



# TECH

## CLEAN CALIFORNIA

### Quick Start Grant Application Form

#### Instructions

1. To receive communications during the application period, submit your intent to bid via email to [TECH.pilots@energy-solution.com](mailto:TECH.pilots@energy-solution.com) with the subject line "Quick Start Grants – Intent to bid"
2. Direct all questions via email to [TECH.pilots@energy-solution.com](mailto:TECH.pilots@energy-solution.com) with the subject line "Quick Start Grants – Q&A" before 5:00 PM PDT June 30, 2022. Questions and answers will be added on a rolling basis to the QSG website, <https://energy-solution.com/tech-qsg/>
3. Review the information on the TECH website and the QSG page, which provide resources on the broader TECH initiative and other funding resources.
4. Fill in the following application form.
5. Submit final proposals via email to [TECH.pilots@energy-solution.com](mailto:TECH.pilots@energy-solution.com) with the subject line "Quick Start Grants – [Company Name]" by 5:00 PM PDT on July 31, 2022.

#### Contact Info

Project name:	
Lead organization name & primary point of contact:	
Mailing Address:	
Subcontractors (list):	
Is your company a DBE or non-profit in the state of California?	

<p>If your company is a DBE, please provide the type and attach certification:</p>	
<p>Does the proposal team accept the contractors Terms &amp; Conditions? If no, please attach an explanation.</p>	

**Applicant Eligibility:**

<p>Are you a current recipient of a Quick Start Grant?</p>	
<p>In which gas IOU service territories will your project take place?</p>	<p>PG&amp;E SoCalGas SDG&amp;E SW Gas</p>
<p>Please indicate which focus area(s) your proposed project fulfills (see Solicitation Focus Areas on page 1). List all that apply:</p>	

## **Proposed Project**

1. Please provide a brief summary of your project. Please clearly describe the barrier(s) to heat pump deployment addressed by the project, how project approach will address these barrier(s), where and/or with whom the work will take place, and if a specific housing type (e.g., single family, multifamily, regulated affordable, naturally occurring affordable, etc.) or community type (e.g., urban, rural) is being targeted. (1 page, ~500 words)

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2. How will you define success for your project, and how will you know if your intervention was successful in contributing to the expansion of the heat pump market? If your project is successful, how could it be scaled statewide or incorporated into the overall approach of the TECH program after the end of the grant period? (1 page, ~500 words)

3. Describe the need for QSG funding for this project. For example, explain how QSG funding will contribute to existing sources of funding (cost share). Or, explain how this project is not eligible for other available sources of funding. (1/2 page, ~250 words)

5. In the following table, provide SMART (specific, measurable, achievable, realistic, and time-bound) goals (column 1) and the associated indicator of success or metrics (column 2). In column 3, enter a description of how you will gather the necessary data and any analytical methods you will use, if applicable. Indicators of success may be qualitative (e.g., change in attitude toward heat pumps) or quantitative (e.g., emissions reduced, # of customers, # of units). Attach additional pages if more space is needed.

SMART goal or objective	Indicator of success	Data Collection and/or Analysis Approach
<i>e.g., Increase low-income households' trust in HPWH within 6 months</i>	<i>Percentage of pilot participants in outreach activities reporting an increase in their level of trust of HPWH</i>	<i>Surveys, interviews, focus group, etc.</i>
<i>e.g., Increase low-income households HPWH adoption within 1 year</i>	<i>Number of units installed</i>	<i>Program monitoring tool</i>



9. Please provide an implementation plan and complete the proposed milestone table with timeline for the project. Please describe your proposed activities under each milestone/task. The final task should include program deliverables including a final report documenting the work done to date and findings related to the pilot research questions or demonstration objectives. Selected grantees will also be expected to discuss successes, challenges and lessons learned throughout the project. Attach additional pages if more space is needed.

Milestone/ Task Number	Activities	Deliverables	Timeline
1	<ul style="list-style-type: none"> <li>• <i>e.g. Kickoff meetings with TECH</i></li> <li>• <i>Market assessment focus groups</i></li> </ul>	<i>Agenda, meeting notes, focus group notes, etc.</i>	<i>January – February 2023</i>



10. Describe how the qualifications and expertise of the applicants will support the success of the project. If multiple organizations are applying, describe the specific role of each partner. Describe your organization's or project team's relationship with or experience working in any specific locations/communities targeted in the project.

