

TECH Quick Start Grant Participation Agreement

Quick Start Grant Recipient Information

Company Name (“Quick Start Grant Applicant”): San Francisco Environment Department			
Parent Company Name (if applicable): City and County of San Francisco			
Company Name to be Included on Public Listing (if different than Company Name above): N/A			
Street Address: 1455 Market Street, Suite 13A	City: San Francisco	State: CA	Zip: 94103
Mailing Address (if different from above): N/A	City: N/A	State: N/A	Zip: N/A
Federal Tax ID Number: 94-6000417		Tax Status (Circle one): Corporation, Partnership, Sole Proprietor, Tax-exempt, <u>Municipality</u>	
Contractor License #: N/A			
Primary Program Contact: Lowell Chu	Title: Principal Environmental Specialist	Phone Number: (415) 355-3738	Email Address: lowell.chu@sfgov.org
Mobile Number for Primary Program Contact: N/A		Do you want to opt-in to receive any TECH Clean California text using this mobile number?* (Circle One): Yes <u>No</u>	
Secondary Program Contact: Benny Zank	Title: Environmental Specialist	Phone Number: (415) 355-3740	Email Address: benny.zank@sfgov.org
Mobile Number for Secondary Program Contact: N/A		Do you want to opt-in to receive any TECH Clean California text using this mobile number?* (Circle One): Yes <u>No</u>	
Incentive Data Entry Contact: N/A	Title: N/A	Phone Number: N/A	Email Address: N/A

Mobile Number for Data Entry Contact: N/A	Do you want to opt-in to receive any TECH Clean California text using this mobile number?* (Circle One): Yes <u>No</u>
Payee Name: San Francisco Environment Department	Payee Title: N/A
Check Mailing Address: Attention: Mr. Mark Brown, Fiscal Manager San Francisco Environment Department 1455 Market Street, Suite 13A San Francisco, CA 94103	
What Sector do you serve? (Circle one): Single-family Multifamily <u>Both</u>	What counties do you primarily serve? (List all): San Francisco

* Please note that for Quick Start Grantee Applicants opting into receiving mobile text messages, they may opt out manually after receiving the first text message.

This TECH Quick Start Grant Participation Agreement (“Agreement”) issued by and between Cohen Ventures, Inc., dba Energy Solutions (“Energy Solutions”), and San Francisco Environment Department, a California municipality (“Quick Start Grant Recipient” or “Grantee”) is made effective upon signature by Grantee. Capitalized terms not otherwise defined herein shall have the meanings given to them in the Agreement.

Grantee will provide its services to Energy Solutions on the following project:

Project Name:	Family Childcare Electrification (the “Project”)
TECH QSG Project Coordinator(s):	Alison Seel, VEIC aseel@veic.org Michael Greco, Energy Solutions mgreco@energy-solution.com
Quick Start Grant Recipient Project Coordinator:	Benny Zank 415-355-3740 benny.zank@sfgov.org

Program Description

The TECH Clean California initiative (hereafter referred to as the “Program”) provides incentives for the installation of qualifying HVAC heat pumps (“HVAC Heat Pumps”) and Heat Pump Water Heaters (“HPWH”), and other eligible equipment at qualifying customer (“Customer”) sites. The Customer is defined as the person or party whose name is on the invoice and/or project agreement.

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 (“Energy Solutions”) is implementing the Program on behalf of the Southern California Edison Company (“SCE”), which is administering the Program at the direction of the California Public Utilities Commission (“CPUC”).

Program Term

This Agreement is effective upon the date it is executed by Quick Start Grant Recipient and will continue until March 31, 2027 (“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:

“Heat Pump Incentive (Incentive)” means financial reimbursement (e.g. rebates, discounts) to Quick Start Grant Recipient paid pursuant to this Agreement to encourage the installation of HVAC Heat Pumps 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.

“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.

“Qualifying Customer” means a California resident that is eligible for available Incentives.

“Qualifying Equipment” means equipment that is eligible for Incentives. Qualifying Equipment is limited to equipment included on the Qualified Equipment List.

“Qualifying Equipment List” The list of Qualifying Equipment that is eligible for Incentives.

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

“Services” refer to the activities included in the Statement of Work (see Exhibit A) that will be performed by the Quick Start Grant Recipient.

PROGRAM TERMS OF PARTICIPATION

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 will not pay Quick Start Grant Recipient incentives for any Applications dated and submitted or grant funding for work performed after receipt of notice of termination or for any costs incurred by the Quick Start Grant Recipient post-termination.

