

DOCKETED

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Electric Program Investment Charge (EPIC)

Strategic Planning Process

Disadvantaged Communities Advisory Group
September 15, 2023

California Public Utilities Commission (CPUC)

Energy Division, Climate and Equity Initiatives Section
Fredric Beck, Senior Analyst



**California Public
Utilities Commission**

*The EPIC program is funded by California utility customers under
the auspices of the California Public Utilities Commission*

EPIC's Mission Integrates Equity

Mission Statement: EPIC invests in innovation to ensure equitable access to safe, affordable, reliable, and environmentally sustainable energy for electricity ratepayers.

- **CPUC:** Establishes EPIC policy and planning criteria; approves 5-year cycle EPIC Investment Plans; reviews Administrator Annual Reports; and implements a program evaluation on a cycle basis to inform EPIC improvements
- **CEC:** Administers 80% funds in all three EPIC categories:
 - Applied Research and Development
 - Technology Demonstration and Deployment (TD&D)
 - Market Facilitation
- **IOUs:** Administers 20% funds in only one EPIC category:
 - Technology Demonstration and Deployment

Refined EPIC Guidance for Measurable Strategic Planning (D.23-04-042)

Requirement	Description
Strategic Goals and Objectives	<ul style="list-style-type: none"> Establish clear, measurable, and reasonable program-level goals and administrator-level objectives aligned with achieving the State's climate and equity goals, including guidance by the DER Action Plan
Equity	<ul style="list-style-type: none"> Utilize ESJ Action Plan and Justice40 to guide investment plans Continues AB 523 DAC allocation requirements for TD&D projects and expands to IOUs
Uniform Impact Analysis Framework	<ul style="list-style-type: none"> Establishes a process to develop criteria and reporting of project impacts on a consistent basis, including equity
Program Evaluation	<ul style="list-style-type: none"> Establishes a process to assess current program progress and compliance Improves oversight by requiring an Advice Letter for Annual Reports and Database compliance; funds ongoing database updates and improvements

EPIC Strategic Planning through 2024

Timeframe	Activity
<p>Aug – Dec 2023</p>	<p><u>Establish Strategic Goals</u></p> <ul style="list-style-type: none"> • CPUC receives stakeholder input via workshops • Workshop reports distributed to participants for technical correction • Energy Division Staff proposal issued for comment via Ruling • CPUC Issues Proposed Decision establishing Strategic Goals
<p>Oct 2023 – Aug 2024</p>	<p><u>Launch Program Evaluation and Impact Analysis Framework</u></p>
<p>Jan – Jul 2024</p>	<p><u>Establish Strategic Objectives</u></p> <ul style="list-style-type: none"> • Stakeholder workshop process similar to Strategic Goals resulting in staff proposal for comment via Ruling
<p>Oct – Nov 2024</p>	<p><u>Proposed Decision</u></p> <ul style="list-style-type: none"> • Synthesizes record for Strategic Goals/Objectives, Impact Analysis, Program Evaluation for EPIC 5 Guidance Decision (2026-2030)

Kickoff Workshop: Defined Criteria for Establishing Strategic Goals (S.F., Aug 16)

Pathways	Set of critical actions necessary to support meeting the State's 2045 energy, climate, and equity goals via the most effective strategies and technology innovation
Gaps	Key challenges for achieving zero carbon goals and how RD&D should be prioritized to address opportunities and barriers more quickly along critical pathways
Roles	The best-positioned stakeholders (ratepayers, state, federal, academic, private sector) to lead innovation investment addressing identified gaps, including through coordination and collaboration
Outcomes	Clear, measurable, and reasonable targets for developing EPIC portfolios and used in program evaluations to measure impacts of EPIC in supporting achievement of California's 2045 goals

