Rebuilding Together East Bay Network

Just Transition Residential Electrification Pilot Program

Climate Coach Home Visit Workbook (Appendix II.A)

Documentation. This workbook is the coach-facing core of the Climate Coach binder, redesigned for publication. The external inserts referenced throughout (sample PG&E bill, CARE/FERA online application guide, Medical Baseline application guide, REACH application guide) travel behind it as attachments. Program rules, discounts, and income limits change; confirm figures against current utility and CPUC guidance before each training cycle [update annually].

Purpose and How to Use This Workbook

A Climate Coach is a trained neighbor. The visit exists to walk a household through its energy bills, enroll it in every discount and assistance program it qualifies for, and introduce the Just Transition electrification offer. In our experience, many of the neighbors coaches visit are eligible for one or more programs they have never enrolled in, because each program carries its own eligibility rules, application, and renewal cycle. A single visit that handles all of them at once is the fastest way a household can start saving.

The visit follows six steps, in order. The order matters, because each step delivers something the household can verify before the next one asks for more trust.

1. Welcome and introductions, including consent to discuss finances and general medical information.
2. PG&E bill review.
3. CARE / FERA screening and enrollment or renewal.
4. Medical Baseline screening.
5. LIHEAP / REACH bill assistance.
6. Just Transition / energy efficiency introduction.

Visit Record

Fill in the boxes below over the course of the visit. Where a program name appears in parentheses, you can capture that item during that section of the visit.

Neighbor name	
Neighbor address	
Neighbor phone number	
Climate Coach name	

Posted 9/15/26

Coach contact info	
Visit date	
Household resident total	
Household income bracket	
PG&E account number (PG&E Bill)	
Programs already enrolled in (PG&E Bill)	
Past-due balance (PG&E Bill)	
Medical appliances and/or conditions (Medical Baseline)	

Boundary. Coaches record what the homeowner chooses to share and never keep copies of financial or medical documents. Anything beyond the boxes above gets referred to staff.

Step 1. Welcome and Introductions

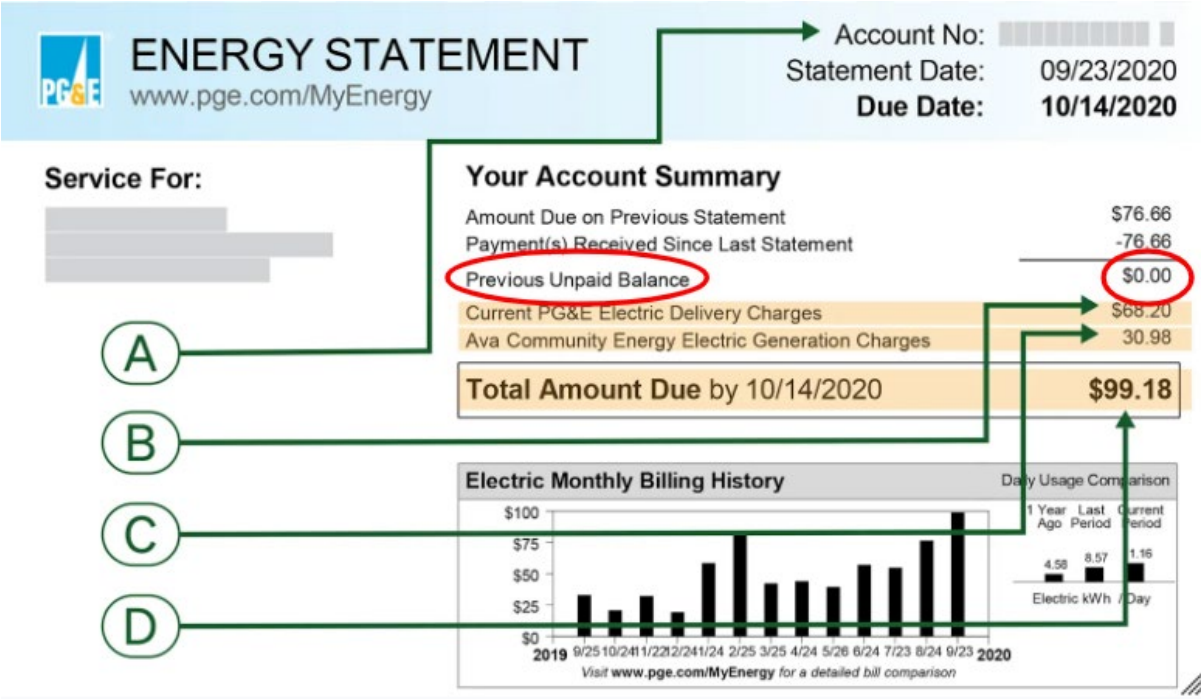
You have arrived at your neighbor's house and are getting ready to have a successful home visit. Stay calm, courteous, friendly, and warm.

- Introduce yourself and give a basic outline of what the homeowner can expect during the visit.
- Mention that there will be discussion of finances and general medical information, and that it is fine if they are not comfortable discussing these topics with you.
- If they would prefer to speak with a medical professional, refer them to RTEBN's clinician [confirm current contact].
- Explain the aim plainly: many qualified households are not enrolled in the money-saving programs available to them, and this visit gets every one they qualify for working for them.

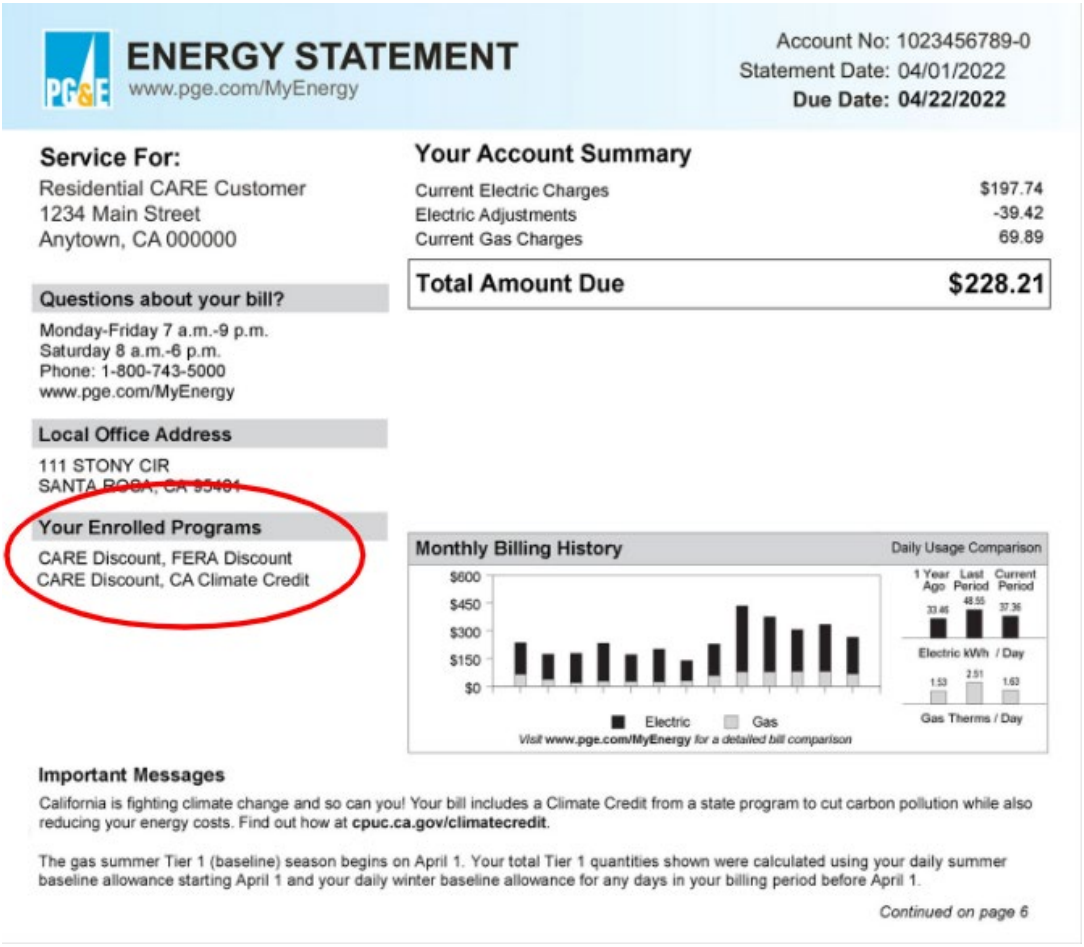
Step 2. PG&E Bill Review

Ask to look at a recent bill together. Check for four things and record them in the Visit Record.

- The account number, which is needed for any changes to service or program enrollment.
- The rate schedule. Homeowners on Renewable 100 have the option of switching to Bright Choice for a more affordable product; the rate line shows the base schedule (commonly E1 or TOU-C) followed by the Ava service.
- Programs the household is already enrolled in, shown under 'Your Enrolled Programs' on the first page. If a program is already active, you do not need to pitch it.
- Any unpaid balance. A past-due balance of up to $2,000 may qualify the household for REACH assistance (Step 5).



Bill page one. A: account number. Red circle: previous unpaid balance. B-D: total amount due and billing history.