11. Please supply three (3) references (name, company/organization, email, phone number)

Reference 1	
Reference 2	
Reference 3	

12. Please attach any supporting materials that strengthen your proposal (e.g., links to similar projects completed, letters of support, results from other pilots/projects). Proposals seeking funding over \$100,000 are strongly encouraged to add supporting materials.

## Budget

13. Itemized budget table. If more space is needed, attach a separate document. Attach quotations for price estimates where applicable.

Note: 'Cost per unit' and 'total units' refer to the line item. For example, unit cost could represent labor rates (e.g., \$/hour or \$/FTE) or actual or estimated costs of heat pump equipment, M&V equipment, software, or other intellectual property.

Line Item (equipment, labor, etc.)	Cost Per Unit (\$)	Source for Price Estimate	Total Units	Cost (\$)
<b>Total Cost of Project</b>				
<b>Leveraged Funds</b>				
<b>Total Funding Requested</b>				

14. Propose your milestone-based payment structure. Project initiation/mobilization is an acceptable milestone if upfront funds are needed at the outset of the project. Please use the following table. If more space is needed, attach a separate document.

Milestone	% of Total Requested Budget	Amount (\$)	Expected Date

15. Funding match/leveraged funds detail. Please provide a description of what is covered by this funding and what is excluded. It should be clear from this table and the rest of the application why Quick Start Grant funding is needed to support the project. If more space is needed, attach a separate document. Attach documentation.

Funding Source	Description of Funding	Amount (\$)
<b>Total</b>		

# Appendix: Quick Start Grant Terms and Conditions

## Quick Start Grant Recipient Information

Company Name			
Parent Company Name (if applicable)			
Street Address	City	State	Zip
Mailing Address (if different from above)	City	State	Zip
Federal Tax ID Number		Tax Status (Circle one) Corporation, Partnership, Sole	
Primary Management Contact	Phone Number	Email Address	
Secondary Management Contact	Phone Number	Email Address	
Incentive Data Entry Contact	Phone Number	Email Address	
Payee Name		Payee Title	
Check Mailing Address			

## 1. GENERAL PROGRAM INFORMATION

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### Program Description

The TECH Initiative (hereafter referred to as the “Program”) supports the installation of Heat Pump Water Heaters (“HPWH”) and HVAC Heat Pumps (“HP”) in California Gas Corporation Territory. The Program provides incentives to participating contractors for selling qualifying HPWHs and HPs to residential customers residing in a zip code served by a California Gas Corporation.

The Quick Start Grants (QSG) Program is designed to fund localized, vanguard approaches to accelerate deployment of heat pump space and water heating technologies. This allocation of funds is targeted at testing market transformation strategies and approaches, supporting technology development, and leveraging high-impact opportunities to increase the installed base of heat pump technologies.

Cohen Ventures, Inc. dba Energy Solutions (hereinafter referred to as “Energy Solutions” or “Program Implementer”) is implementing the program on behalf of the California Public Utilities Commission (“CPUC”). To participate in the Program and to be eligible for quick start grant funding, all Quick Start Grant Recipients are required to sign this Participation Agreement agreeing to the terms and conditions of participation.

### Program Term

This Agreement is effective upon the date it is executed by Quick Start Grant Recipient and will continue until June 7, 2025 (“Program End Date”) unless earlier terminated in accordance with the provisions in this Agreement. The Program or this Agreement may be modified or terminated by Energy Solutions at any time without notice. Termination of this Agreement or expiration of this Agreement shall not relieve Quick Start Grant Recipient of any warranties or other obligations expressed herein which by their terms are intended to extend beyond termination.

### PROGRAM DEFINITIONS

When used in this Agreement, the following terms, with initial capitalization, have the meanings specified below:

“**Gas Corporation**” refers to any gas investor-owned utility (IOU) active within the State of California. The gas IOUs within California include Pacific Gas & Electric (“PG&E”), Southern California Gas (“SoCal Gas”), San Diego Gas & Electric (“SDG&E”), Southwest Gas (“SW Gas”)

“**Qualifying Customer**” means eligible residential customers that reside in a zip code served by a Gas Corporation that has available Incentives being offered. For a current list of zip codes that contain incentives, please refer to [www.energy-solution.com/tech](http://www.energy-solution.com/tech).