Kickoff Workshop: Identified Innovation Pathways

EPIC Innovation Pathways	Related CPUC Proceedings	DACAG Priorities
Overarching Themes	R.18-04-019 R.20-08-022	<ul style="list-style-type: none"> • Long-term Planning • Affordability • Community / Tribal Engagement
Grid Modernization	R.13-11-005 R.18-12-006 R.19-09-009 R.21-06-017	<ul style="list-style-type: none"> • Transportation Electrification • Reliability / Flexibility / Resiliency • DERs • Energy Impacted and Impacting Services
Changing Paradigms of Electrification	R.19-01-011	<ul style="list-style-type: none"> • Building & Industrial Decarbonization • Electrification, and Gas Transition
Emerging Strategies	R.20-05-003	<ul style="list-style-type: none"> • IRP and Long-term Planning • Clean Hydrogen

Equity Workshop: Ensuring Everyone Benefits from Innovation Investments (S.F., Aug 17)

Overview:

- **Attendance:** Nearly 130 participants, 16 panelists
- **Topics:** Current investments, Equity Frameworks/Principles, Equity Benefits
- **Perspectives:** Broad range of perspectives presented including community, tribal, academia, DACAG, Justice40, Equity Frameworks
 - **Early Engagement:** Need for community engagement before projects are developed
 - **Tribal Participation:** Many small CA tribes are unaware of EPIC opportunities and lack resources to pursue them
 - **Best Practices:** Several equity frameworks and principles should be considered in developing equity metrics

Pathway Workshops: Grid Modernization (L.A., Sep 6-7)

Overview:

- **Attendance:** Nearly 200 participants, 16 panelists
- **Topics:** Transportation Electrification, DERs, Reliability, Resilience
- **Perspectives:** Broad range of perspectives, including customer, community, safety, federal/state coordination, academia, industry, utility
 - **Customer Experience:** Key to success, several tools are available to assess vulnerable community needs
 - **Transportation Electrification:** Reducing air pollution health impacts
 - **DERs / Microgrids:** Essential to support reliability and independence for disadvantaged and remote communities
 - **Process Strategies:** Consider efficiencies and promote affordability such as for interconnection, standardization, processing large data

Upcoming Strategic Goals Workshops

September 19

10 am – 4 pm: The Built Environment

- Customer Focused Solutions
- Building Decarbonization, including Hydrogen
- Electrification and the Coordinated Role of Gas

September 20

1 pm – 4:30 pm: Emerging Strategies

- **Emerging Technologies** (e.g., offshore wind; geothermal; green hydrogen; carbon capture, use & sequestration)
- **Emerging Strategies** (e.g., standards; process efficiencies; streamlining for affordability; Artificial Intelligence (AI) and large data; customer experience)

How DACAG Members Can Contribute to EPIC Strategic Planning Improvements

- Participate in strategic planning and metrics development workshops as panelist or attendee
- Provide DACAG letter to CPUC
- Engagement of DACAG EPIC Subject Matter Experts

CPUC Public Information Resources

Contact

- CPUC Public Advisor's Office
Telephone: 1 (866) 849-8390
public.advisor@cpuc.ca.gov

EPIC Strategic Planning Resources

epicpartnership.org

Past Workshops

- Workshop Presentations
- Workshop Videos
- Workshop Summaries

Future Workshops

- Workshop Agendas
- Registration for our future workshops!

Appendices

Kickoff Workshop Panelists, Aug 16, 2023 (S.F.)

Panel	Panelists
<p>Introduction</p>	<ul style="list-style-type: none"> • Foundation of Previous EPIC Strategic Planning – Andrew Barbeau, CPUC Consultant: Accelerate • Defining Strategic Goals – CPUC Energy Division, Fred Beck
<p>Perspectives on Innovation Needs</p>	<ul style="list-style-type: none"> • Innovation in CPUC Proceedings - Leuwam Tesfai, Energy Division • Innovation for CA’s Energy Goals - Duncan Calloway, U.C. Berkeley • Barriers to Climate Goals: Affordability Crisis – Adria Tinnin, TURN • Critical Role of R&D – Peter Miller, NRDC
<p>Perspectives from Other Energy R&D Efforts</p>	<ul style="list-style-type: none"> • R&D Strategic Planning - Gil Bindewald, U.S. DOE • Current Investments & Future Direction - John Lockner, NYSERDA • Inside the Moonshot Factory - Lisa Epifani, X, The Moonshot Factory • Washington State’s Clean Energy Fund - Brian Young, Dept. of Commerce
<p>Perspectives from EPIC Administrators</p>	<ul style="list-style-type: none"> • California Energy Commission – Anthony Ng • PG&E – Dan Gilani • SCE – Tony Johnson • SDG&E – Cynthia Carter

Equity Workshop Panelists, Aug 17, 2023 (S.F.)