ENERGY STATEMENT
www.pge.com/MyEnergy

Account No: 1023456789-0
Statement Date: 04/01/2022
Due Date: 04/22/2022

Service For:
Residential CARE Customer
1234 Main Street
Anytown, CA 000000

Your Account Summary

Current Electric Charges	$197.74
Electric Adjustments	-39.42
Current Gas Charges	69.89
Total Amount Due	**$228.21**

Questions about your bill?
Monday-Friday 7 a.m.-9 p.m.
Saturday 8 a.m.-6 p.m.
Phone: 1-800-743-5000
www.pge.com/MyEnergy

Local Office Address
111 STONY CIR
SANTA ROSA, CA 95401

Your Enrolled Programs
CARE Discount, FERA Discount
CARE Discount, CA Climate Credit

Monthly Billing History
$600
$450
$300
$150
$0
Electric
Gas
Visit www.pge.com/MyEnergy for a detailed bill comparison

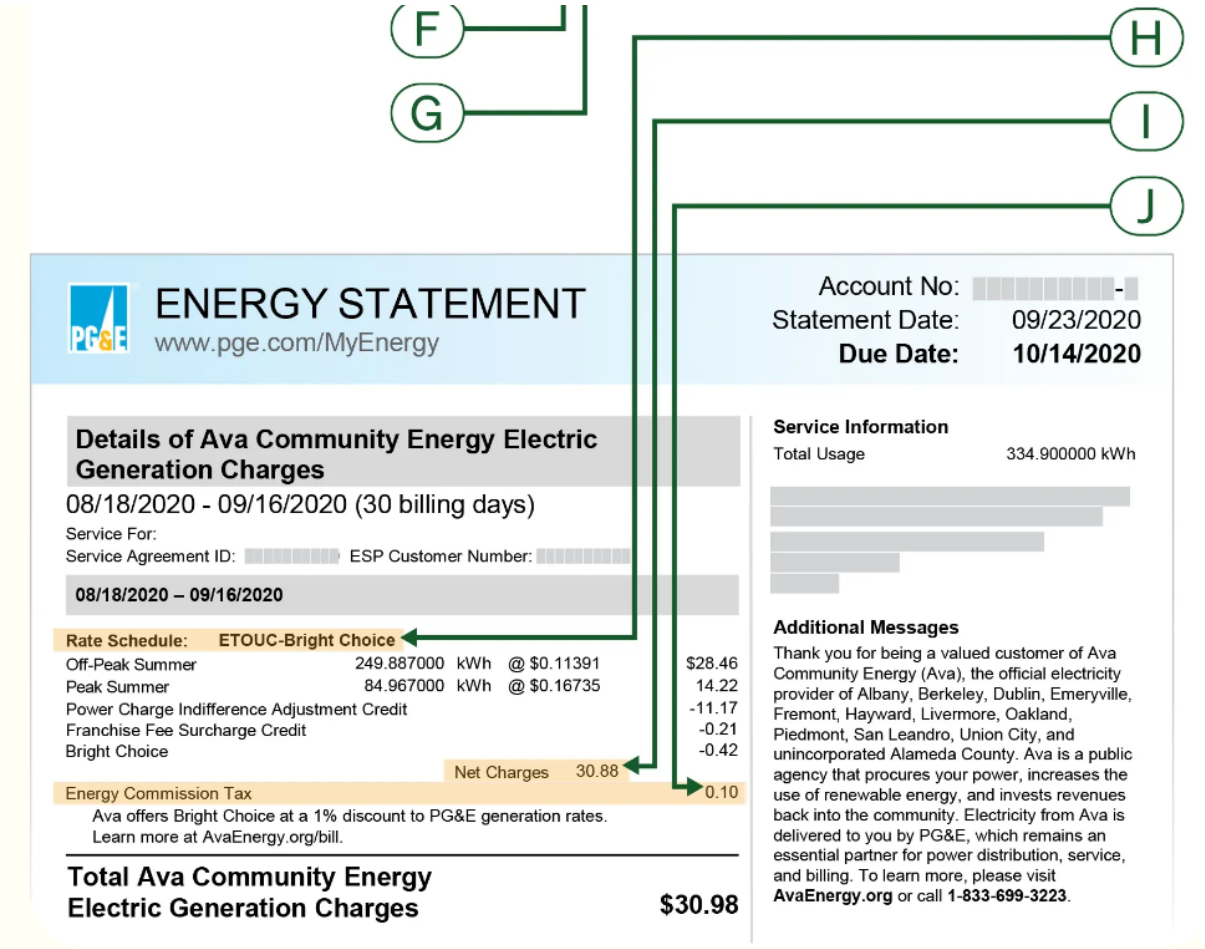
Daily Usage Comparison
1 Year Ago | Last Period | Current Period
33.46 | 48.55 | 37.36
Electric kWh / Day
1.53 | 2.51 | 1.63
Gas Therms / Day

Important Messages
California is fighting climate change and so can you! Your bill includes a Climate Credit from a state program to cut carbon pollution while also reducing your energy costs. Find out how at **cpuc.ca.gov/climatecredit**.

The gas summer Tier 1 (baseline) season begins on April 1. Your total Tier 1 quantities shown were calculated using your daily summer baseline allowance starting April 1 and your daily winter baseline allowance for any days in your billing period before April 1.

Continued on page 6

'Your Enrolled Programs' appears on the lower left of page one (circled). If CARE or FERA is listed, the household is already enrolled.



Rate schedule detail. H: the rate line shows the base PG&E schedule followed by the Ava service (here, ETOUC-Bright Choice).

Documentation. The full annotated bill walkthrough travels with the inserts; these three views cover what the Visit Record needs.

Step 3. CARE / FERA

CARE

CARE is a discount offered throughout California. For income-qualified residents it takes 30 to 35 percent off electricity and 20 percent off natural gas [confirm current CPUC figures]. Make sure to explain the program and confirm the household is not already enrolled.

Residents qualify automatically if anyone in the home is enrolled in LIHEAP, WIC, CalFresh/SNAP, CalWORKs or Tribal TANF, Head Start (Tribal only), SSI, Medi-Cal, the National School Lunch Program, or Bureau of Indian Affairs General Assistance. Households can also qualify on income; the current income table travels with the inserts [update annually].

FERA

FERA serves households of three or more whose income slightly exceeds CARE limits, with an 18 percent discount on electric rates.

Both programs use the same online application, available in English, Spanish, and Mandarin, and the same PG&E helpline. The application walkthrough is in the inserts.

CARE / FERA	Yes / No	Notes (what, why, where?)
Does the homeowner appear to qualify?		
Already enrolled?		
Application recommended / submitted today?		

Step 4. Medical Baseline

The Medical Baseline Program supports residential customers who depend on power for certain medical needs. A full-time resident of the home must have a qualifying medical condition or require a qualifying medical device for ongoing treatment.

- The benefit is approximately 500 additional kilowatt-hours of electricity and/or 25 therms of gas per month at the lowest baseline rate, plus extra notification ahead of Public Safety Power Shutoff events.
- This discussion involves limited medical information, and the homeowner can decline it entirely.
- If the homeowner prefers to have this conversation with a medical professional, refer them to RTEBN's clinician; that referral is part of the program, not a failure of the visit.

Medical Baseline	Yes / No	Notes (what, why, where?)
Does the homeowner appear to qualify?		
Already enrolled?		
Application recommended / submitted today?		

Step 5. LIHEAP / REACH

REACH provides an energy credit of up to $1,000 against a past-due balance. A homeowner qualifies if the account is a residential PG&E-territory account in the name of an adult living in the household, the past-due balance is no more than $2,000, the household has not received REACH assistance in the past 12 months, and income verification meets the current guidelines. Section 8 and government-subsidized housing accounts may be eligible; shared-utility, commercial, and cooking-only accounts are not. Credits are subject to funding availability, and the program's own eligibility rules govern.

LIHEAP provides separate bill assistance and weatherization support through the state's local providers, and enrollment in LIHEAP also qualifies a household for CARE automatically. The application guides for both are in the inserts.

LIHEAP / REACH	Yes / No	Notes (what, why, where?)
Does the homeowner appear to qualify?		

LIHEAP / REACH	Yes / No	Notes (what, why, where?)
Already enrolled?		
Application recommended / submitted today?		

Step 6. Just Transition / Energy Efficiency

If the homeowner is interested in free weatherization, electrification, or energy efficiency measures, even if they did not qualify for the earlier programs, explain that Rebuilding Together is part of the City of Berkeley's Just Transition Pilot Program.

- The program was funded by City Council to reduce greenhouse gas emissions and the impact of climate change on low-to-moderate income residents, through direct installation of electrification, energy efficiency, and weatherization measures.
- Electrification means replacing technologies that use fossil fuels, such as natural gas, with technologies that run on clean electricity: gas water heating, HVAC, and cooking equipment, along with the electrical upgrades that support them.
- These upgrades improve indoor air quality, increase comfort, decrease emissions, and can make homes safer and more resilient in extreme weather.
- All work is completed by pre-qualified contractors who meet the program's job quality standards, so the construction also provides economic benefits to local workers.

Capture the household details in the Visit Record and submit the post-visit follow-up form; interested households enter the assessment pipeline from there.

> **Coach tip.** You do not need to answer every technical question at the door. Interest plus contact information is a complete outcome; staff carry the conversation from there.

After the Visit

- Complete the post-visit follow-up form, recording which programs the household showed interest in and which applications were submitted.
- Return the Visit Record to the RTEBN Community Lead [confirm current contact]; do not retain copies of household information.
- If anything during the visit raised a wellness, safety, or access concern, flag it for the clinician referral pathway.

Inserts

The walkthroughs below are reproduced from the Climate Coach binder so this workbook stands alone. Screens and forms are the programs' own materials and change over time [update annually]. The current CARE/FERA income limits table travels separately with training materials.

Insert A. CARE / FERA Online Application Walkthrough

CARE FERA Enrollment or Renewal

NOTE: Internet Explorer is not supported for this application. Please use another browser such as Chrome, Edge, Safari or Firefox for best performance.

*** ACCOUNT NUMBER (REQUIRED)**

(First 10 digits only, Format 1234567891)

*** CUSTOMER NAME (REQUIRED)**

*** ADDRESS (LINE 1) (REQUIRED)**

ADDRESS (LINE 2)

*** CITY (REQUIRED)**

CARE/FERA enrollment or renewal, screen one: account number, customer name, and address.