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. Examples of cause include but are not limited to (a) failure to properly complete incentive forms; (b) failure to properly process

incentives; (c) loss of certifications necessary for participation in the Program, insolvency; or (d) failure to provide Energy Solutions reasonable assurances of future performance. If terminated for cause, the Quick Start Grant Recipient (1) shall be liable for all damages resulting from the default that led to termination and (2) shall immediately cease participation in the Program.

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 the date the incentive is applied for. Written notice will generally be provided in email format.

QUICK START GRANT RECIPIENT TERMS AND REQUIREMENTS

1.0 Subcontracting

Quick Start Grant Recipient may use subcontractors to install Qualifying Equipment or perform services specified in the Statement of Work, 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 names, utility account numbers and utility billing data 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. Quick Start Grant Recipient is solely responsible for the secure storage of confidential information in its possession that is collected for the submission of incentive claims. Quick Start Grant Recipient must destroy any customer utility account numbers and utility billing data in its possession no later than the date of the incentive payment clearing for the incentive submission in question, or 12 months, whichever is lesser.

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, name, trademark, trade name, logo, identity, or any affiliation for any reason or in any way, including on marketing materials, without SCE's prior written consent, which may be withheld by SCE, 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 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 "Funding for this project is part of California Climate Investments, a statewide initiative that puts billions of Cap-and-Invest dollars to work reducing greenhouse gas emissions, strengthening the economy, and improving public health and the environment — particularly in disadvantaged communities."

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 or CPUC 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 Exhibit A. 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 SCE when Energy Solutions is invoicing such work by Quick Start Grant Recipient to SCE. Energy Solutions shall pay Quick Start Grant Recipient for all approved invoices within seven (7) business days of receiving payment from SCE.

In accordance with the billing schedule set forth in the Budget and Payment Sections of Exhibit A, Quick Start Grant Recipient shall submit to Energy Solutions invoices for payment within seven (7) calendar days of month's 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 cumulative 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. If the Quick Start Grant Recipient receives the first fixed-price milestone payment for the "project start" milestone but fails to perform any additional Services under the Statement of Work, Energy Solutions may, in its reasonable discretion, require the Quick Start Grant Recipient to refund the full amount of that milestone payment.

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 Energy Solutions, SCE, the CPUC, its officers, agents and employees.

9.0 REGULATORY AND GOVERNING AUTHORITY

Quick Start Grant Recipient understands and agrees to these terms and conditions 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 these terms and conditions. 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. Quick Start Grant Recipient is encouraged to consult its tax adviser concerning the taxability of incentives. Neither the CPUC nor Energy Solutions 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.

Energy Solutions may report incentives that Quick Start Grant Recipient claims as income to Payee on IRS Form 1099 depending on their tax status indicated.

CONFIDENTIALITY

Quick Start Grant Recipient acknowledges and agrees that CPUC and Energy Solutions 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 CPUC, SCE, Energy Solutions, and its subcontractors may disclose such information to the CPUC, SCE and/or their authorized agents. This Program is subject to oversight by the CPUC which may wish to review any Program data that Energy Solutions receives. Neither the CPUC, SCE nor Energy Solutions 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. The Quick Start Grant Recipient must follow all applicable laws and regulations for the protection of data that is deemed confidential.

11.0 TECH Program Terms and Conditions:

Participating Trade Professional Agreement with Customer

To be eligible for incentives under this Agreement, the Quick Start Grant Recipient must enroll in the Program as a Participating Trade Professional and must enter into an agreement with each Qualifying Customer that is receiving an incentivized product (“Customer Agreement”). This Customer Agreement must include the following: i) Participating Trade Professional’s company

name and ultimate parent, and ii) Participating Trade Professional's customer service contact information (phone number and email).

Qualifying Equipment: Only Qualifying Equipment, limited to the equipment listed at [frontierenergy-tech.my.site.com/contractor support/s](http://frontierenergy-tech.my.site.com/contractor%20support/s), is eligible for the receipt of Program incentives.

