-26-003 with the State Building and Construction Trades Council of California for a \$1,500,000 grant. The project will implement the California Residential Energy Services Supporting Training (CRESST) project, which will provide childcare stipends and required safety tools to income-qualified apprentices in residential electrical, plumbing, and heating, ventilation, and air conditioning training programs. The project will reduce financial barriers that prevent apprentices from completing residential energy-efficiency training and will support workforce availability.

### 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 stipends to income-qualified apprentices in residential electrical, plumbing, and heating, ventilation, and air conditioning training programs.

**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”.

<b>Additional Documents</b>	<b>Applies</b>
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	\$203,990	\$203,989

**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 (for Childcare Stipends)	\$126,853	\$0
California State Pipetrades Council (for Childcare Stipends)	\$126,853	\$0
Western States Council of SMART (for Childcare Stipends)	\$126,853	\$0
California Statewide Joint Apprenticeship and Training Committee (for Personal Safety Tools)	\$24,707	\$0
California State Pipetrades Council (for Personal Safety Tools)	\$24,707	\$0
Western States Council of SMART (for Personal Safety Tools)	\$24,707	\$0

**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
No key partners to report

**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: Kathleen Barber

Address: 875-A Island Dr. #3778

City, State, Zip: Alameda, CA 94502

Phone: (650) 773-2874

E-Mail: kathleen@strategy-workplace.com

**2. Recipient's Project Manager**

Name: Curtis Notsinneh

Address: 875-A Island Dr. #3778

City, State, Zip: Alameda, CA 94502

Phone: (916) 893-6269

E-Mail: curtis@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



Item Number	Item Name	Attached
2	Exhibit B, Budget Detail	Yes
3	CEC 105, Questionnaire for Identifying Conflicts	Yes
4	Recipient Resolution	No
5	Awardee CEQA Documentation	Yes

**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:** 05/29/2026

**Scope of Work**  
**State Building and Construction Trades Council of California**  
**California Residential Energy Services Supporting Training (CRESST)**

**I. TASK ACRONYM/TERM LISTS**

**A. Task List**

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

**B. Acronym/Term List**

<b>Acronym/Term</b>	<b>Meaning</b>
BTC	Building Trades Council
CAM	Commission Agreement Manager
CAO	Commission's Agreement Officer
CA-TREC	California Training for Residential Energy Contractors
CEC	California Energy Commission
COP	Community of Practice Convenings
CPR	Critical Project Review
CRESST	California Residential Energy Services Supporting Training
DAS	Department of Apprenticeship Standards
ERiCA	Equal Representation in Construction Apprenticeship
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

**Scope of Work**  
**State Building and Construction Trades Council of California**  
**California Residential Energy Services Supporting Training (CRESST)**

**II. PURPOSE OF AGREEMENT, PROBLEM/SOLUTION STATEMENT, AND GOALS AND OBJECTIVES**

**A. Purpose of Agreement**

The purpose of this Agreement is to fund essential support services that help develop a highly skilled workforce of electricians, plumbers and pipefitters, and sheet metal workers capable of building, retrofitting, and servicing energy-efficient residential buildings across California. California Residential Energy Services Supporting Training (CRESST) funds will cover the critical support costs, safety equipment, and childcare—that often pose financial hardships for apprentices. By reducing these barriers, the program will ensure that more apprentices can afford to participate fully in their training programs and meet work requirements, ultimately strengthening California’s residential energy-efficiency workforce.

**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. For many, careers in skilled trades remain one of the most reliable pathways into the middle class. Yet this pathway is often blocked. Many apprentices face major financial hardships, childcare, and the high cost of required safety equipment—that make it difficult, and sometimes impossible, to attend apprenticeship classes, stay enrolled, or meet work requirements.

Contractors and their Joint Apprenticeship Training Committees (JATCs) do not have the resources to cover these support costs for apprentices. Even when individuals are highly motivated to enter the trades, the cost of participating in apprenticeship programs can force low-income workers to choose lower-paid, lower-quality jobs instead. As a result, contractors struggle to meet the rapidly growing demand for workers trained to do residential energy efficiency work, and entire communities miss out on access to strong career pathways. Without addressing these support-cost barriers, the cycle of low-wage employment persists for people who are seeking to build better lives but simply cannot afford the expenses required to complete apprenticeship training. Without targeted support to make apprenticeship participation affordable, the state will continue to fall short of its goals related to residential construction project delivery and the expansion of high-quality, family-sustaining careers.