*** STATE (REQUIRED)**

California

*** ZIP CODE (REQUIRED)**

LANGUAGE PREFERENCE

PREFERRED COMMUNICATION METHOD

- ○ Mail (billing address)
- ○ Email (By entering your email address, you are authorizing PG&E to send you information from time to time regarding your PG&E utility service and PG&E programs and services that may be available to you.)
- ○ Phone
- ○ Text

EMAIL ADDRESS

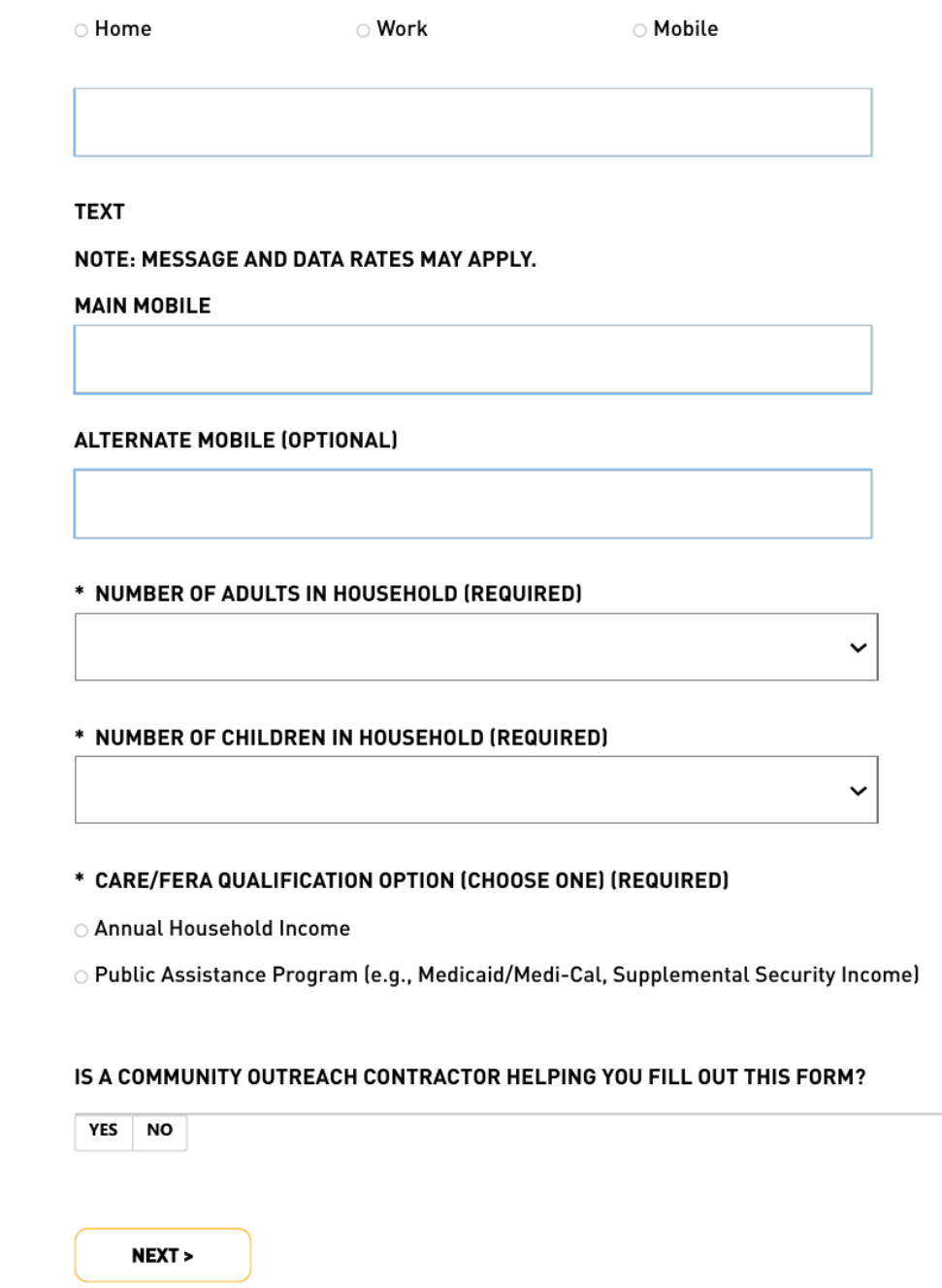
CONFIRM EMAIL

PHONE NUMBER

○ Home ○ Work ○ Mobile

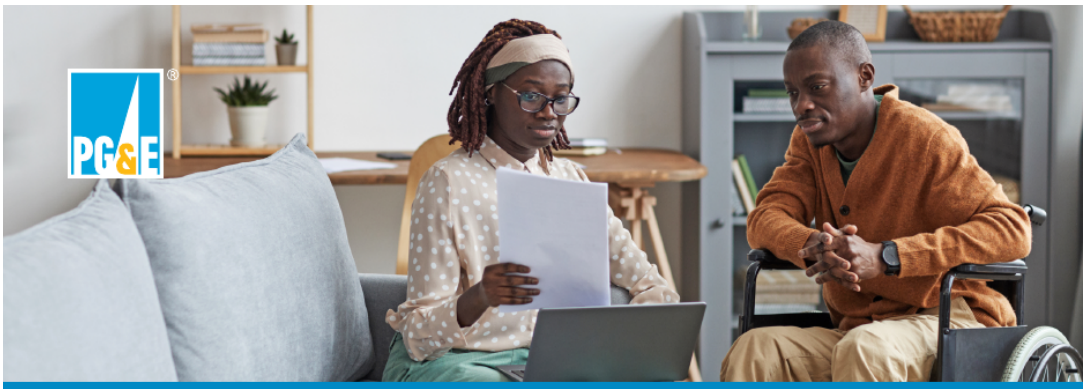
ALTERNATE PHONE (OPTIONAL)

Screen two: contact preferences and household size.



Screen three: qualification path (public assistance program or household income) and submission.

Insert B. Medical Baseline Program Guide and Application



Medical Baseline Program

APPLY TODAY

Get extra assistance from PG&E if you rely on power for certain medical needs.

Benefits

- **Financial Savings:** Get an additional monthly allotment of power or a discount based on your rate.
- **Customer Support:** You may receive additional alerts ahead of a Public Safety Power Shutoff (PSPS). If you do not respond, we will make additional alert attempts hourly, or contact you in person, until we reach you.

You may be eligible if you:

- Use a qualifying medical device
- Have an ongoing medical condition with certain heating or cooling needs

Some eligible devices include:

- Motorized Wheelchairs
- CPAP Machines
- Respirators
- Dialysis Machines

LEARN MORE

For a list of qualifying medical conditions and devices, please visit **pge.com/medicalbaseline** or call **1-800-743-5000**. Eligibility is not based on income.

PG&E Medical Baseline program flyer: benefits, eligibility, and qualifying devices.

How to enroll

1 **Apply online**
Fill out an application at pge.com/medicalbaseline.

2 **Get a confirmation code via email**
Share your code with your medical practitioner. They will need to input information online for your application.

3 **Have your medical practitioner complete your application**
Your medical practitioner will confirm if you are eligible for the program. They will then return your online application to PG&E.

You can also print the application form by visiting pge.com/medicalbaseline. Your medical practitioner will need to complete your paper application.

Mail application to:

PG&E Billing Center
Medical Baseline
P.O. Box 8329
Stockton, CA 95208

To request a paper application in large print or braille, please call **1-800-743-5000**.

Additional resources for Medical Baseline customers

Before a PSPS outage:

- See if you qualify for a generator rebate, portable battery or a Backup Power Transfer Meter to power devices during outages. pge.com/backuppower
- Save **1-800-743-5002** in your phone so you will recognize our number when we contact you.

During a PSPS outage, visit pge.com/pspsresources to:

- Locate a Community Resource Center to charge your devices and get supplies.
- Find accessible car rides and hotel options.
- Receive food replacement from local food banks.

For translation support in 240+ languages, call PG&E at **1-866-743-6589**.
To receive communications in large print or braille, call **1-800-743-5000**.

How to enroll: online application, printed application, and medical practitioner sign-off.

Rebuilding Together East Bay Network

Medical Baseline Program Application

Please complete all required fields and click SUBMIT to ensure your application is received.

Your contact information

* Indicates required field

PG&E CUSTOMER ACCOUNT NUMBER

If you have an account, please log in. If you do not have an account but have the account number for your address, please enter it here.

CUSTOMER FIRST NAME *

CUSTOMER LAST NAME *

RESIDENT WITH MEDICAL CONDITION FIRST NAME*

Same as account holder?

RESIDENT WITH MEDICAL CONDITION LAST NAME*

Application, part one: customer and account information.

SERVICE ADDRESS *

Select the resident with medical need's address within PG&E's service territory.

CUSTOMER MAILING ADDRESS

Enter a full address.

CUSTOMER HOME PHONE NUMBER *

Enter a number associated with your account, if possible.

CUSTOMER MOBILE PHONE NUMBER

Enter a number associated with your account, if possible.

EMAIL ADDRESS *

We will send confirmation of your application submission to this email.

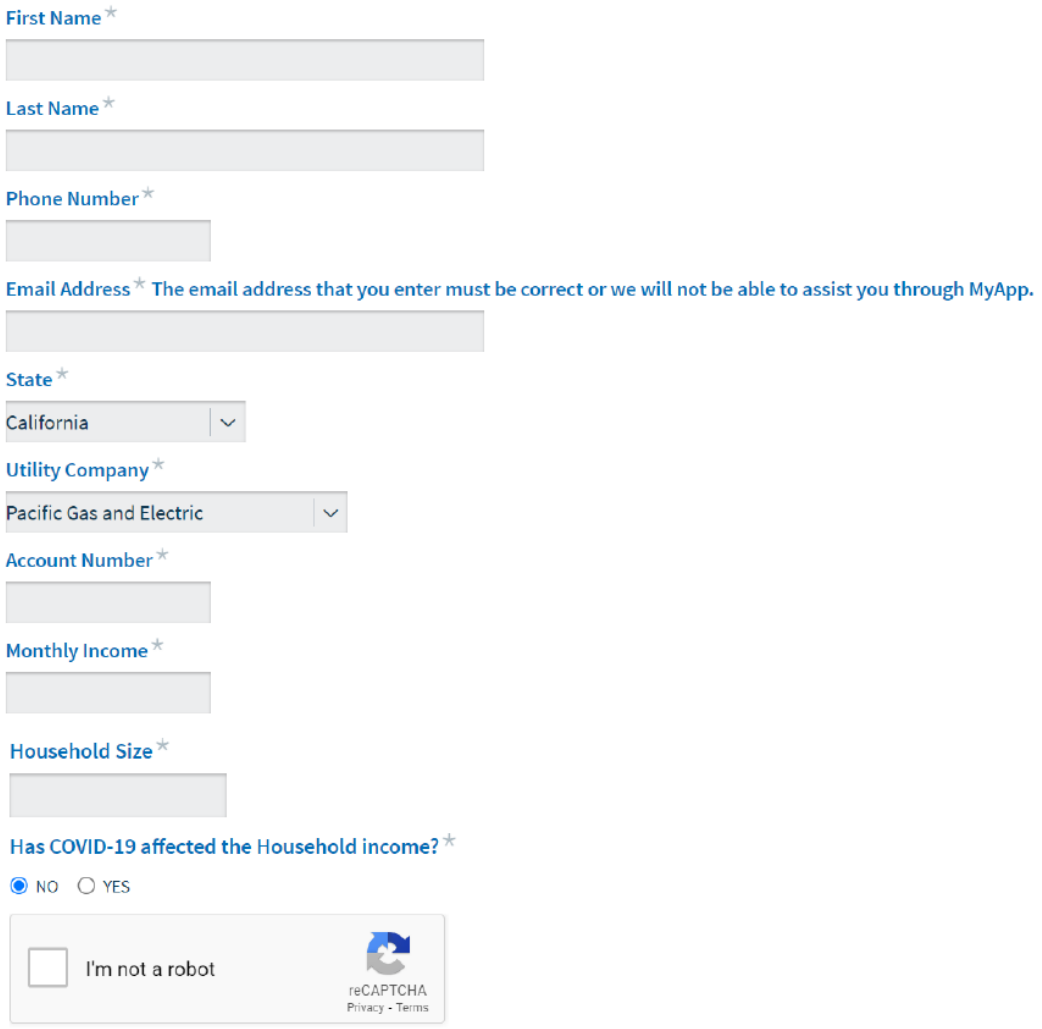
CONFIRM EMAIL ADDRESS *

Re-type your email address, to confirm that we have the correct one.