Program Funding: The Quick Start Grant Program is part of California Climate Investments, a statewide program that puts billions of Cap-and-Invest dollars to work reducing GHG emissions, strengthening the economy, and improving public health and the environment— particularly in disadvantaged communities. The Cap-and-Invest program also creates a financial incentive for industries to invest in clean technologies and develop innovative ways to reduce pollution. California Climate Investments projects include affordable housing, renewable energy, public transportation, zero-emission vehicles, environmental restoration, more sustainable agriculture, recycling, and much more. At least 35 percent of these investments are located within and benefiting residents of disadvantaged communities, low-income communities, and low-income households across California. For more information, visit the California Climate Investments website at: www.caclimateinvestments.ca.gov. Both total and certain segments of Program incentive funding are subject to certain limits and available on a first-come, first-served basis until the funding is exhausted or the Program is terminated.

Cancellation Policy, Requirements, Process, and Any Applicable Fees: There are no applicable fees for participating in the Program. Energy Solutions reserves the right to terminate any Agreement with any Participating Trade Professional for any reason or for no reason in its sole discretion. This may result in cancellation of pending 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 Participating Trade Professional and Qualifying Customer. As part of this Agreement, the Participating Trade Professional acknowledges all risks associated with participating in the TECH initiative. By signing below, you acknowledge and accept all risks associated with participating in the Program.

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

Installation Requirements: The Program requires that the Qualifying Equipment is installed at an eligible customer address that is in California 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 Services performed 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 and metering by Energy Solutions, its representatives and Program evaluators, as approved by CPUC. Verification, evaluation (including onsite inspections at your address), and metering may be performed on all Qualifying Equipment or a select portion thereof. Evaluation activities may include surveys and interviews of contractors, homeowners and/or occupants to understand equipment performance and the Program experience.

Notice: California Consumers are not obligated to purchase any full fee service or other service not funded by the Program. This program is funded by the California Climate Investments and administered and implemented by Energy Solutions through a contract with Southern California Edison Company on behalf of various California utilities and under the auspices of the California Public Utilities Commission (“CPUC”). 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 Exhibit A (Statement of Work) and any other associated Exhibits and Appendices, and has caused this Agreement to be executed by its duly authorized representative.

IN WITNESS WHEREOF, THE QUICK START GRANT RECCIPIENT EXECUTED THIS AGREEMENT AS OF THE EFFECTIVE DATE. THE INDIVIDUAL SIGNING BELOW ON BEHALF OF THE PARTY HEREBY REPRESENT AND WARRANT THAT THEY ARE DULY AUTHORIZED TO EXECUTE THIS AGREEMENT AND BIND THEIR RESPECTIVE PARTY TO THE TERMS AND CONDITIONS SET FORTH ABOVE.

[Signatures on following page]

ENERGY SOLUTIONS:

Signed by:
Jessica Kramer
99FE4C3DD74A44D...
By: Jessica Kramer
Title: Sr. Director
Date: 1/26/2026 | 12:59 PM PST

QUICK START GRANT RECIPIENT:

DocuSigned by:
Tyrone Jue
3D5889F7A5C140C...
By: Tyrone Jue
Title: Director
Date: 1/27/2026 | 4:37 PM PST

APPROVED AS TO FORM:

DocuSigned by:
Sarah Crowley
9F75C40AD66342F...
By: Sarah Crowley
Title: Deputy San Francisco City Attorney
Date: 1/29/2026 | 10:18 AM PST

EXHIBIT A: STATEMENT OF WORK

Quick Start Grant Background

San Francisco Environment Department (“SFE” or “Grantee”) will work with the Low-Income Investment Fund (“LIIF”) on a pilot effort to install HPWHs in up to 30 family childcare provider facilities in San Francisco that have, or will receive, renovation and repairs through LIIF’s Child Care Facilities Fund program. The Project will:

- Complete heat pump installations in residential-based family childcare facilities.
- Design a standard heat pump fuel substitution measure into the LIIF Family Child Care Renovation and Repair Grant Program.
- Remove the financial risk and incentivize contractors to become trained on heat pump technology, and demonstrate the scalability of this contractor approach.
- Share findings across a wide variety of renovation and repair programs to encourage the adoption of heat pump fuel substitution measures and with building decarbonization programs to deepen and understanding of repair and renovation needs.

Statement of Work

Under this Statement of Work, the Grantee shall complete the following activities:

01-Reporting & Coordination

The TECH Clean California Quick Start Grant (“QSG”) Energy Solutions and VEIC team will host a kickoff meeting with the Quick Start Grant Recipient. During this meeting, the procedures, requirements for reporting, and invoicing guidelines for the Quick Start Grant Recipient to adhere to will be reviewed, as well as TECH’s reporting responsibilities to the California Public Utilities Commission (“CPUC”).