**Solution**

## **Scope of Work**

### **State Building and Construction Trades Council of California California Residential Energy Services Supporting Training (CRESST)**

A surge in federal and state investments in energy efficient housing has created unprecedented demand for residential construction workers across California. To meet this demand, unions and employers must attract and retain a more diverse workforce, especially individuals who have been historically underrepresented in the trades. The proposed CRESST funds for childcare and safety equipment will make apprenticeship a truly viable pathway for many hard-to-serve Californians who would otherwise be shut out. Access to these funds will allow apprentices with limited financial means to stay enrolled in their programs and meet work requirements. Under the State Building and Construction Trade Council (SBCTC) umbrella, and the projects state and federal investments are making in the energy efficient housing space, joint apprenticeship training programs will be able to expand enrollment by supporting apprentices who might not otherwise choose—or be able to remain in—a construction apprenticeship because of the financial burdens associated with training.

SBCTC is positioned to deliver this solution due to its existing statewide workforce development program and the labor-management infrastructure its union JATCs possess with their contractor partners. The Council will create a streamlined and accountable method for distributing support funds, ensuring they are used appropriately and effectively. Distribution of childcare resources will follow the successful model used under Department of Apprenticeship Standards (DAS's) **Equal Representation in Construction Apprenticeship** (ERiCA 1) program, which between 2023 and 2025 distributed over \$2 million in childcare stipends. This proven approach will certify both that trainees are eligible and that funds will be used solely for the intended purposes of childcare and safety equipment.

CRESST directly responds to the needs of Californians who want to improve their lives through apprenticeship but cannot afford the costs of childcare or basic safety gear required for training and onsite work. By covering these essential support expenses, CRESST will strengthen local hire pipelines critical to meeting the demand for energy efficient residential construction. And by enabling contractors to reliably staff residential projects, CRESST will accelerate California's transition to cleaner, more high-performance housing—while opening the door to stable, middle-class careers for thousands of residents.

### **C. Goals and Objectives of the Agreement**

#### **Agreement Goals**

The goals of this Agreement are to:

- Increase the number of qualified residential electricians, plumbers/pipefitters, and sheet metal workers so contractors can meet the rapidly growing workforce needs in California's residential construction sector.

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**California Residential Energy Services Supporting Training (CRESST)**

- Expand access to these well-paid careers by making apprenticeship genuinely affordable for community members with limited access to services.
- Provide targeted support, including childcare stipends and essential personal safety tools—to apprentices identified as needing assistance, ensuring they can remain enrolled, meet work requirements, and successfully complete their training.
- Strengthen local communities by creating stable, high-quality career pathways that deliver long-term economic opportunity for residents while supporting California’s broader goals.

**Agreement Objectives**

The objectives of this Agreement are to:

- Convene contractors, Building Trades representatives, and JATC partners—organized by local communities—to explain the purpose of CRESST and outline participation opportunities, expectations, and support requirements.
- Outreach to a total of 57 JATCs across tranches 1 and 2 to participate in and enroll their apprentices in the CRESST initiative.
- Develop and implement a streamlined, secure process for providing 644 total apprentices across tranches 1 (322 apprentices) and 2 (322 apprentices) with childcare stipends and safety equipment while they are active in a DAS-approved apprenticeship program.
- Survey all participating partners to assess whether JATCs experienced increased access among local apprentice enrollment and whether contractors increased their bidding on and receipt of residential projects as a result of expanded access to local construction apprentices.

**II. 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**.

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”

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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**
  - 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:

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### **State Building and Construction Trades Council of California California Residential Energy Services Supporting Training (CRESST)**

- 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.

#### **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 to 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:

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- 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.

**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)**

## **Scope of Work**

### **State Building and Construction Trades Council of California California Residential Energy Services Supporting Training (CRESST)**

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.

#### **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.

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**California Residential Energy Services Supporting Training (CRESST)**

**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.

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*)

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**California Residential Energy Services Supporting Training (CRESST)**

- 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.

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 on 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.

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### **State Building and Construction Trades Council of California California Residential Energy Services Supporting Training (CRESST)**

- 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 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 provided by the CAM with the following considerations:

## **Scope of Work**

### **State Building and Construction Trades Council of California California Residential Energy Services Supporting Training (CRESST)**

- 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) (CRESST 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

#### **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.

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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.
- 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*)

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#### **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*.
- 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)**

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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 of subrecipient additions in the terms and conditions).