Application, part two: resident with medical need and service address.

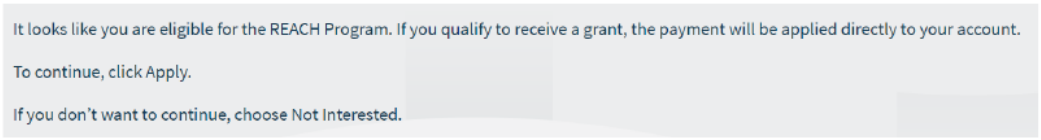
Insert C. REACH Application Walkthrough

The REACH application will first ask for some basic information to determine eligibility for the program:

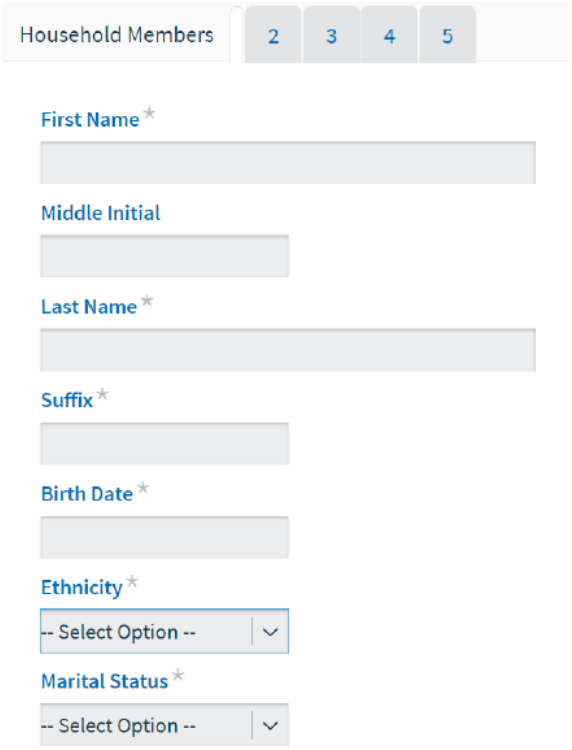


REACH application (hardshiptools.org): eligibility screening questions.

If the homeowner is eligible, the below message will appear. If not, they will not be able to continue with the application.



To fill out the application, please have the homeowner report information about all household members.



Options for ethnicity:

- African American
- Asian
- Caucasian
- Hispanic
- Native American
- Other Multi-Racial
- Chose not to answer

Options for marital status:

Eligibility confirmation and household member reporting.

Insert D. Just Transition Program Information for Homeowners

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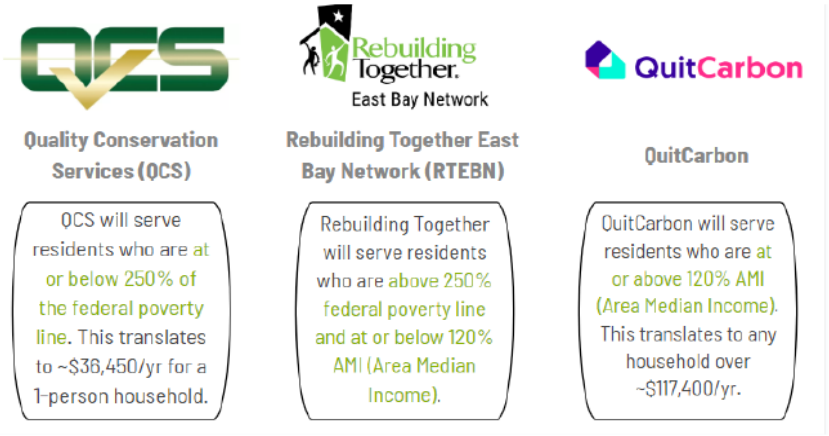
Section Notes/Questions:

If the homeowner is interested in free weatherization, electrification, or energy efficiency measures, even if they don't qualify for LIHEAP, explain that Rebuilding Together is part of a program offering these (the Just Transition project). Here are some reference points about the Just Transition project:

- The City of Berkeley's Just Transition Pilot Program was funded by City Council to reduce greenhouse gas emissions and the impact of climate change on low-to-moderate income residents by providing the direct installation of building electrification, energy efficiency, and weatherization measures in existing affordable housing buildings and for income-qualified households.
- Electrification refers to the process of replacing technologies that use fossil fuels, such as oil and natural gas, with technologies that use electricity.
- Electrification measures include replacing gas water heating, HVAC, electrical upgrades, and cooking equipment with systems that run on clean electricity.
- These upgrades improve indoor air quality, increase comfort, decrease greenhouse gas emissions, and can make homes safer and more resilient to extreme weather conditions.
- The Just Transition program requires that upgrades be completed by pre-qualified contractors who meet minimum labor standards to ensure that residential electrification construction work also provides economic benefits to workers.
- Just Transition funds can be used for labor, energy efficiency equipment, building envelope improvements, heat pump water heaters and/or heat pump air space heating/cooling, induction cooking ranges, and related work for health and safety upgrades in buildings with income-qualified residents.

Program reference points: what the Just Transition Pilot funds and why.

This project will start and end with Rebuilding Together, but depending on a homeowner's income levels, we may be working with a partner. If a homeowner is interested in having any of these services done, depending on their income level, let them know if they can expect to hear from QCS or QuitCarbon in addition to Rebuilding Together (guidelines below).



- Nobody from these programs will EVER charge homeowners any money, nor will they ask for SSN/birthdate over the phone.
- Additionally, no project work will be completed if it will result in increased costs for the homeowner.

Take any notes on their interest and Rebuilding Together staff will get back to them to refer them to the relevant partner to get them as many of these services as possible.

Special Project Recommendations

Many clients will express interest in having additional work done or think that they have other work coming. Listen courteously and take notes to turn over to Rebuilding Together. Answer any questions about further work with "That is something that Rebuilding Together will be able to work out with you. I can take note of this request and turn it over to Donnell."

How a homeowner's income level shapes which funding sources can serve them.

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East Bay Network

1	Is there additional interest in Electrification or other home repair services?	Recommended Job Ticket?
	Please note any additional services and electrification Measures Requested:	

Section Notes/Questions:

Interest capture: recording electrification and home repair interest for the referral pipeline.

Rebuilding Together East Bay Network

Just Transition Residential Electrification Pilot

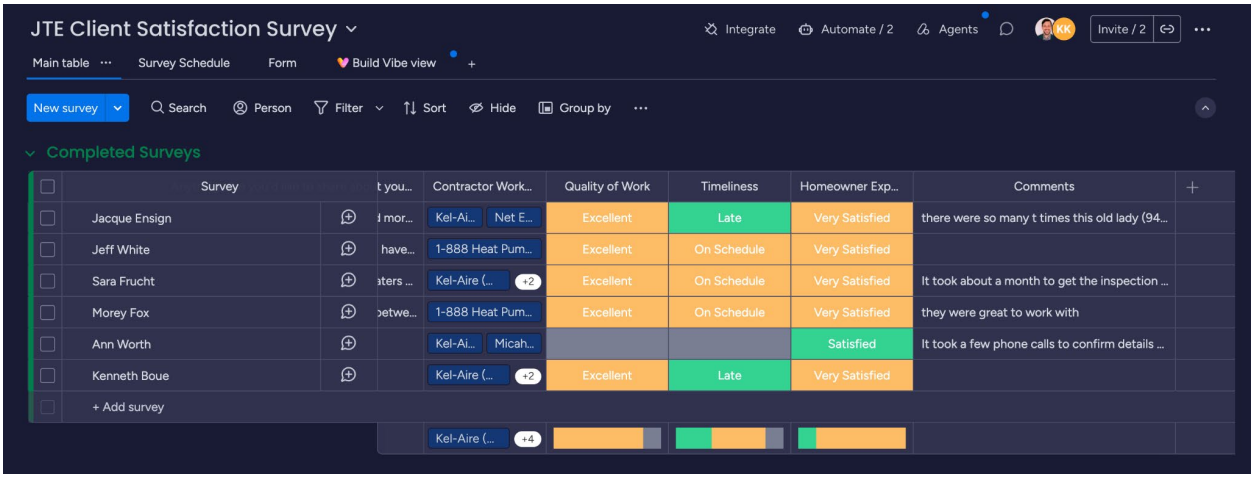
II.B Resident Data: Homeowner Survey Instrument

Purpose and Status

This appendix reproduces the homeowner satisfaction survey instrument the pilot is using to gather resident feedback at program close. The survey was provided to all 44 participating households, and six responses have been received so far. As with the braided funding figures in the companion appendix, complete results will take time to arrive after the program closes, and final response tallies will follow in a supplemental submission.

The program ultimately expects as much as 85 percent completion as follow-up outreach continues through the close-out window. Homeowner survey results are also being awaited so that client feedback can be leveraged during the contractor interview period described later in this appendix.

Both instruments are integrated into the program's online portal through Monday.com, the same workspace that carried program delivery. The homeowner survey runs as a WorkForm tied to its own response board, and the contractor exit survey is delivered through the same portal contractors used for scopes, permits, and project updates throughout the program. Appendix I, item A9, describes that contractor portal in more detail.



Homeowner Satisfaction Survey Instrument

The survey is administered online through the program's Monday.com WorkForms platform under the title “Homeowner Satisfaction Survey.” The form opens with the following invitation to residents.

> **Form introduction.** As we close out this program in the City of Berkeley, we kindly request that you submit a Homeowner Satisfaction survey. Your input is greatly appreciated and will help create quality recommendations for future program iterations.

Every question on the form is optional, so residents can skip anything they prefer not to answer, including the name and address fields. Three questions appear conditionally based on earlier answers, and those conditions are noted in the table. The instrument is presented in two parts, mirroring the form's two pages. Part 1 covers outreach, program understanding, and overall experience. Part 2 covers the contractors who performed work in the home.