Following the kickoff meeting, the Quick Start Grant Recipient will participate in monthly meetings with the TECH QSG Project Coordinators to facilitate coordination within TECH workstreams, discuss Project findings and recommendations, and make strategic adjustments throughout the Project. The Quick Start Grant Recipient will also provide brief monthly updates to the TECH QSG Project Coordinators via Excel document in preparation for and during these monthly meetings.

The Quick Start Grant Recipient will demonstrate successful completion of each Project milestone to be eligible for payment, as described in the Compensation and Payment Terms below and will submit documentation of milestone achievement with their invoice using a template provided by the TECH QSG Project Coordinators. Any changes to milestones or deadlines will be mutually agreed upon between the TECH QSG Project Coordinators and the Quick Start Grant Recipient

via email. Tracking toward project key performance indicators (“KPIs”) and cost sharing will also be reported within the milestone invoices.

The Quick Start Grant Recipient will prepare a Final Report in the form of a written report and a slide deck to be presented during a public webinar. This Final Report will at a minimum summarize the Project approach and lessons learned through the project, evaluate the Project against the proposed KPIs, provide high-level recommendations for future work, and identify proposed strategies to scale the Project. A draft of the written report and slide deck will be provided to the TECH QSG Project Coordinators at least one (1) month before the Project end date for input. The Final Report and slide deck will be completed before the end of the SOW and may be shared publicly via Energy Solutions on the TECH website.

01 - Meetings, Reporting & Coordination Activities

- 1) Kickoff, monthly, and ad hoc Meetings:
 - a) Grantee will participate in a kickoff meeting and monthly coordination meetings with the TECH QSG Project Coordinator(s) to facilitate coordination within TECH workstreams, discuss Project findings and recommendations, and make strategic adjustments throughout the Project.
 - i) The kickoff meeting will be scheduled to occur within two (2) weeks of Agreement execution.
 - (1) After the kickoff meeting, Grantee will submit to the TECH QSG Project Coordinator(s) the associated Milestone Report 1 which shall summarize what was discussed, provide detailed information as it relates to the activities that Grantee will perform pursuant to the Project, and provide responses to any questions posed by the TECH QSG Project Coordinator(s) regarding the Project.
 - ii) Monthly coordination meetings will be scheduled by the Grantee and TECH QSG Project Coordinator to occur at a mutually agreeable time.
 - b) VEIC will bring all Quick Start Grant Projects together on a quarterly basis for a two (2)-hour virtual meeting. The Quick Start Grant recipient will make its best effort to attend all quarterly meetings. The Quick Start Grant recipient may be asked to:
 - i) Propose agenda items for the quarterly meetings
 - ii) Present its Project and associated challenges and results during these events.
- 2) Draft Reporting and Completion of Deliverable Milestones
 - a) Grantee will prepare a Draft Report in the form of a written report. This Draft Report will include, at minimum, preliminary results and recommendations based on Project implementation, plus background information including the Project approach, theory of change, and research questions.
 - b) Grantee will demonstrate successful completion of each Deliverable milestone to be eligible for payment, as described below, and submit documentation of milestone achievements in the form of a “Milestone Report” with the invoice for payment using a template provided by Energy Solutions.
 - c) If Grantee is installing equipment, Grantee will prepare project installation data that aligns with TECH Clean California’s dataset for additional analysis and reporting

where possible, consistent with customer confidentiality, data sensitivity, and availability.

3) Final Report:

- a) Grantee will prepare a Final Report in the form of a written report. This Final Report will, at a minimum, summarize the Project approach and lessons learned through the project, evaluate the Project against the proposed KPIs, provide high-level recommendations for future work, and identify proposed strategies to scale the Project. The Final Report may be shared publicly via Energy Solutions on the TECH website.
- b) Grantee will prepare a Slide Deck summarizing Project implementation and lessons learned through the Project. A draft of the slide deck will be provided to the TECH Project Coordinators at least one (1) month before the Project conclusion for input. After VEIC and Energy Solutions have approved the slide deck, Grantee will present at a public webinar hosted by the TECH program. The final version of the Slide Deck may be shared publicly via Energy Solutions on the TECH website.

02-Contractor Recruitment and training

Grantee will oversee the recruitment and training of contractors to participate in the Project. Grantee will provide training and installation opportunities to contractors that are already completing like-for-like appliance replacements, but are unfamiliar with fuel substitution and heat pumps. Completion of this task will be determined by delivery of documentation for activities listed below in the form of a “Milestone Report” as reviewed and approved by the TECH QSG Project Coordinator(s).

