

GIFT AGREEMENT

JOSIE GAILLARD AND TOM KABAT (“Donor”) agree to make a gift of pro bono consultant services to the COUNTY OF SAN MATEO (“County”), in accordance with the terms of this gift agreement dated November 9, 2021 (“Agreement”). By signing this Agreement Donor and the County agree to the terms and conditions set forth below.

The County of San Mateo Office of Sustainability is developing home electrification case studies under the Bay Area Regional Energy Network (BayREN) Single-Family Residential sub-program to collect and share information about the costs and options for converting existing single-family homes to be all-electric. The goal of the case studies project is to provide residents with information regarding strategies and costs to switch from gas appliances to electric ones in their homes, in order to help meet the County’s climate action goals.

County staff conducted a Request for Qualifications (RFQ) process to select a consultant for the home electrification case studies. Staff released the RFQ on March 23, 2021 and closed the solicitation process on April 16, 2021. Nine applications were received. The review committee consisted of four individuals with program and topic-area expertise and included both Office of Sustainability staff and external public agency and program implementer partners. The committee invited the top two proposers to participate in interviews and scored the proposers according to criteria outlined in the RFP. The committee ranked Josie Gaillard and Tom Kabat’s proposal as the best overall due to their qualifications, experience, and innovative approach to the home electrification case studies.

Following the close of the RFQ, Josie Gaillard and Tom Kabat offered to provide a gift of pro bono consultant services, valued at approximately \$20,000, to prepare home electrification case studies. Josie and Tom are members of the Menlo Park Environmental Quality Commission, and they made this decision out of an abundance of caution to avoid any appearance of conflict.

A. Gift Subject to acceptance and approval by the San Mateo County Board of Supervisors, Donor shall provide a gift of pro bono consultant services to the County by completing the scope of work set forth in Attachment A.

B. Purpose of Gift

1. This gift of pro bono consultant services shall be used to complete home electrification case studies, including coordination of the case study process, finalization of selection of 10 homes to study, site visits of homes, completion of case studies and a final case study report, and presentation about the case study project at the BayREN Forum.

For Donor:



Donor Signature

10/18/2021

Date

Josephine T Gaillard

Donor Name (please print)



Donor Signature

10/18/2021

Date

Tom Kabat

Donor Name (please print)



For County:



Purchasing Agent Signature
(Department Head or
Authorized Designee)
County of San Mateo

10/20/21

Date

Carolyn Bloede

Purchasing Agent Name (please print)
(Department Head or **Authorized** Designee)
County of San Mateo

Director, Office of Sustainability

Purchasing Agent or **Authorized** Designee
Job Title (please print)
County of San Mateo

Attachment A

Project scope:

1. Task 1: Coordinate case study project.
 - Subtask 1a: Participate in weekly calls with County to report on case study progress and incorporate County input throughout the project.
 - Subtask 1b: Develop templates for “current conditions brief/pricing template,” “electrification pathways” document, and “case studies.” For “current conditions brief/pricing template,” include fields for notes about the homeowner’s goals and preferred electrification strategy, documentation about the home’s equipment (including notes, photos, and videos), and fields for building professionals to enter their pricing and cost considerations. For “electrification pathways” document template, include fields to indicate the cost of each project/piece of equipment (break out equipment vs. labor costs) and pricing for each electrification strategy (all at once vs. over time). For “case studies” template, include fields for information about the homeowner and jurisdiction in which the home is located, photos and links to videos about the homes and homeowners, building professional quotes, and final home electrification recommendations.

Task 2: Help County finalize selection of 10 homes to study. County will conduct outreach to gather a pool of applicants. County and Donor will meet one or two times to review applicants and agree on the 8-10 to move forward with.

Deliverables: Template for “current conditions brief/pricing template,” template for “electrification pathways” document, and template for “case studies”

2. Task 3: Conduct site visits of 8-10 homes and write case studies. When conducting visits to homes, Donor must follow all current safety protocols regarding COVID-19 as specified by the Centers for Disease Control and Prevention and comply with all local health official orders.
 - Subtask 3a: Meet with homeowners to discuss their current energy use, electrification goals, and opportunities for improving their home’s energy performance. Discuss multiple strategies for electrifying the home, including both electrifying all at once and electrifying one system at a time, over time.
 - Subtask 3b: Take photos of existing equipment; document spatial conditions with photos, videos, and/or text. Take photos and video testimonials of the homes and homeowners for use in the case studies. Coordinate with three or more building professionals to provide information to them via “current conditions brief/pricing template” about existing home conditions that will inform home project quotes that building professionals will provide. Schedule video calls and/or in-person visits with homeowners as needed with building professionals.
 - Subtask 3c: Complete a Home Energy Score (including Electrification Checklist) for each home. (See <https://www.bayren.org/home-energy-score-assessors> for information. Donor will be eligible for \$300 rebate from BayREN for each Score/Checklist.)
 - Subtask 3d: Collect completed “current conditions brief/pricing templates” that contain project quotes from building professionals and fill in “electrification pathway” document for each home. Work with building professionals to have them, in addition to providing costs for electrification of homes, provide pricing for replacing existing gas appliances with new gas appliances, in order to demonstrate the comparative cost of electrification. Calculate the initial cost and operational cost over time for each electrification strategy. Debrief with building professionals. Determine the most cost-effective approach that best meets the homeowner’s goals. Indicate

- the range of prices given by building professionals and provide brief explanation for the variations.
- Subtask 3e: Refine each “electrification pathway” document based on homeowners’ feedback. Talk with each homeowner about their “electrification pathway” document and answer their questions. Update the document based on their feedback.
 - Subtask 3f: Format findings in each “electrification pathway” document to produce 8-10 two- to four- page “case studies.” Incorporate visuals such as photos and graphics in “case studies.”

Deliverables: 8-10 case studies of two- to four- pages each that include information about the homeowner and jurisdiction in which the home is located, photos and links to videos about the homes and homeowners, building professional quotes, and final home electrification recommendations

3. Task 4: Produce final case study report. Provide basic information about home electrification considerations by referencing other published information (Redwood Energy’s Pocket Guide to Home Electrification, Silicon Valley Clean Energy’s website, etc.). Incorporate 8-10 “case studies” and include videos and photos of homes as applicable. Appendix includes “current conditions brief/pricing template” and “electrification pathway” template. Afterwards, participate in online debrief session with building professionals and County. Share insights about the process, including insights about pricing and approaches for home electrification.

Deliverables: Final case study report

4. Task 5: Participate in presentation about the case study project to the BayREN Forum (September 1, 2021).

Deliverables: Final presentation slide deck for the BayREN Forum