Part 1. Outreach and program experience

#	Question	Response type and options
1	Your Name *Please input your first and last name. (Optional)*	**Short text**
2	Project Address *Please input your project address. (Optional)*	**Address**
3	Date of Initial Contact *Please input the date of initial contact with Rebuilding Together East Bay Network (RTEBN).*	**Date**
4	Name of Just Transition Team Member (If known)	**Short text**
5	How were you first contacted by the Just Transition team?	**Single select** • Door-to-door visit • Phone call • Email or physical letter • Referral by neighbor or organization • Other
6	Was the Just Transition Team Member respectful and courteous during your initial contact?	**Single select** • Yes • Somewhat • No
7	Comments *Please share additional comments about the Just Transition team.*	**Open response**
8	Did the Just Transition Team Member explain the program in a way that was easy to understand?	**Single select** • Yes • Somewhat • No
9	After the conversation, did you understand that: *Select all that apply.*	**Multi-select** • The program is fully funded by the City of Berkeley and other incentives • It can help improve your home's air quality and safety • You may qualify for free energy-efficient appliances • You do not need to pay any money • I'm still unclear about some things
10	Did the Just Transition Team Member ask about your home's current needs or challenges?	**Single select** • Yes • No • Unsure

#	Question	Response type and options
11	Did you feel comfortable asking questions or raising concerns?	**Single select** • Yes • No • Unsure
12	Were you encouraged to participate or take the next step in the Program after initial contact?	**Single select** • Yes, and I have • Yes, but I did not • No, I wasn't sure what to do next
13	How would you rate your overall experience with the JT team so far?	**Single select** • Excellent • Good • Fair • Poor
14	If fair or poor, what could have been improved? *Shown only when the overall experience rating in question 13 is Fair or Poor.*	**Short text**
15	Would you like a follow-up call to answer additional questions or help move forward?	**Single select** • Yes, please contact me • No, I'm okay for now
16	Phone *Shown only when question 15 is answered "Yes, please contact me."*	**Phone number**
17	Email *Shown only when question 15 is answered "Yes, please contact me."*	**Email address**
18	What measure(s) did you receive?	**Multi-select** • Range Hood • Induction Stove • Heat Pump Water Heater • Heat Pump Ductless Mini-Split • Heat Pump Ducted Mini-Split • Windows • Circuitry • Panel Upgrade • Electric Dryer
19	Anything else you'd like to share about your initial experience or suggestions for improvement?	**Open response**

Part 2. Contractor feedback

#	Question	Response type and options
20	Contractor Worked With *Select all the contractors who you worked with.*	**Multi-select** • Kel-Aire (Water Heaters, HVAC, and Range Hoods) • 1-888 Heat Pumps (HVAC and Stoves) • Micah Electric (Electrical) • Net Electric (Electrical) • Solid Rock (General Contractor)

#	Question	Response type and options
21	Quality of Work	**Single select** • Excellent • Good • Fair • Poor
22	Timeliness	**Single select** • On Schedule • Late • Early
23	Homeowner Experience	**Single select** • Very Satisfied • Satisfied • Dissatisfied
24	Comments *Please share additional comments about the contractor(s).*	**Open response**

Early Responses: The First Six Respondents

Six of the 44 participating households have returned the survey so far. These early responses are reported here for completeness and are not treated as representative of the full participant group; final tallies will follow the post-close collection window described above. Respondents are labeled R1 through R6 in the order their responses were received. Names, project addresses, and contact information supplied on the forms are withheld from this appendix.

The table below summarizes the answers that carry across respondents. Every question on the form is optional, and blank cells indicate questions the respondent left unanswered. Contractor names are shortened from the form's full option labels.

R	Measures	Contractor(s)	Experience with JT team	Quality of work	Timeliness	Experience with contractor(s)	Follow-up request
R1	Heat Pump Water Heater, Panel Upgrade	Kel-Aire, Net Electric		Excellent	Late	Very Satisfied	Yes
R2	Heat Pump Ductless Mini-Split	1-888 Heat Pumps	Excellent	Excellent	On Schedule	Very Satisfied	No
R3	Heat Pump Water Heater, Heat Pump Ductless Mini-Split, Electric Dryer	Kel-Aire, 1-888 Heat Pumps, Solid Rock	Excellent	Excellent	On Schedule	Very Satisfied	Yes
R4	Induction Stove	1-888 Heat Pumps	Excellent	Excellent	On Schedule	Very Satisfied	Yes

R	Measures	Contractor(s)	Experience with JT team	Quality of work	Timeliness	Experience with contractor(s)	Follow-up request
R5	Heat Pump Ductless Mini-Split	Kel-Aire, Micah Electric				Satisfied	
R6	Range Hood, Induction Stove, Heat Pump Water Heater, Heat Pump Ductless Mini-Split, Circuitry, Panel Upgrade	Kel-Aire, 1-888 Heat Pumps, Micah Electric	Excellent	Excellent	Late	Very Satisfied	No

What the early responses say

The responses received to date are consistently positive. All six respondents said the Just Transition team member was respectful and courteous during initial contact, and all four who rated their overall experience with the JT team rated it Excellent. Among the five who answered the first-contact question, three were first reached by phone call and two by email or physical letter. On the contractor side, all five respondents who rated quality of work rated it Excellent, and the homeowner experience rating was Very Satisfied for five respondents and Satisfied for one. Timeliness was the more mixed measure so far, with three respondents reporting work on schedule, two reporting it late, and one leaving the question blank.

Open-text comments in the responses received to date are brief and largely appreciative. One respondent wrote of the team and contractors that “They've all been wonderful!” and another that the contractors “were great to work with.” The suggestions offered so far are practical rather than critical. One respondent noted that more written material would have been helpful, one described a roughly month-long wait for a city inspection that the contractors could not control, and one asked follow-up questions about which measures the program and related city loan offerings can fund; that same respondent selected “I'm still unclear about some things” on the program-understanding question. Three of the six asked for a follow-up call. Answers are sparse in places. One respondent completed only part of the form and two skipped the overall experience rating, so the counts above are given against the number who answered each question.

Because each of these six responses identifies the contractors who worked in the home and rates their work, they also seed the per-firm feedback compilation described in the integration subsection below.

Linking Resident and Contractor Feedback

The homeowner surveys pair with contractor exit feedback gathered during the same close-out period. The program is conducting one group exit interview and five individual exit interviews with the participating contractors. Homeowner survey results are being awaited so that client

feedback can inform the interviews and be raised with contractors directly during the interview period.

Part 2 of the homeowner instrument makes this pairing practical. Because residents identify which contractors they worked with and rate quality, timeliness, and overall experience by firm, the program can bring specific, anonymized resident themes into each contractor conversation rather than relying on general impressions.

Integrating Resident and Contractor Feedback

Homeowner survey responses, and especially the contractor feedback questions on the form's second page, are compiled by the firm and anonymized before they reach any contractor conversation. In our experience, client feedback lands better in an interview when it arrives as a pattern across several homes rather than as a single attributable comment, so the program is holding the contractor interview period open until enough homeowner responses have accumulated to support that kind of summary.

Once compiled, feedback specific to a firm goes to that firm's individual session, and themes that cut across firms go to the group session. The program expects both streams to feed the final report, with firm-level material informing the contractor experience subsection and the recurring themes informing the lessons learned subsection.

Contractor Exit Survey

The contractor exit process pairs one group interview with five individual interviews, one for each participating firm. The group session is designed to surface program-wide themes, including site-visit sequencing across trades, payment mechanics, the portal experience, and what contractors believe the program should change in a future round. In our experience, hearing the firms discuss these subjects together draws out patterns that individual conversations can miss.

The individual interviews are firm-specific. Each session covers the scopes the firm performed in its trade, its experience with onboarding and technical assistance, any back-office growth during the pilot, such as certified payroll practice or apprenticeship participation, and whether the program left the firm better positioned to pursue public work. These sessions give each contractor room to speak candidly about its own experience away from the group setting.

The drafted 12-question instrument below structures the individual sessions. It gives each firm a consistent way to record its experience across the areas the pilot most needs feedback on, including onboarding and technical assistance, payment timeliness against benchmarks, documentation and portal workload, cross-trade coordination, and the utility application process. The group session then works from the themes that recur across the individual responses.

Status. No standing contractor exit survey was found on the program's survey board or in program files, so this instrument was drafted for the report in the same format as the homeowner survey.

#	Question	Response type and options
1	Which trade or trades did your firm perform under the pilot?	**Multi-select** • HVAC • Water heating • Electrical • General construction • Other
2	How would you rate the onboarding process overall, including the RFQ, the readiness self-assessment, and contracting?	**Single select** • Excellent • Good • Fair • Poor
3	Did the technical assistance you received (labor standards, certified payroll, apprenticeship setup) prepare your firm to meet program requirements?	**Single select** • Yes • Somewhat • No

#	Question	Response type and options
4	Once an invoice was accepted, how timely were program payments against the stated benchmarks?	**Single select** • Faster than the benchmark • On the benchmark • Behind the benchmark • Significantly behind the benchmark
5	Were the payment benchmarks workable for your firm's cash flow?	**Single select** • Yes • Somewhat • No
6	How manageable was the documentation and portal workload, including work orders, photo documentation, and certified payroll uploads?	**Single select** • Manageable • Sometimes burdensome • Consistently burdensome
7	How well did site-visit sequencing and coordination with other trades work on homes where multiple contractors were scheduled?	**Single select** • Worked well • Mixed • Frequently caused delays
8	How was your experience with utility applications, permits, and inspections, including panel and service upgrade approvals?	**Single select** • Smooth • Some friction • Significant delays
9	What single change would most improve the program for contractors in a future round?	**Open response**
10	Did participation change your firm's capacity or practices, for example hiring, apprentices, benefits, or new lines of work?	**Open response**
11	Would your firm participate in a future round of the program?	**Single select** • Yes • Yes, with changes • No
12	Is there anything else you would like to share with the program team?	**Open response**

Rebuilding Together East Bay Network

City of Berkeley Just Transition Electrification Pilot Program

Appendix II.C. Anonymized Per-Home Interventions and Per-Home Cost

Purpose and How to Read This Table

This appendix lists every home served by the pilot, the measures delivered in it, and the program cost directly attributable to each home. Home IDs follow the program's assessment index to anonymize homeowner information.