Activities that Grantee will complete:

- 1) Recruit ten (10) contractors
 - a) SFE will invite contractors that have participated in LIIF Family Child Care program, Electrification Contractor Academy graduates, and SFE Climate Equity Hub (“CEH”) participating contractors to participate in the pilot.
 - b) Responsible for completing Activities – SFE
 - c) Due – January 31st, 2026
 - d) Responsible for ensuring Activities were satisfactorily completed – SFE
 - e) Deliverable – Spreadsheet of contractor outreach and Project recruitment status.
- 2) Hold one (1) – two (2) orientation meetings
 - a) Orientation meeting for participating contractors (collectively referred to herein as “Contractors”) where Grantee will provide an overview of LIIF Renovation and Repair program, San Francisco (“SF”) Climate Equity Hub, pilot initiative, best practices for heat pump water heater (“HPWH”) installation and program requirements, including but not limited to enrolling as TECH Participating Trade Professional.
 - b) Responsible for completing Activities – SFE
 - c) Due – February 28th, 2026
 - d) Responsible for ensuring Activities were satisfactorily completed – SFE
 - e) Deliverable – Orientation slides, notes, and list of attendance

- 3) Confirm that Contractors new to HPWHs complete certification/training
 - a) Recruited Contractors that have attested they have not installed HPWHs before (referred to herein as “New Contractors”) need to complete HPWH installation training/certification. This includes enrollment as a TECH Participating Trade Professional and completing either a Department of Energy (“DOE”) [Energy Skilled HPWH Programs](#) or Bay Area Regional Energy Network (“BayREN”) HPWH training for contractors. SFE will provide support to help Contractors complete enrollment and training and provide a \$500 stipend for doing so.
 - b) Responsible for completing Activities – SFE
 - c) Due – March 31st, 2026
 - d) Responsible for ensuring Activities were satisfactorily completed – SFE
 - e) Deliverable – Contractor documentation of prior installations or lack thereof, training certificates, and receipts of stipends provided.

- 4) Provide installation shadowing opportunities
 - a) New Contractors will attend live installations from recruited veteran Contractors with heat pump installation experience (referred to herein as “Veteran Contractors”) to complete their preliminary training. Installation shadowing opportunities provided through first set of five (5) – ten (10) pilot projects that shall be completed under Task 4 below, with a \$250 stipend provided by SFE for New Contractors and \$500 stipend for Veteran Contractors.
 - b) Responsible for completing Activities – SFE
 - c) Due – March 31st, 2026
 - d) Responsible for ensuring Activities were satisfactorily completed – SFE
 - e) Deliverable – List of Contractor shadowing opportunities/pairings, installation documentation & verification, and receipts of stipends provided.

03-Family Childcare Provider Recruitment and Assessment

Grantee will conduct outreach to existing childcare grant recipients and new grant applicants to enroll up to 30 qualifying childcare facilities interested in the pilot initiative offered under this Project. Completion of this task will be determined by delivery of documentation for activities listed below in the form of a “Milestone Report” as reviewed and approved by the TECH QSG Project Coordinator(s).

Activities that Grantee will complete:

- 1) Outreach and Recruitment of up to 30 Family Child Care Providers
 - a) LIIF to reach out to childcare providers that have already received renovation and repair upgrades, those in active project development, and those applying for grants to recruit up to 30 qualifying childcare facilities (the “Participating Facilities”) interested in the pilot initiative provided through this Project.
 - b) Responsible for completing Activities – LIIF, supported by SFE
 - c) Due – April 15th, 2026
 - d) Responsible for ensuring Activities were satisfactorily completed – SFE
 - e) Deliverable – Childcare facility outreach documentation, Participating Facility enrollment agreements

- 2) Host one (1) – two (2) Orientation Workshops for Family Child Care Providers
 - a) LIIF will host at least one (1) workshop for the cohort of interested childcare providers where SFE will give an overview of the benefits of electrification and the pilot initiative offering through this Project.
 - b) Responsible for completing Activities – LIIF, supported by SFE
 - c) Due – March 15th, 2026
 - d) Responsible for ensuring Activities were satisfactorily completed – SFE
 - e) Deliverable – Orientation slides, notes, and list of attendance