**Recipient Products:**

- Subawards

**III. TECHNICAL TASKS**

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

**Subtask 2.1 Data Collection (Tranches 1 and 2)**

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.

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- 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)**

CRESST will collect and organize all support cost distribution 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.

**The Recipient shall:**

- Analyze enrollment and qualification reporting (January 2027 – July 2028)
  - Reporting for Cohort 1 & 2 (Tranche 1)
    - Review of trends in support services needed in areas and by trade.
    - Compare pre-training data with post-training/placement data on completion/placement rates in areas and by trade.
    - Complete report documenting program successes and challenges
  - Reporting for Cohort 3 & 4 (Tranche 2)
    - Review of trends in support services needed in areas and by trade.
    - Compare pre-training data with post-training/placement data on completion/placement rates in areas and by trade.
    - Complete report documenting program successes and challenges
- Convene Grant Partners Meetings (January 2027 – July 2028)
  - Convene Communities of Practice (COP) meetings—both in person and via Zoom—with the Building Trades Council (BTC) and JATC partners to review reporting requirements and share updates.
  - Gather feedback on how CRESST can better meet the support costs needs of BTCs, JATCs, and participating apprentices, and identify opportunities to strengthen program implementation.
  - Research into how needed support might be funded after the completion of the CRESST funding.

**Items to be distributed:**

- Personal Safety Tools

**Recipient Products:**

- Documentation of analytical methodology
- Data summarization

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**TASK 3 IMPLEMENT TRAINING PROGRAM**

**Subtask 3.1 Aligning Grant Support (Tranche 1)**

The goal of this subtask is to convene the CRESST task team to allocate support cost funds to JATCs' apprentices. This will strengthen the workforce supporting residential energy-efficiency work and ensure that all funds are used exclusively for the approved costs outlined in this grant. The task team will work with the BTCs, JATCs and contractor partners to discuss each area's workforce support cost needs.

**The Recipient Shall:**

- Create a Workplan and Timeline of Activities Rollout (August 2026)
  - Set up in-person meetings with the SBCTC and Strategy Workplace Communications (Strategy) partners to review support cost program eligibility and goals.
    - Establish project timelines.
    - Review partner roles and responsibilities.
    - Schedule ongoing planning and check-in meetings.
- Set up Platforms for Distribution of Apprentices' Support Cost (August 2026)
  - Build out an online system for to qualify apprentices and to distribute childcare stipends.
  - Build out an online system for qualifying apprentices and to distribute gas card vouchers.
  - Build out an online system for qualifying apprentices and to send out safety equipment.
  - Set up accounting software to support payments and tracking.
  - Establish quarterly, monthly, and weekly tasks for the program auditor, including required reporting.
- Align Grant Partners (August - Sept 2026)
  - Convene COP meetings (in-person and via Zoom) with BTC and JATCs to ensure transparency and alignment on support cost program eligibility and goals.
  - Review timelines and qualifications for applying for support cost 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.

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**Recipient Products:**

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

**Subtask 3.2 Implement and Fund Support Cost Program (Tranches 1 and 2)**

The goal is to ensure that funds are distributed only after JATCs, and apprentices submit documentation demonstrating full compliance with all program requirements and allowable uses. Funding will be released to trainees in four student cohorts, and each trainee must meet the criteria outlined in the two-part qualification process described below:

Part I — Residential Work Qualifications (To be submitted by the JATC)

Trainees must meet one or more of the following criteria.

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.
2. Residential Project Labor Agreements (PLAs)
  - Where PLAs exist, the JATC or BTC identifies one or more PLAs covering residential work within the geographic area where trainees may be placed.
3. Investment in Residential Training Equipment
  - The JATC has purchased new training equipment specifically intended to support residential skills development or to prepare apprentices for work on residential projects.

Part II — Support Cost Qualification (To be submitted by the apprentice)

1. Childcare Stipend
  - Apprentice provides verification of a child or children under age 13.
  - Apprentice submits childcare expense receipts.
2. Personal Safety Tools
  - Apprentice completes the safety-equipment request form and submits purchase receipts for from approved safety items lists created by JATCs.