Direct funding states the Just Transition program cost directly attributable to each home: the approved per-intervention rates set at the program's shared bid walk, applied to the work delivered there. Different contractors carried different approved rates for the same intervention type, so two homes with the same measures can carry different costs.

Homes 1-4 are the pilot-within-a-pilot cohort, whereas homes 5-44 were served through the aggregated bid-sheet cohort.

Per-Home Interventions and Cost

ID	Appliance Scope of Work	Electrical Scope of Work	Direct Cost
Home 01 (PWP)	Home assessment 2:1 HVAC (Heating, Ventilation, Air Conditioning) HPWH (Heat Pump Water Heater) Induction range Vent Dryer* Solar + battery* 4 Windows	4 circuits 2 main panel upgrade	**$74,782.00**
Home 02 (PWP)	Home assessment 2:1 HVAC HPWH Induction range Cookware	2 circuits 1 main panel upgrade	**$44,666.08**
Home 03 (PWP)	Home assessment 2:1 HVAC HPWH Solar + battery* 4 Windows	2 circuits 1 main panel upgrade	**$38,516.41**
Home 04 (PWP)	Home assessment 2:1 HVAC* HPWH*	1 main panel upgrade* 1 circuit	**$4,618.25**
Home 05	Home assessment 2:1 HVAC HPWH	2 circuits	**$35,929.33**
Home 06	Home assessment 2:1 HVAC	1 circuit	**$21,184.65**
Home 07	Home assessment 2:1 HVAC HPWH Induction range Cookware	1 smart panel upgrade 3 circuits	**$58,490.23**

 **Measure is paid out of braided funding, not reflected in the Direct Cost to Just Transition*

ID	Appliance Scope of Work	Electrical Scope of Work	Direct Cost
	Vent		
Home 08	Home assessment HPWH Induction range Cookware	1 circuit	**$21,979.23**
Home 09	Home assessment HPWH	1 main panel upgrade 1 feeder upgrade 2 circuits	**$42,600.19**
Home 10	Home assessment 2:1 HVAC HPWH	2 circuits	**$32,227.19**
Home 11	Home assessment 3:1 HVAC HPWH	1 smart panel upgrade 2 circuits	**$46,664.19**
Home 12	Home assessment 2:1 HVAC	1 smart panel upgrade 1 circuit	**$39,854.19**
Home 13	Home assessment Ducted HVAC	N/A	**$24,579.99**
Home 14	Home assessment Ducted HVAC	1 circuit	**$29,667.81**
Home 15	Home assessment 2:1 HVAC	1 circuit, wiring	**$19,570.31**
Home 16	Home assessment Ducted HVAC	1 circuit	**$29,070.31**
Home 17	Home assessment HPWH Induction range Cookware Vent	2 circuits	**$25,509.23**
Home 18	Home assessment 2:1 HVAC	1 circuit, wiring	**$20,017.91**
Home 19	Home assessment HPWH 2:1 HVAC Dryer*	3 circuits	**$43,793.19**
Home 20	Home assessment Induction range Vent 3 windows	2 circuits	**$28,152.19**
Home 21	Home assessment 1:1 HVAC	1 circuit	**$19,552.67**
Home 22	Home assessment 3:1 HVAC HPWH Vent	3 circuits	**$31,030.62**
Home 23	Home assessment 6 windows	N/A	**$21,758.19**
Home 24	Home assessment Induction range Cookware	1 main panel upgrade 1 circuit	**$30,858.23**
Home 25	Home assessment	1 main panel upgrade	**$30,531.85**

**Measure is paid out of braided funding, not reflected in the Direct Cost to Just Transition*

ID	Appliance Scope of Work	Electrical Scope of Work	Direct Cost
	2:1 HVAC	1 circuit	
Home 26	Home assessment Induction range Cookware	1 main panel upgrade 1 circuit	**$33,097.99**
Home 27	Home assessment 2:1 HVAC	1 main panel upgrade 1 circuit	**$32,082.86**
Home 28	Home assessment 2:1 HVAC	1 main panel upgrade 1 circuit	**$36,298.39**
Home 29	Home assessment HPWH Vent	1 main panel upgrade 2 circuits	**$23,502.67**
Home 30	Home assessment 1:1 HVAC	1 main panel upgrade 1 circuit	**$30,626.91**
Home 31	Home assessment	1 main panel upgrade	**$23,808.75**
Home 32	Home assessment 2:1 HVAC Induction range Vent	1 main panel upgrade 1 feeder upgrade 3 circuits	**$46,022.19**
Home 33	Home assessment Induction range Cookware Vent	N/A	**$10,112.23**
Home 34	Home assessment, declined enrollment	N/A	**$1,663.19**
Home 35	Home assessment, declined enrollment	N/A	**$1,663.19**
Home 36	Home assessment, declined enrollment	N/A	**$1,663.19**
Home 37	Home assessment, declined enrollment	N/A	**$1,663.19**
Home 38	Home assessment, declined enrollment	N/A	**$1,663.19**
Home 39	Home assessment, declined enrollment	N/A	**$2,663.19**
Home 40	Home assessment, declined enrollment	N/A	**$3,151.19**
Home 41	Home assessment 3:1 HVAC HPWH Induction range Cookware Vent	1 smart panel upgrade 1 feeder upgrade 2 circuits	**$65,158.32**
Home 42	Home assessment 1:1 HVAC	N/A	**$10,663.19**
Home 43	Home assessment HPWH	N/A	**$9,918.52**
Home 44	Home assessment Induction range Cookware	N/A	**$9,182.23**

**Measure is paid out of braided funding, not reflected in the Direct Cost to Just Transition*

ID	Appliance Scope of Work	Electrical Scope of Work	Direct Cost
PG&E Applications	$30,000	10 homes	**$30,000.00**
Total	86 appliances, 44 home assessments	73 electrical interventions	**$1,190,209.02**

Portfolio Summary

Description	Homes Served	Share
Homes without electrical work	6	**16.2%**
Homes with electrical circuitry	30	**81.1%**
Homes with smart-panel upgrade	4	**10.8%**
Homes with main meter panel upgrade (utility application required)	13	**35.1%**
Pilot-within-a-pilot homes	4	**10.8%**

Description	Count	Including Home Assessments
Total interventions (excluding PWP)	129	129 + 44= 173
Total interventions (including PWP)	158	158 + 44 = 202

Sources: the City permit tracking sheet (scope per home), the program's intervention ledger at approved rates (cost per home), and close-out records. The full methodology for aggregation and rate-setting is in the Aggregation and Sequencing Workbook (Appendix I, A13).

About these figures. A program that braids multiple funding sources and runs its administrator as general contractor carries some direct costs that are shared across many homes, including permitting, PG&E applications, and appliance purchasing and coordination. Where those shared costs touch an individual home, the braided and direct funding figures for that home carry an element of estimation. Program delivery concluded on July 30, 2026. The majority of expenditures and work fall within the fiscal year ending June 30, 2026, and will be audited and locked as of January 2027; the final month of operation will be audited with the fiscal year ending June 30, 2027, in late fall of 2027.

**Measure is paid out of braided funding, not reflected in the Direct Cost to Just Transition*

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Just Transition Residential Electrification Pilot

Appendix II.D. High Road Jobs supplement: contractor technical assistance and pre-training memos, adapted for publication

II.D High Road Jobs: Contractor Technical Assistance and Pre-Training

Purpose and Themes

This appendix documents the technical assistance and pre-training the pilot delivered to selected contractors before and during their first assignments, the part of the contractor on-ramping model described in Section II.2.2 of the report. In our experience, a well-informed contractor base is built before procurement, not after selection. The pre-RFQ information packet, the open period with one-on-one meetings, and the readiness self-assessment let firms enter the process at whatever readiness level they were at, and blind scoring paired with that open period helped change who could win the work, not just who applied.

The barrier keeping small and emerging contractors out of public work is usually not the wage itself but the back office the wage demands, including certified payroll, worker classification, fringe documentation, and compliant invoicing. The program treated the back office as a program-design problem rather than a contractor deficiency, and taught it. Firms could reach the same compliance bar by either of two pathways, becoming a union signatory or meeting the pilot's Job Quality Standards directly, and the technical assistance was structured to support both.

A consistent pattern across the pilot was one-to-one over group. Onboarding opened with a short group phase, a shared orientation and a joint site walk, and then deliberately narrowed to one-to-one work. In our experience, individualized onboarding tended to outperform group training for back-office skills; the program standardized the framing and the tools, then delivered them firm by firm.

Finally, training was tied to the work it enabled and delivered just in time. The procurement and certified payroll training landed the week before mobilization; the utility application workshop preceded the batched PG&E application rounds; and the manufacturer presentations landed during the appliance phase and set up warm handoffs to homeowners. Networking ran through all of it, drawing in union locals through the Construction Trades Workforce Initiative, resource centers such as the Construction Resource Center and Emerald Cities Collaborative, peer-delivered workshops, and manufacturer partnerships.

The Training and Onboarding Methodology

Phase	Training or touchpoint	Tied to what work	How delivered
Pre-RFQ open period	An information packet, one-on-one meetings, a readiness self-assessment, and pathway support.	The procurement itself; firms learned the standards and how to close gaps before responding.	One-on-one with the administrator and workforce partners.
Selection and onboarding	A group orientation and shared site walk, then individualized onboarding covering prevailing	The approved rates and each firm's first work order.	A group phase narrowing to one-to-one.

Phase	Training or touchpoint	Tied to what work	How delivered
	wage, certified payroll, invoicing, and worker classification.		
Pre-mobilization	Procurement and certified payroll training, held as five sessions, one per firm, November 17 to 20, 2025.	The first aggregated work orders and the first payroll cycles.	One-to-one, per firm.
Mid-delivery	The utility application workshop (February 9, 2026).	The batched PG&E application rounds and the panel and service track.	A peer-delivered workshop.
Appliance phase	Manufacturer informational presentations (Daikin, March 10, 2026; CopperHome, March 17, 2026).	Appliance installations, rebate documentation, and homeowner warm handoffs.	Manufacturer-led and hands-on.
Continuous	Verification as a service, with the payroll checklist known in advance, and cross-trade coordination meetings.	Every payment cycle and every shared home.	Administrator-run.

Each training was scheduled against the pilot's sequencing plan (Appendix I, item A13) so that the skill arrived just before the work that required it.

The Pre-Training Record: Memos

The four memos below document the sessions summarized above. Each was originally submitted to the City of Berkeley as program documentation and is adapted here for publication; formatting has been standardized, homeowner-identifying details have been removed, and minor wording has been edited for clarity. The substance of each memo is otherwise unchanged, and the sessions appear in chronological order by the date they were held.