“**Heat Pump Incentive (Incentive)**” means financial reimbursement (e.g., rebates, discounts) paid to Participating Trade Professionals to encourage the installation of HPs and HPWHs. The Incentive for each Qualifying Equipment will be set forth on the Qualifying Equipment List, as such may be modified in accordance with this Agreement.

“**Incentive Application**” refers to the form Participating Trade Professionals must complete and submit to Energy Solutions in order to request reimbursement of Incentives for Qualifying Equipment. The process for submitting an Incentive Application is included in Exhibit A.

**“Participating Trade Professional”** means an entity that participates in any TECH Initiative program. The CPUC at its sole discretion, reserves the right to review and approve if an organization is a Participating Trade Professional.

**“Quick Start Grant Recipient”** refers to the selected awardee of the Quick Start Grant solicitation.

## 2. PROGRAM TERMS OF PARTICIPATION

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### **Term, termination, suspension rights**

Energy Solutions reserves the right to terminate this Agreement or any part of this Agreement for any reason or for no reason in its sole discretion. In the event of such termination, the Quick Start Grant Recipient shall immediately cease participation in the Program, including but not limited to any applicable use of Program materials such as announcement flyers, program website material or any other physical or digital material containing program details.

Energy Solutions reserves the right to terminate this Agreement for cause in the event of any default by the Quick Start Grant Recipient, or if the Quick Start Grant Recipient fails to comply with any of the terms and conditions of this Agreement. In the event of termination for cause, the Quick Start Grant Recipient shall be liable to the Program for any and all damages sustained by reason of the default, which gave rise to termination.

### **Changes to the program**

Energy Solutions may, in its sole discretion, make changes to the Program at any time, including, without limitation, modifying incentive amounts, and adding or removing Qualifying Equipment from the Program. The date of such change(s) will take effect on the earlier of (a) the date the change is posted on the Program website, or (b) the date the Quick Start Grant Recipient receives written notice of such change and will apply to any installations completed on or after the date the change takes effect regardless of date the incentive is applied for. Written notice will generally be provided in email format.

### **3. QUICK START GRANT RECIPIENT TERMS AND REQUIREMENTS**

#### **1.0 Subcontracting**

Quick Start Grant Recipient may use subcontractors to install Qualifying Equipment or provide any services associate with the Quick Start Grant, provided the Quick Start Grant Recipient takes full responsibility for the services provided by their subcontractors. Quick Start Grant Recipient represents and warrants to Energy Solutions, SCE, and CPUC that all of Quick Start Grant Recipient’s subcontractors will perform their services in a professional manner and with the degree of skill and care that is consistent with current, good, and sound professional procedures and practices.

#### **2.0 Confidential Data**

Qualifying Customer account numbers and names are considered confidential data and may not be provided via email. This data may be provided through the TECH Clearinghouse, or if any additional transfer of confidential data is required, Energy Solutions will setup a secure file transfer website for Quick Start Grant Recipient to use to transfer data.

#### **3.0 Marketing Materials.**

Quick Start Grant Recipient shall submit all marketing materials related to the Services being provided to Energy Solutions hereunder to the Energy Solutions Representative for approval prior to their release or communication. Except as provided for herein, Quick Start Grant Recipient shall not use the name or logo of the CPUC on marketing materials for its program unless Quick Start Grant Recipient obtains prior written approval of the CPUC.

Quick Start Grant Recipient shall not use SCE’s, or any Gas Corporation’s, name, trademark, trade name, logo, identity, or any affiliation for any reason or in any way, including on marketing materials, without SCE’s, and, if applicable, such Gas Corporation’s prior written consent, which may be withheld by SCE or such Gas Corporation, if applicable, in its sole discretion. Quick Start Grant Recipient is prohibited from stating, implying or in any way representing to third parties, Customers or program participants that SCE or any Gas Corporation has endorsed or approved Quick Start Grant Recipients, its Subcontractors or their performance of the Services.

Notwithstanding the foregoing, Quick Start Grant Recipient shall disclose their source of funding for the program by stating prominently on marketing materials that the program is “funded by California gas corporation ratepayers under the auspices of the California Public Utilities Commission.”