- 3) Complete up to 30 Assessments at Family Child Care Facilities
 - a) SFE & LIIF staff will complete assessments at Participating Facilities to identify heat pump water heater scope and identify other opportunities for electrification and energy efficiency.
 - b) Responsible for completing Activities – SFE
 - c) Due – April 30th, 2026
 - d) Responsible for ensuring Activities were satisfactorily completed – SFE
 - e) Deliverable – Assessment reports of Participating Facility needs and energy efficiency measures

04-HPWH Installations

Grantee will oversee the completion of up to 30 heat pump installations in Participating Facilities. Installations will be segmented to provide shadowing opportunities for New Contractors. Grantee will collect baseline information on fuel substitution measures, including cost, feasibility for scaling, and Participating Facility and Contractor satisfaction to create a standard product offering that renovation and repair programs can integrate into their existing offerings. Completion of this task will be determined by delivery of documentation for activities listed below in the form of a “Milestone Report” as reviewed and approved by the TECH QSG Project Coordinator(s).

Activities that Grantee will complete:

- 1) Confirm completion of the first cohort of installations
 - a) First heat pump installations (five (5) to ten (10)) completed by Veteran Contractors that New Contractors can shadow and learn from.
 - b) Responsible for completing Activities: – SFE
 - c) Due – March 31st, 2026
 - d) Responsible for ensuring Activities were satisfactorily completed – SFE
 - e) Deliverable – List of Contractor shadowing opportunities/pairings, installation documentation & verification, and receipts of stipends provided.

- 2) Confirm completion of the second cohort of installations
 - a) Second HPWH installs (five (5) – ten (10)) completed by Veteran Contractors and New Contractors.
 - b) Responsible for completing Activities – SFE
 - c) Due – May 30th, 2026
 - d) Responsible for ensuring Activities were satisfactorily completed – SFE
 - e) Deliverable – Installation documentation & verification, list of installations completed by Veteran Contractors and New Contractors.

- 3) Confirm completion of the third cohort of installations
 - a) Third HPWH installs (totaling 30 for the whole Project) that primarily New Contractors who shadowed in the first cohort rounds complete. If there is grant funding remaining for additional HPWH installs, SFE will use funds to complete additional installations.
 - b) Responsible for completing Activities – SFE
 - c) Due – October 30st, 2026
 - d) Responsible for ensuring Activities were satisfactorily completed – SFE
 - e) Deliverable – Installation documentation & verification, list of installations completed by New Contractors, Veteran Contractors can complete installations at SFE’s discretion.

05-Data Collection

Grantee shall collect data supportive of demonstrating the impact of New Contractor training and shadowing opportunities on subsequent comfort and promotion of heat pump technologies by Contractors. Grantee will also collect data on the viability of heat pumps as an integral offering in a renovation and repair approach and influence other programs to adopt it as a standard offering. Data collection will also identify best practices for family child care providers operating in residential facilities to adopt heat pump technology. Completion of this task will be determined by delivery of documentation for activities listed below in the form of a “Milestone Report” as reviewed and approved by the TECH QSG Project Coordinator(s).

Activities that Grantee will complete:

- 1) Create participation surveys
 - a) Create Contractor and Participating Facility participation surveys to get feedback on the pilot initiative, the viability of scaling this contractor training model and provider satisfaction with heat pump water heaters.
 - b) Responsible for completing Activities – SFE
 - c) Due – March 31st
 - d) Responsible for ensuring Activities were satisfactorily completed – SFE
 - e) Deliverable – Surveys for Contractors and Participating Facilities

- 2) Collect feedback from Project participants
 - a) Administering Contractor and Participating Facility participation surveys; review of Participating Facilities’ energy bills; signing Participating Facilities up for CleanPowerSF bill credit program and other post-installation program opportunities.
 - b) Responsible for completing Activities – SFE
 - c) Due – November 30th, 2026
 - d) Responsible for ensuring Activities were satisfactorily completed – SFE
 - e) Deliverable – Results from Contractor and Participating Facility participation surveys, analysis of Participating Facilities’ energy bills, evidence of enrollments in CleanPowerSF bill credit program, and summary of other post-installation program opportunities pursued.

Deliverables

The deliverables for this Project are outlined below: Grantee shall submit each Deliverable to Energy Solutions by the stated due date in Table 2 below unless otherwise mutually agreed upon in writing by the Parties in advance.