Documentation. The SolidRock session reproduced below was one of a series of procurement and certified payroll training the pilot held with all five selected firms between November 17 and November 20, 2025. The full series is documented in the pilot's quarterly reporting to the City.

1. Procurement and Certified Payroll Training: SolidRock (November 20, 2025)

Date	November 20, 2025
Participants	RTEBN program leadership, with SolidRock's estimator and payroll administrator
Purpose	Prepare the firm to develop compliant whole-home bids and to operate the program's certified payroll and field verification requirements

What was covered

- Developing whole-home bids aligned with labor classifications and prevailing wage determinations.
- Certified payroll submission requirements, including accurate reporting of hours, base wages, fringe contributions, and overtime documentation, and submission of statements of compliance.
- Documenting accomplishments per scope category and identifying the workers performing each task.
- Confirming field work through RTEBN's weekly on-site verification process.
- Self-certification and payroll accountability procedures, reviewed in detail.
- Structured homeowner communication practices for scheduling and project milestone updates.

Outcomes

The training produced improved alignment between scope development, payroll reporting, and field verification. SolidRock also implemented the structured homeowner communication practices introduced in the session.

2. Utility Application Workshop: Net Electric (February 9, 2026)

Date	February 9, 2026, beginning at 3:00 p.m.
Participants	RTEBN staff Kati Khov and Tracey Greenwell, with Net Electric owner Nathan Tyler
Purpose	Build contractor capacity for navigating the PG&E project application process in support of enrolled households pursuing electrification upgrades

What was covered

- An overview of enrolled homeowners with pending PG&E project applications.
- A step-by-step tutorial on completing and submitting PG&E project applications.
- Just Transition program next steps and contractor coordination protocols.

Outcomes

The session functioned as a targeted contractor training, equipping Net Electric with the procedural knowledge and program context needed to execute electrification installations on behalf of program participants, while also strengthening RTEBN's own administrative capacity to prepare and procure the necessary PG&E applications. Following the session, Net Electric continued to provide technical assistance to RTEBN staff during the PG&E application process, supporting accurate and timely project submissions for enrolled households. Engaging a minority-owned contractor in this teaching role also reflects the program's equity-centered implementation and local workforce inclusion commitments. The application guide this track produced is reproduced as Appendix II.E.

3. Manufacturer Information Presentation: Daikin (March 10, 2026)

Date	March 10, 2026, 3:00 to 3:45 p.m.
Participants	RTEBN staff Kati Khov, Daikin Sales Planning Manager Tommy Ito, and real estate broker David Pixler
Purpose	Introduce Daikin Comfort to the program and explore product-specific training for the pilot's HVAC contractors

What was covered

- Climate Coaches and Just Transition program overview.
- RTEBN's role, responsibilities, and partner network.
- Daikin Comfort company and product overview.
- Just Transition HVAC contractor training and certification opportunities.
- The manufacturer partner on-site training model, in which manufacturer representatives demonstrate appliance operation to homeowners following installation.

Outcomes

The conversation centered on the potential for Daikin Comfort to work directly with the program's HVAC contractors to provide product-specific training on the installation and operation of Daikin heat pump systems. This model would equip contractors already embedded in the program to install and service Daikin appliances to manufacturer standards, strengthening the quality and consistency of electrification work performed in client homes. A two-tiered approach, with upstream contractor training as the foundation and homeowner-facing on-site demonstrations following installation, was identified as a replicable and scalable model for integrating manufacturer partners into the program's work.

4. Manufacturer Information Presentation: CopperHome (March 17, 2026)

Date	March 17, 2026, 12:00 to 12:30 p.m.
Participants	RTEBN staff Kati Khov and CopperHome Director Charlie Rebich
Purpose	Introduce CopperHome to the program and explore induction range procurement, incentives, and homeowner-facing training

What was covered

- Climate Coaches and Just Transition program overview.
- RTEBN's role, responsibilities, and partner network.
- CopperHome company and product overview.
- Bulk order and delivery logistics.
- Available rebate and incentive programs.
- The manufacturer partner on-site training opportunity, in which CopperHome representatives would demonstrate Charlie range operation directly to homeowners after installation.

Outcomes

The discussion addressed homeowner engagement and adoption of induction stove technology, particularly for the low-income older adults the program primarily serves, who may be less familiar or comfortable with high-technology changes in their homes. Strategies for building homeowner confidence and trust during and after appliance installation were reviewed, and the on-site demonstration model was noted as supporting a warm handoff from installation to independent use, which is especially valuable for this client population.

Two incentive programs were identified to help offset the cost of Charlie range purchases. The first is the California Energy Smart Homes rebate, which at the time provided a $3,000 rebate on battery induction ranges; RTEBN had successfully used this rebate in a prior application for the pilot's fully electrified whole-home project. The second is a 40 percent federal tax direct payment applicable to qualifying purchases [verify current incentive terms and amounts before relying on these figures]. Both were noted as potentially significant cost-reduction mechanisms for future range procurement.

Recommendations

Based on the pilot's experience, we offer the following recommendations to programs adopting a similar contractor development model.

- Fund the technical assistance as a permanent program line. In our experience, it is what converts labor standards from a barrier into an on-ramp.
- Set the minimum open period between pre-RFQ release and RFQ at three months or more. The pilot's open period ran roughly four months, and firms used that time to close real readiness gaps.
- Deliver back-office training individually rather than in groups, and schedule each training just before the phase of work that needs it.
- Use peer and manufacturer delivery where possible. Peers carry credibility with emerging firms, and manufacturers carry the product-specific rebate and installation detail that no administrator can match.
- Tell contractors at onboarding exactly what will be verified. Firms that know what will be checked tend to build compliance into their pricing and routines from the first week.

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Appendix II.E. Job order sequencing supplement: the PG&E application guide, adapted for publication

II.E Job Order Sequencing: PG&E Application Guide

This appendix adapts the PG&E application guide the pilot produced for its utility application track, described in Section II.2.3 of the report. Main panel and service upgrades depend on utility approval timelines the program does not control, so the pilot treated PG&E service applications as their own sequencing track. Applications were batched into rounds, a dedicated program administrator served as the single point of contact with PG&E, and the rest of each home's work was sequenced around the utility timeline rather than waiting on it.

The guide was produced as a program deliverable and is adapted here for publication. The original is a designed visual document; this adaptation carries its content in narrative and table form. The steps, documents, timelines, and roles below reflect the guide as written, supplemented where noted by the pilot's practice.

Why Panel Capacity Drives Sequencing

The program's interventions replace gas appliances with heat pump water heaters, heat pump HVAC systems, electric dryers, induction stovetops, and range hoods, alongside panel upgrades and window replacements. Many participating homes require meter-main panel upgrades to support the added electrical load of the new appliances. Establishing baseline service capacity is the critical first step for each home, because it determines which electrification pathway the home follows and whether a PG&E application is needed at all.

Step 1. Assess the Panel and Choose the Pathway

1. The electrical contractor conducts a site visit at each participating residence to document the existing electrical infrastructure and develop a site plan capturing current service capacity and required upgrades.
2. Program staff review electrification options with the homeowner and propose the new appliances, outlining the required amperage for each measure.
3. The final scope of work is confirmed, and the Homeowner Agreement contract is finalized and executed.
4. The contractor evaluates panel condition, including load capacity, physical degradation, and the presence of outdated systems such as knob and tube wiring.

The assessment places each home on one of three pathways.

Pathway	When it applies	What happens
Circuitry only	The existing load capacity is sufficient to accommodate the planned upgrades.	Only the required circuitry is installed; no PG&E application is needed.

Pathway	When it applies	What happens
Load management system	The existing service is rated at 90 to 100 amps and is nearing its capacity limits.	A load management system is installed. The pilot prioritized this pathway because it minimizes administrative burden and reduces mobilization requirements.
PG&E service upgrade	The existing service capacity is below 100 amps and the scope of work requires increased load capacity.	The contractor initiates the PG&E service upgrade application process described below.

The guide recommends evaluating program capacity, including budget and timeline, before initiating service upgrade applications. In our experience the service upgrade is the pathway of last resort rather than the default, and treating it that way protects both the program budget and the construction schedule.

Step 2. The PG&E Service Upgrade Application

Once a home is approved for the application pathway and any engineering advance has been paid, the job is completed by scheduling a disconnect and reconnect appointment. The sequence below carries the application from documentation to that appointment [confirm: the original guide presents the application flow as a diagram; the sequence below is adapted from that diagram and the pilot's practice].

1. Assemble the full home documentation the application requires, including the contractor's site plan and current service capacity details [confirm the complete documentation list against current PG&E application requirements].
2. The program administrator submits the application through PG&E's project application process and logs it in the application round tracker.
3. Respond to PG&E documentation requests by the stated due date. Applications can be dropped if documentation is not provided on time.
4. Allow for processing, which can take up to 30 days.
5. If PG&E requires an engineering advance, pay it to release the job for scheduling. In the pilot these fees ranged from $2,500 to $3,500 and could include additional costs for trenching.
6. Obtain the approved City permit. An approved permit is necessary to schedule the City inspection before service work can be scheduled with PG&E.
7. Schedule the disconnect and reconnect appointment, coordinating so the City inspection is completed the same day and the home avoids a delayed power shut-off.

How Berkeley did it. The pilot batched its service upgrade applications into rounds tracked on the program's project management board, with one administrator as the single point of contact for PG&E. The pilot's electrical contractor, Net Electric, trained program staff on the application process in a February 2026 workshop (see Appendix II.D) and continued to provide technical assistance during submissions, which helped keep applications accurate and within their documentation deadlines.

Roles

Role	Responsibilities
Program administrator	Serves as the single point of contact with PG&E; batches applications into rounds; tracks status, documentation due dates, and extensions; coordinates permit and inspection timing with the City.
Electrical contractor	Conducts site visits, documents existing infrastructure, develops site plans, advises on pathway selection, and performs the upgrade work.
Homeowner	Reviews the electrification options and finalizes the scope of work through the Homeowner Agreement.
PG&E representative	Processes the application, sets documentation due dates and any engineering advance fees, and schedules the disconnect and reconnect.
City permit office	Issues the permit and completes the inspection that is coordinated for the same day as the PG&E service work.

Challenges and Solutions

The guide closes with the challenges the pilot encountered on this track and how each was addressed.

