Equity in Research and Development
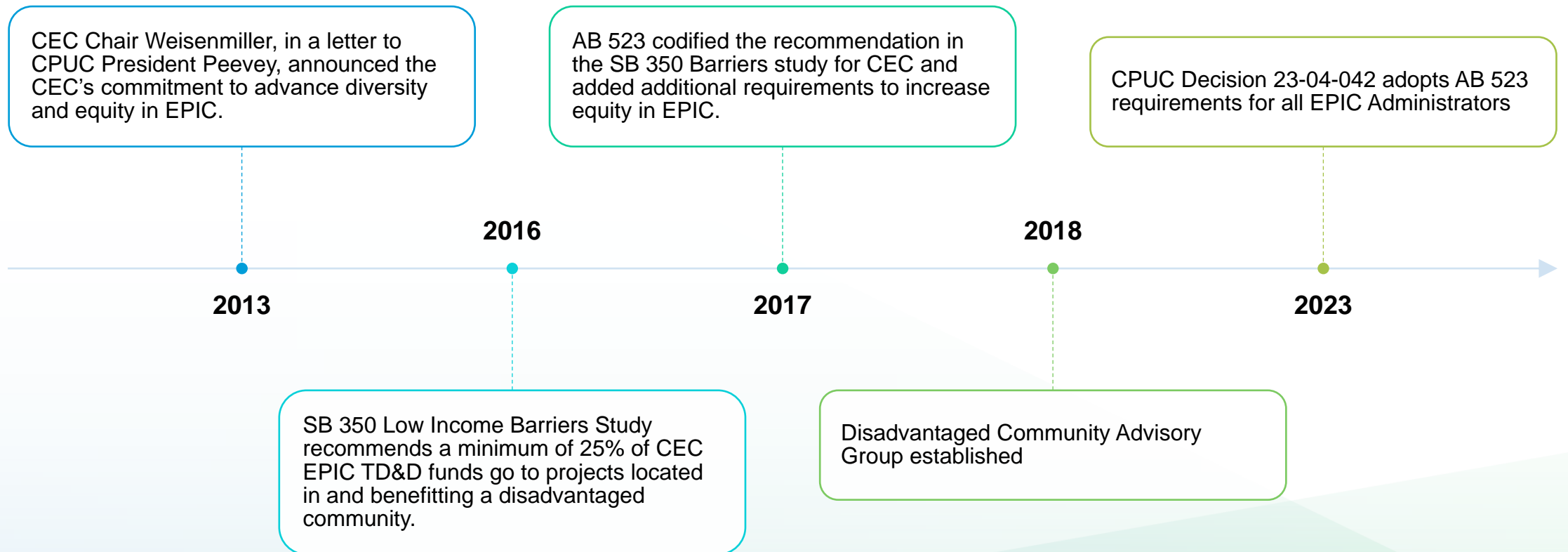
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California Energy Commission

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Policy Direction: Equity in EPIC

CEC Chair Weisenmiller, in a letter to CPUC President Peevey, announced the CEC's commitment to advance diversity and equity in EPIC.

AB 523 codified the recommendation in the SB 350 Barriers study for CEC and added additional requirements to increase equity in EPIC.

CPUC Decision 23-04-042 adopts AB 523 requirements for all EPIC Administrators

2016

2018

2013

2017

2023

SB 350 Low Income Barriers Study recommends a minimum of 25% of CEC EPIC TD&D funds go to projects located in and benefitting a disadvantaged community.

Disadvantaged Community Advisory Group established

R&D Equity Strategy

Investment Plan Development

- Conduct extensive stakeholder outreach

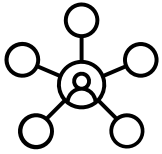- Leverage and align with policy guidance – DACAG Equity Framework

Outreach and Engagement

- Participated in outreach and community events.

- Created and distributed funding materials translated for non-English speakers

- Created and published a "How to Apply for Research Funding" video for new applicants.
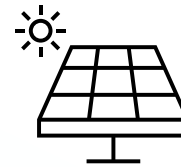
R&D Equity Strategy

Solicitation Scoping

- Funding set-asides or preference points

- Design funding to address specific issues facing ratepayers in vulnerable communities

- Require to have community involvement for projects located in under-resourced communities

Proposal Evaluation

- Implemented equity specific evaluation criteria

Project Management

- Active project management to ensure commitments are fulfilled

Impacts of EPIC R&D

- Project-Level
  - Measures the scientific and technological advancement from a project
- Portfolio-Level
  - Measures benefits to ratepayers from EPIC investments around critical portfolio topics
  - Evaluates how EPIC projects have overcome key barriers (qualitative)
- Program-Level (Key Performance Indicators)
  - Measures the overall success and impact of the program

Project-Level Impacts

- What does success look like for the project:
  - Technology Performance
  - Economics
  - Manufacturing
  - Programmatic

- Will vary greatly depending on the project

- Mix of quantitative and qualitative metrics

Portfolio-Level Impacts

- Group projects by common areas
  - Building electrification
  - Vehicle-grid integration
  - Microgrids
  - Battery technology

- Aggregate impacts if appropriate

- Identify gaps

Program-Level Impact

Impact Category	Quantifiable Impacts
Technology Development and Commercialization	• Follow-on private investment • Leveraged public funding • Number of commercialized technologies
Technology Diffusion	• Number and geographic distribution of project sites (technology learning) • Connections of stakeholders in EPIC's recipient network • Codes and Standards improved by EPIC projects
Knowledge Generation and Dissemination	• Number of publications and citations • Number of online tools and the count of their usership • EPIC Symposium attendance
Diversity, Equity and Inclusion	• Percentage of TD&D funding in under-resourced communities • Diversity of funding recipients • Outreach and community events held
Economic Impact	• Economic Output • Job Growth

Diversity, Equity, and Inclusion Impacts in EPIC

- 70% of EPIC Technology Demonstration and Deployment funds have gone to projects located in and benefiting low-income or disadvantaged communities.

- Over 30 EPIC funding opportunities have included specific funding set-aside or bonus points for locating projects in low-income or disadvantaged communities

- Over $22 million has gone to projects benefitting California Native American Tribes, including the world-renowned microgrid at the Blue Lake Rancheria in Humboldt County.

- 22 percent of EPIC agreements include a women-, minority-, or LGBTQ-owned business as the prime recipient or a subcontractor.

- CEC staff and EPIC recipients participated in over 100 outreach and community events to promote knowledge about EPIC funding opportunities.

Lessons Learned

Issue/Lesson Learned	CEC Action Taken/Planned
Communities felt like an afterthought in projects	- All AB 523 projects require a CBO on project team and funding for engagement - Scoring criteria to better assess the potential for projects to benefit disadvantaged- and low-income communities - Training for CEC staff to better evaluate project benefits for DAC/LI communities
Information overload/ receiving information not relevant to their interests	- Centralize and curate information on Equity Opportunities. - Provide visibility into who the technology solution providers are
Need to actively cultivate relationships and partnerships	- Longer lead times for project/technology developers and communities to build relationships - Take a more active role in creating opportunities for networking
Need for additional training on EPIC	Events will provide targeted training on how to participate.

Thank You