#### **4.0 Non-Discrimination**

Quick Start Grant Recipient and its subcontractors shall not unlawfully discriminate, harass, or allow harassment against any employee or applicant for employment because of sex, race, color, ancestry, religions creed, national origin, physical disability (including HIV and AIDS), mental disability, medical condition (cancer), age (over 40), marital status, and denial of family care leave. Quick Start Grant Recipient and subcontractors shall ensure that the evaluation and treatment of their employees and applicants for employment are free from such discrimination and harassment.

#### **5.0 Governing Law; Jurisdiction and Venue**



This Agreement will be interpreted under, and any disputes arising out of this Agreement will be governed by, the laws of the State of California, without reference to its conflicts of law principles. Quick Start Grant Recipient irrevocably consents to the jurisdiction of the state and federal courts located in the State of California, USA, in connection with all actions arising out of or in connection with this Agreement, and waives any objections that venue is an inconvenient forum. Quick Start Grant Recipient further agrees that it will not initiate any action against Energy Solutions, CPUC, or SCE in any other jurisdiction.

#### **6.0 Waiver**

Delay or failure to enforce or insist on strict compliance with any provision of this Agreement does not constitute a waiver or otherwise modify this Agreement. Waiver of any right granted under this Agreement on one occasion will not: (i) waive any other right; (ii) constitute a continuing waiver or (iii) waive that right on any other occasion.

#### **7.0 Compensation and Method of Payment**

Energy Solutions will pay Quick Start Grant Recipient the Quick Start Grant on a fixed price basis at the schedule and amounts set forth in the Budget and Payment Sections of the Quick Start Grant solicitation, attached and incorporated herein as Attachment 1. Quick Start Grant Recipient shall be paid in arrears, based upon invoices submitted by Quick Start Grant Recipient, and approved by Energy Solutions and SCE. If a payment schedule sets forth progress payments that are due when given tasks or milestones are completed, the full amount of the progress payment due upon completion of the task or milestone shall then become payable to Quick Start Grant Recipient at that time, without deduction, subject to invoicing and payment timing terms described below. Quick Start Grant payments to Quick Start Grant Recipient will be subject to Energy Solutions first receiving payment from Energy Solutions' client when Energy Solutions is invoicing such work by Quick Start Grant Recipient to such client. Energy Solutions shall pay Quick Start Grant Recipient for all approved invoices within seven (7) business days of receiving payment from such client.

In accordance with the billing schedule set forth in the Budget and Payment Sections of Attachment 1, Quick Start Grant Recipient shall submit to Energy Solutions invoices for payment within seven (7) calendar days of month end. Each invoice shall specify the Quick Start Grant Recipient's payee name, Task Order, and shall specify in detail the final incentive amount and calculation, Services performed, the names of Quick Start Grant's personnel who performed the Services set forth in the Task Order, their respective hours worked and labor rates together with reimbursable costs and other allowable charges itemized. Each invoice shall include the current monthly amount being invoiced, the cumulative amount invoiced to date, the accumulative retained amount, and the total fixed price. Energy Solutions shall review Quick Start Grant Recipient's invoices, and Quick Start Grant Recipient shall provide any supporting documentation reasonably requested by Energy Solutions and make any corrections to invoices as may be requested by Energy Solutions from time to time.

#### **8.0 INDEMNITY**

Quick Start Grant Recipient agrees to indemnify and hold harmless Energy Solutions, SCE, the CPUC, its officers, agents and employees, from and against any and all claims, demands, liabilities, losses or causes of action which arise out of or are connected with this agreement or the equipment excepting only those claims, demands, liabilities, losses, or causes of action arising solely from the negligence of the Energy Solutions, SCE, the CPUC, its officers, agents and employees.

#### **9.0 REGULATORY AND GOVERNING AUTHORITY**

Quick Start Grant Recipient understands and agrees that this Participation Agreement and the Program shall at all times be subject to changes or modifications by the CPUC at its sole discretion. Quick Start Grant Recipient understands and agrees that the CPUC may at any time commence an investigation or other regulatory

proceeding in connection with the Program and/or this Participant Agreement. Quick Start Grant Recipient agrees to cooperate fully with any such investigation or proceeding.