Challenge	How the pilot addressed it
Finalizing the new electrical load. Scopes of work often change through program development and homeowner decisions, which alters the final electrical load.	Homeowners work with the administrator to finalize the scope of work through the Homeowner Agreement before the application is submitted.
Navigating PG&E applications. The application is a multi-step process requiring full home documentation.	The administrator works closely with PG&E representatives to navigate the process and keep communication thorough.
Application processing delays. Processing can take up to 30 days, and applications can be dropped if documentation misses its due date.	The administrator coordinates with PG&E representatives and the City permit office for application extensions when deadlines are at risk.
Installation coordination. PG&E must disconnect and reconnect power, and the City must complete its inspection, on the same day to avoid a delayed power shut-off.	The approved City permit is obtained first, so the inspection can be scheduled before service work is scheduled with PG&E.
Program budget. Engineering advance fees range from $2,500 to $3,500 and may include additional costs for trenching.	The program deploys PG&E service upgrades only when absolutely necessary, prioritizing load management systems where they fit.

Documentation. The original guide, produced as a Q6/Q7 program deliverable, is on file with the City of Berkeley together with the pilot's application round tracker. This adaptation preserves its content for the published report.

Rebuilding Together East Bay Network

Just Transition Residential Electrification Pilot Program

Appendix II.F. GHG Reduction and ROI: Working Outcomes

Purpose and How to Read This Appendix

This appendix states the pilot's working outcomes for greenhouse gas reductions and program return on investment. The figures are modeled from the conversions actually installed, using the assumptions and method stated below; they are not measured results.

Per-intervention actuals will be read from utility bills collected over the months following each home's close-out, performance audits, and operational usage across a full heating season, and will be published in an addendum scheduled for release in mid-2027. The addendum follows the fiscal-year audit, which runs from September through December 2026, and the six-month monitoring period during which household habits settle into the new systems.

An editable companion workbook carries this calculation with every assumption in an editable cell, so the City or a qualified verifier can substitute its own factors and own the result.

Method

Net annual reduction is calculated per measure as the gas displaced (annual terms multiplied by the natural gas emission factor) minus the emissions from added electricity (annual kWh multiplied by the grid electricity factor), multiplied by the number of conversions installed. Conversion counts come from Appendix II.C, the pilot's authoritative per-home table, and include the partner-delivered conversions marked there.

Assumptions

Per-measure usage, applied to typical single-family homes in the East Bay's mild coastal climate:

Measure	Gas displaced (therms/yr)	Electricity added (kWh/yr)	Net kg CO2/yr per unit
Heat pump water heater	180	1,050	877
Heat pump HVAC	300	1,400	1,488
Induction range	30	275	139
Electric dryer	20	600	61

Factors:

Factor	Value	Source
Natural gas emission factor	5.31 kg CO2/therm	EIA, Carbon Dioxide Emissions Coefficients (Sept 2024), on the EPA GHG Inventory basis: 52.91 kg per MMBtu, or 5.29 kg per therm; within 0.4 percent of the value used
Grid electricity factor	0.075 kg CO2/kWh	Berkeley default electric supply through Ava Community Energy's largely carbon-free portfolio [verify against current Ava power-content label]; see the sensitivity note below

Factor	Value	Source
Equipment service life	15 years	For lifetime tons and ROI framing; conservative for heat pump equipment classes

Working Outcomes

Measure	Conversions installed	Net kg CO_2 avoided per year
Heat pump water heaters	16	14,033
Heat pump HVAC systems	25	37,200
Induction ranges	12	1,664
Electric dryers	2	122
Total	**55**	**53,019**

Comparison and ROI	Value	Basis
Contract target, annual kg CO_2 reduced	30,496 to 50,744	Contract #32400105 Scope of Work
Working outcome as share of the high target	104.5%	53,019 / 50,744
Lifetime reduction (metric tons CO_2)	795	15-year service life
Program ROI, dollars per lifetime metric ton	$1,886	Whole-program basis: $1,500,000 contract / 795 t. A measure-cost-only basis follows in the addendum

Displacement note. The counts assume each installation displaces a gas appliance. A small number did not: two heating systems entered homes without prior heat, and one induction range replaced a non-operable electric stove. The addendum's per-intervention actually will resolve the difference.

Benchmarks. The gas emission factor is verified against EIA's published coefficients (September 2024). The magnitude is consistent with E3, Residential Building Electrification in California (April 2019), which finds all-electric single-family California homes reduce total GHG emissions roughly 30 to 60 percent versus mixed-fuel homes on the 2020 grid; this workpaper implies roughly 2.6 metric tons per year for a whole-home package, within that band.

Sensitivity. The grid electricity factor is the dominant assumption. The value used reflects Berkeley's default supply through Ava Community Energy. At the regional grid average (EPA eGRID, CAMX subregion [verify current rate]), the working outcome falls to roughly 43,700 kg per year, about 86 percent of the high target; households on Ava's fully renewable product would sit above the stated outcome.

Rebuilding Together East Bay Network

Just Transition Residential Electrification Pilot Program

Appendix II.G. High Road Jobs: Wage Tracking

Purpose

This appendix documents prevailing wage compliance for the installation work performed under the pilot. Five contractors performed the permitted installation work: Kel-Aire and 1-888 Heat Pumps on HVAC scopes, Micah Electric and Net Electric on electrical scopes, and SolidRock on general contracting at three homes. Kel-Aire and Net Electric are union contractors. The record behind this appendix carries one row per worker, per home, per work period. As of close-out reporting it holds 136 verified wage rows covering 1,169.5 project hours and 26 workers on program payroll.

Homes are identified by their number in the program's canonical roster.

Working figures. These are working figures as of close-out reporting (July 30, 2026). The final Kel-Aire payroll runs (weeks ending 6/21, 7/19, and 7/24) enter the record during reconciliation, which runs through the end of August 2026. The full set is then certified through the single audit between September and December 2026 and reported in the December 2026 financial addendum.

Verification Method

Every wage row passed the same five checks before entering this record: the prevailing wage determination, the certified payroll form, the signed statement of compliance, the payroll journal or pay stubs, and the timesheet. HVAC classifications were checked against DIR determination R-166-104-1-2025-1 and electrical classifications against determination R-61-595-1-2025-1.

The program administrator supplemented the paper checks with unannounced site verifications on nine work days across all five contractors, confirming that the workers on the certified payroll were the workers on site. Each verification is listed in the Site Verifications table below.

Verified Wage Rows by Contractor

Contractor	Verified rows	Project hours	Workers	Homes (roster number)
Kel-Aire (HVAC, union)	58	422.5	6	7, 8, 9, 10, 11, 12, 13, 17, 19, 22, 29, 32, 41, 43
1-888 Heat Pumps (HVAC)	17	322	6	2, 7, 8, 10, 11, 14, 15, 16, 18, 19, 21, 25, 27, 28, 30, 32, 42, 44
Micah Electric (electrical)	41	234.79	10	5, 6, 7, 8, 9, 11, 12, 17, 32, 41, plus assessment-stage evaluations (see note)
Net Electric (electrical, union)	11	96	2	14, 15, 16, 18, 21, 22, 24, 25, 26, 27, 28, 29, 30, 31

Contractor	Verified rows	Project hours	Workers	Homes (roster number)
SolidRock (general contracting)	9	94.2	2	19, 20, 23
Program total	**136**	**1,169.5**	**26**	

On the 1-888 hours. 1-888 Heat Pumps' February and March work was verified at the pay period level, the form their certified payroll takes for those weeks. Every pay period passed the same five checks, and those weeks' hours are carried in the 322 hour total above.

Wages Paid Against Required Rates

Contractor	Classification (DIR determination)	Base rate	Fringe or cash in lieu	Total package
Kel-Aire	LCACP (R-166-104-1-2025-1)	$49.37	$31.84	$81.21
Kel-Aire	LCAC1 (R-166-104-1-2025-1)	$25.01	$20.87	$45.88
Kel-Aire	LCACS (R-166-104-1-2025-1)	$47.83	$25.44	$73.27
Kel-Aire	LCSRV (R-166-104-1-2025-1)	$60.00	$37.53	$97.53
1-888 Heat Pumps	Residential AC Pro; $49.00 paid against $40.55 required	$49.00	$31.00	See note
Micah Electric and Net Electric	Inside Wireman (R-61-595-1-2025-1); $76.00 paid against $76.00 required	$76.00	$50.52	$126.52
Net Electric	Inside Wireman 2-A, apprentice period rate	$32.30	$24.78	$57.08

Base wages met or exceeded the applicable DIR minimums on every verified row. Kel-Aire and Net Electric are union shops and paid their crews on the applicable union scale. 1-888 Heat Pumps paid $49.00 against a required $40.55. The electrical contractors paid the Inside Wireman scale at rate. Net Electric's second worker was carried on the 2-A apprentice period rate for the full engagement.

Site Verifications

Date	Contractor	Home
2/11/2026	1-888 Heat Pumps	Home 16
2/12/2026	Kel-Aire	Home 13
3/5/2026	1-888 Heat Pumps	Home 21
3/9/2026	Kel-Aire	Home 19
3/18/2026	Kel-Aire	Home 22
3/27/2026	Micah Electric	Home 32
4/24/2026	Net Electric	Home 25

Date	Contractor	Home
5/8/2026	Micah Electric	Home 12
Within the 2/18 to 5/19/2026 work period	SolidRock	Home 20

Notes on the Record

Three readings were settled in preparing this appendix and are noted here so the record stays legible at audit. Micah Electric's January 25 entries include uniform three hour rows across seven homes, including one home that was assessed but did not enroll; these reflect assessment-stage electrical evaluations rather than installation work. Kel-Aire's verification sheets show two fringe values for the LCACP classification with an identical total package of $81.21; the total package governs the compliance reading. Two workers appearing on separate contractor sheets belong to the same household, Home 8.

Source Documents

Contractor	Verification document	Coverage
Kel-Aire	Kel-Aire Payroll Verification	1/26/2026 through 5/22/2026
1-888 Heat Pumps	888 Payroll Verification	2/2 through 3/15/2026 and 4/23 through 5/19/2026
Micah Electric	Micah Electric Payroll Verification	1/16/2026 through 5/8/2026
Net Electric	Net Electric Payroll Verification	4/24/2026 through 6/5/2026
SolidRock	SolidRock Payroll Verification	2/18/2026 through 5/19/2026

Note. The five verification documents above sit with the certified payroll forms, statements of compliance, payroll journals, and timesheets in the program's payroll records. The full 119-item source inventory is indexed in the Canonical Payroll Data Sheet, All Contractors.