**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:

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- **Cohort 1 (Tranche 1)**
  - Preparing for Support Cost Program Start (August 2026)
    - Develop all program materials for JATCs and apprentices.
    - Conduct orientations to explain support cost eligibility, documentation, and determination procedures.
    - Finalize the support cost sign-up process for cohort.
  - Earning Training Funds (September 2026)
    - Collect required documentation from JATCs and partners.
    - Enroll apprentices in one to three support cost categories, based on demonstrated need.
    - Review all verification materials to ensure full compliance with grant requirements.
    - Meet with partners as needed to resolve issues and ensure proper implementation.
  - Distributing Stipends, Vouchers, and Reports (September - December 2026)
    - Disburse childcare stipends and safety-equipment reimbursements after verifying qualifications.
    - Provide detailed allotment reports to JATC and BTC partners.
- **Cohort 2 (Tranche 1)**
  - Preparing for Support Cost Program Start (December 2026)
    - Develop all program materials for JATCs and apprentices.
    - Conduct orientations to explain support cost eligibility, documentation, and determination procedures.
    - Finalize the support cost sign-up process for cohort.
  - Earning Training Funds (January 2027)
    - Collect required documentation from JATCs and partners.
    - Enroll apprentices in one to three support cost categories, based on demonstrated need.
    - Review all verification materials to ensure full compliance with grant requirements.
    - Meet with partners as needed to resolve issues and ensure proper implementation.
  - Distributing Stipends, Vouchers, and Reports (July 2027)
    - Disburse childcare stipends and safety-equipment reimbursements after verifying qualifications.
    - Provide detailed allotment reports to JATC and BTC partners.
- **Cohort 3 (Tranche 2)**
  - Preparing for Support Program Start (August 2027)
    - Develop all program materials for JATCs and apprentices.
    - Conduct orientations to explain support cost eligibility, documentation, and determination procedures.

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- Finalize the support cost sign-up process for cohort.
- Earning Training Funds (August 2027)
  - Collect required documentation from JATCs and partners.
  - Enroll apprentices in one to three support cost categories, based on demonstrated need.
  - Review all verification materials to ensure full compliance with grant requirements.
  - Meet with partners as needed to resolve issues and ensure proper implementation.
- Distributing Stipends, Vouchers, and Reports (April 2028)
  - Disburse childcare stipends and safety-equipment reimbursements after verifying qualifications.
  - Provide detailed allotment reports to JATC and BTC partners.
- **Cohort 4 (Tranche 2)**
  - Preparing for Support Cost Program Start (December 2027)
    - Develop all program materials for JATCs and apprentices.
    - Conduct orientations to explain support cost eligibility, documentation, and determination procedures.
    - Finalize the support cost sign-up process for cohort.
  - Earning Training Funds (January 2028)
    - Collect required documentation from JATCs and partners.
    - Enroll apprentices in one to three support cost categories, based on demonstrated need.
    - Review all verification materials to ensure full compliance with grant requirements.
    - Meet with partners as needed to resolve issues and ensure proper implementation.
  - Distributing Stipends, Vouchers, and Reports (July 2028)
    - Disburse childcare stipends and safety-equipment reimbursements after verifying qualifications.
    - Provide detailed allotment reports to JATC and BTC partners.

**Recipient Products:**

- Draft and Final Program materials

**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.

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**The Report shall include at 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

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

The goal of this subtask is to analyze and summarize exit surveys submitted by JATCs to strengthen and refine the second tranche of funding. CRESST 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 apprentices to request support cost funds, allowing the team to identify trends, challenges, and impacts in how funds were distributed and utilized during the first tranche.

Submit the Preliminary Evaluation Report

- Review of the requirements of the Preliminary Evaluation Report
- Share the results of Cohort 1 with stakeholders to ensure transparency and alignment on program performance.
- Gather feedback on how CRESST 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 for Tranche 2 support cost stipends.

**Recipient Products:**

Report that outlines plan for Tranche 2 updates

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**TASK 4: STRATEGY STANDARDIZATION (Tranche 2)**

The standardization of quality benchmarks, and long-term workforce development strategies needed to support local hires. Based on the findings, CRESST will convene meetings with BTC, JATC, and contractor partners to evaluate recommended adjustments. These discussions will focus on improving program’s distribution of support funds to the apprentices so that employers can build a more skilled workforce of electricians, plumbers, pipefitters, and sheet metal workers capable of constructing, retrofitting, installing, and servicing energy-efficient residential buildings.

**The Recipient shall:**

- Convene Grant Partners Meetings
  - Convene 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 CRESST can better meet the support cost needs of BTCs, JATCs, and participating apprentices, and use this input to strengthen program design and implementation.
- Explore long-term ways of meeting apprentice needs for support costs after the CRESST funding is over.

**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.