Panel	Panelists
Introduction	<ul style="list-style-type: none"> • CPUC's ESJ Action Plan - Amanda Krantz, CPUC Energy Division • Equity for Tribes - Kenneth Holbrook, CPUC Tribal Advisor
Equity in EPIC Portfolios	<ul style="list-style-type: none"> • EPIC Administrators - CEC, PG&E, SCE, SDG&E
Equity Frameworks and Principles	<ul style="list-style-type: none"> • Greenlining Equity Framework - Sneha Ayyagari, Greenlining • DACAG Equity Framework – Andres Ramirez, Mobility Justice • IOU Climate Adaptation Vulnerability Assessments and Community Engagement Planning - Anuj Desai, SCE • Justice40 - James Strange, U.S. DOE
Equity Benefits in RD&D	<ul style="list-style-type: none"> • Energy Justice & Metrics - Daniel Coffee, UCLA • CalEnviroScreen - Walker Wieland, OEHHA • Community Perspective - Eddie Price, S.D. Urban Sustainability Coalition • Measuring Equity Benefits - Holmes Hummel, Stanford • Tribal Perspective - Thomas Steirer, Alliance for Tribal Clean Energy

Grid Modernization Workshop Panelists, Sep 6, 2023 (L.A.)

Panel	Panelists
<p>Transportation Electrification</p>	<ul style="list-style-type: none"> • Building an Inclusive Green Economy - L.A. Cleantech Incubator, Jack Symington • Smart At-Home Charging - Philip Kobernick, Peninsula Clean Energy • Optimal Operations/Charging of Electric Bus Fleets - Rajit Gadh, MOEV • National Renewable Energy Lab - Eric Wood • PG&E - Damian Inglin • NUVVE - Rachel Zook • V2X Applications - Rima Oueid, U.S. DOE, Office of Technology Transition • Approach to Equitable Clean Mobility - Rachael Aptowitz, GRID Alternatives
<p>Distributed Energy Resources (DER) Integration</p>	<ul style="list-style-type: none"> • CPUC DER Action Plan - Gabe Petlin/Masoud Foudeh/Julian Enis, Energy Division • Long Duration Energy Storage, Haresh Kamath, EPRI • SDG&E - Michael Colburn • PG&E - Damian Inglin • DER Integration - David Carter, Schatz Energy Center • DER Interconnection - Rachel McMahan, CA Energy Storage Alliance • Cybersecurity - Tom Tansy, Sun Spec Alliance • GRID Alternatives - Dan Dumovich

Grid Modernization Workshop Panelists, Sep 7, 2023 (L.A.)

Panel	Panelists
<p>Reliability</p>	<ul style="list-style-type: none"> • Reliably Reaching CA's Clean Electricity Targets – Priya Sreedharan, Gridlab • SCE - Anthony Johnson • Needs of Homes and People - Marc Costa, The Energy Coalition • Fundamental Challenges of DER Valuation - Miguel Heleno, Lawrence Berkeley National Lab
<p>Resiliency</p>	<ul style="list-style-type: none"> • Asian Pacific Environmental Network - Ameer Raval • Grid Scape - Vipul Gore • Improving the Cost of LDES - Gabe Murtaugh, Long Duration Energy Storage Council • Value of Resilience - Olga Hart, Sandia National Lab • SCE - Anthony Johnson • Improving Resiliency through R&D - J.D. Saucedo, County of Santa Barbara • SDG&E - Michael Colburn • EPRI - Andrew Coleman • Resilience Modeling & Resource Planning - Kailash Raman, Form Energy • Integrated Climate Adaptation & Resilience - Ben McMahan, CA Governor's Office of Planning and Research