#### **10.0 TAX LIABILITY**

Quick Start Grant Recipient will report grant funding on IRS Form 1099 unless Quick Start Grant Recipient has indicated its tax-exempt corporate tax status above. Quick Start Grant Recipient is encouraged to consult its tax adviser concerning the taxability of incentives. Neither the CPUC nor program implementer are responsible for any taxes, interest, and/or penalties that may be imposed on Quick Start Grant Recipient as a result of receipt of incentives from this program or any other program related cost. Quick Start Grant Recipient assumes all responsibility for collecting and reporting any and all applicable sales tax. Quick Start Grant Recipient acknowledges that at the time of purchase, sales tax must be applied prior to the application of any rebate.

#### **11.0 CONFIDENTIALITY**

Quick Start Grant Recipient acknowledges and agrees that CPUC and Program Implementer have no duty of confidentiality with respect to any information submitted by Quick Start Grant Recipient pursuant to its participation in the Program and that Program Administrator and Program Implementer may disclose such information to the CPUC and SCE. This Program is subject to oversight by the CPUC which may wish to review any Program data that Program Implementer receives. Neither the CPUC, SCE nor Program Implementer will have any liability to Quick Start Grant Recipient or any other party as result of any public disclosure of any data or other materials submitted by Quick Start Grant Recipient pursuant to the Program

#### **12.0 TECH Program Terms and Conditions:**

**Qualifying Equipment:** Qualifying Equipment is limited to those listed at <http://www.energy-solution.com/tech>. Only Qualifying Equipment is eligible to receive Incentives.

**Program Funding:** The Program is funded by California gas corporation ratepayers under the auspices of the California Public Utilities Commission (“CPUC”). Total Program incentive funding is available on a first-come, first-served basis until the funding is depleted or the Program is terminated.

**Cancellation Policy, Requirements, Process, and Any Applicable Fees:** There are no applicable fees for participating in the Program, however, Energy Solutions reserves the right to terminate Agreements with Quick Start Grant Recipient for any reason or for no reason in its sole discretion. This may result in cancellation of incentives.

**Risks and Benefits of Participation:** There are no guaranteed benefits for participating in the Program. Incentives are available on a first come first serve basis and can significantly reduce upfront costs of installations. Installing Qualifying Equipment does not guarantee a certain amount of energy or gas savings. The Program will not assume liability for any unpaid incentives, which may present a risk to the Quick Start Grant Recipient and Qualifying Customer. As part of this Agreement, the Quick Start Grant Recipient acknowledges all risks associated with participating in the TECH initiative.

**Disclosure:** Quick Start Grant Recipient, Energy Solutions, and other third parties associated with the Program are not a representative of SCE or any Gas Corporation or otherwise affiliated with SCE or any Gas Corporation.

**Installation Requirements:** The Program requires that the Qualifying Equipment is installed at an eligible customer address that is in a Gas Corporation territory and that the Qualifying Equipment is installed in place of an existing water heater or furnace, or has controls installed that prevent furnace from operating as the main heating source.

**Quality Assurance and Quality Controls Protocols:** All incentive applications will be subject to automated and manual protocols designed by Energy Solutions to evaluate that equipment and customers are eligible to receive program funding, that equipment replaced an existing system and equipment is in good working order. These processes will be used to identify fraudulent activities and ensure no fraudulent data is submitted in applications.

**Inspections and Verification:** The installation of equipment will be subject to verification by Energy Solutions or its representatives. Verification (including onsite inspections at customer address) may be performed per Energy Solutions requirements on all equipment listed, or a select portion of the equipment.

**Notice:** California Consumers are not obligated to purchase any full fee service or other service not funded by the Program. The Program is funded by California Gas Corporation ratepayers and administered by Southern California Edison Company under the auspices of the California Public Utilities Commission. Any data related to the Program, including any customer data, will be shared with authorized entities, including but not limited to, policy makers, program implementers, and the program evaluator under confidentiality protocols. As this data will not be made public and will follow the confidentiality rules and protocols established by the CPUC in prior proceedings, it does not require individual customer permission.

By signing below, Quick Start Grant Recipient agrees to be bound by the terms and conditions of this Agreement, including(if applicable) all associated Exhibits and Appendices, and has caused this Agreement to be executed by its duly authorized representative.

Quick Start Grant Recipient Signature

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Title

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Print Name

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Date

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