1. **“Milestone Reports”** which will include documentation of milestone achievement;
2. **“Draft Report”** which will include project background, project approach and theory of change, and preliminary results and recommendations;
3. **“Final Report”** which will include all sections of the Draft Report updated to include an executive summary and final results and recommendations. Final report will be reviewed and potentially iterated on with Energy Solutions and VEIC prior to finalization;
4. **“Slide Deck & Webinar”** which will summarize Final Report content for a public audience and presented at public webinar; and
5. **“Distribution Report”** which will share the approach and activities to distribute the information gained during the project.

Grantee will ensure that all activities outlined in this SOW and associated Milestone Report(s) are satisfactorily met.

Table 2: Deliverable Due Dates

Deliverable	Due Date
Milestone Reports	Upon Milestone completion
Draft Report	December 31, 2026
Final Report	March 31, 2027
Slide Deck and Present at Webinar	March 31, 2027
Distribution Report	March 31, 2027

Schedule

To begin as of the Effective Date and continue until March 31, 2027, or until terminated by either Party as set forth in the Agreement.

Compensation and Payment Terms

The Services performed under this SOW shall be billed on a fixed price milestone (“FP”) basis as determined by the schedule set forth in Table 2 above and pursuant to Section 7 of the Agreement. Payment is contingent upon approval of each Deliverable by Energy Solutions and VEIC. Invoices shall be submitted by Grantee by the tenth (10th) day of the month following Energy Solutions’ written approval of the Deliverable.

Table 3: Payment Milestones

Milestone Deliverable	Percentage of Total Budget	Total Milestone Payment (\$)
Milestone Report 1: Kick Off Meeting	7%	\$20,000
Milestone Report 2: Contractor & first family childcare provider recruitment	7%	\$20,000
Milestone Report 3: First Family Childcare Facility site Assessments	13%	\$40,000
Milestone Report 4: First cohort of installs & second recruitment of providers. Contractor self-directed certification & shadowing	17%	\$50,000
Milestone Report 5: Second cohort of site assessments	13%	\$40,000
Milestone Report 6: Second cohort of installs and third recruitment of providers.	22%	\$65,000
Milestone Report 7: Third cohort of site assessments	12%	\$35,000
Milestone Report 8: Third cohort of installs	7%	\$20,000
Milestone Report 9: Data collection	2%	\$5,000
Milestone Report 10: Reporting, including Draft Report, Final Report, Slide Deck, Webinar, and Distribution Report	1%	\$4,091
Total		\$ 299,091

Grantee shall notify the TECH QSG Project Coordinators when the charges incurred under this Task Order reach 75% of the Total Budget. If at any time Grantee estimates that the work, as authorized by this SOW, cannot be completed within the Schedule and/or Total Budget, Grantee shall promptly notify the TECH QSG Project Coordinators and shall submit a revised and substantiated estimate. Upon receipt of the revised estimate, Energy Solutions shall review and determine in its sole discretion if issuing a Change Order is appropriate. Absent a Change Order signed by the Parties, Grantee shall not proceed with, or be reimbursed for, any work performed beyond the end date or exceeding the Total Budget of this SOW.

Reimbursable Costs

Any costs incurred by the Project, including equipment and subcontractors are presumed to be included in the total cost set forth by Grantee in this SOW. There are no reimbursable costs associated with the scope of work outlined above.

Scope of Work Budget

Grantee's total invoicing, including expenses, as set forth above, under this SOW shall not exceed the Total Budget of \$299,091.

Subcontractors

Pursuant to the terms outlined in Section 1 "Subcontracting" of the Agreement, the Grantee is permitted to use the below Subcontractor(s) in the performance of the services defined herein. Any additional Subcontractors not defined below must receive prior written approval from the TECH QSG Project Coordinators before proceeding with any work as defined in the Statement of Work. The Parties agree that such requests for approval may be delivered via email. The Grantee represents and warrants to Energy Solutions that the Grantee and any approved Subcontractors will perform its 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.

Approved Subcontractor(s):

- None

Participating Trade Professionals

For any Project that results in an installation of Qualifying Equipment for a Qualifying Customer, Quick Start Grant recipient will require the installing contractor to enroll in the TECH program as a "Participating Trade Professional(s)" prior to working on the Project and installing any Qualifying Equipment. As a part of the enrollment process into the TECH program, the installing contractor shall sign and maintain the requirements set forth in the Trade Professional Participation Agreement, which shall be provided to Quick Start Grant Recipient by Energy Solutions.