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## **EPIC TD&D Investments in Under-resourced Communities**

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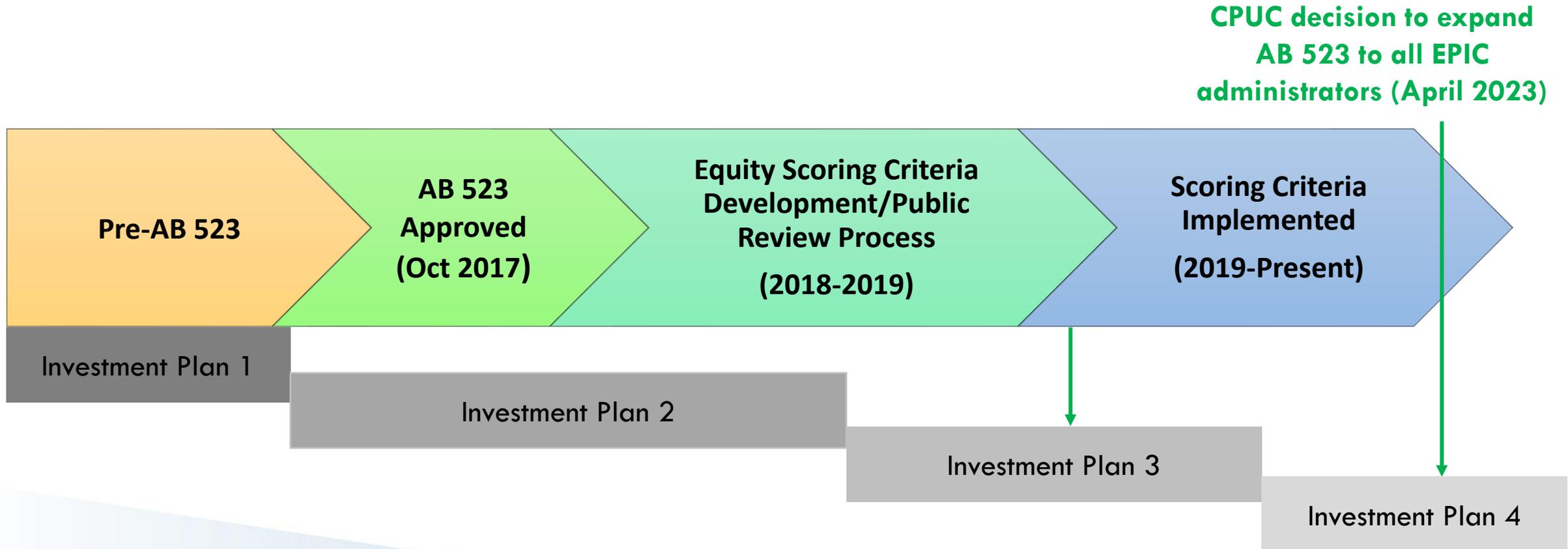
# Background on AB 523

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- Assembly Bill (AB) 523 was approved in October 2017.
- Sets minimum allocation amounts for CEC's EPIC Technology Demonstration and Deployment (TD&D) funding:
  - At least 25% of funding must be located in, and benefiting, disadvantaged communities.\*
  - At least 10% of funding must be located in, and benefiting, low-income communities.\*
- Requires the CEC's EPIC program to take into account adverse localized health impacts of proposed projects to the greatest extent possible.

\*AB 523 (Statutes of 2017) defines disadvantaged communities using the CalEnviroScreen and low-income communities at or below 80% of state median income levels.

# CEC Implementation of AB 523



# CEC's TD&D Equity Project Requirements

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TD&D solicitations providing carve-outs for investments and benefits to disadvantaged and low-income communities MUST include:

- A community partner.
  - Proposed organizations are evaluated on a variety of factors (e.g., location, experience with project deployment and outreach, mission statement, business type, etc.)
- Budget allocation for community partner engagement, relevant to the tasks stated in the proposed scope of work.

# CEC's EPIC Equity Scoring Criteria for TD&D Solicitations with Carve-Outs

Scoring Criteria		Maximum Points
8	Benefits to Disadvantaged/Low-income Communities and Localized Health Impacts	
8.1	Benefits to Disadvantaged/Low-income Communities	15
8.2	Community Engagement Efforts	10
8.3	Localized Health Impacts	15
8.4	Technology Replicability	5
8.5	Project Support Letters	5
Total Possible Points for Criteria 8 (Minimum Passing Score for Criteria 8 is 70% or 35.00)		50
*Total Possible Points for Proposal (including Technical Approach, Team Qualifications, Budget )		150

# CEC EPIC Methodology for Calculating Equity Investments

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- Use of project site level data.
  - Agreements can have several projects.
  - Designations of site location using the CalEnviroScreen and the California Climate Investments Priority Populations 2023 mapping tools.
  - Projects that are designated as both a disadvantaged and low-income community are counted as a disadvantaged community.
- For agreements with split funding between investment areas and/or with multiple project sites, only the relevant portion of TD&D funding is used in calculations.

# CEC EPIC TD&D Equity Investments Through 2022

Investment Plan	% Disadvantaged Community	Disadvantaged Community Site Count	% Low-income Community	Low-income Community Site Count
<b>EPIC 1 (2012-14)</b>	34%	89	25%	31
<b>EPIC 2 (2015-17)</b>	29%	36	42%	42
<b>EPIC 3 (2018-20)*</b>	55%	77	20%	58
<b>EPIC 4 (2021-25)**</b>	51%	6	23%	3
<b>Totals</b>	<b>41%</b>	<b>208</b>	<b>29%</b>	<b>134</b>

\*AB 523 was implemented

\*\*Data is only reflective of active project sites through December 31, 2022.

# CEC EPIC Equity Project Benefits and Reporting

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- CEC collects self-reported benefits and performance metrics from recipients.
  - Technical Advisory Committees provide input on the performance metrics.
  - CEC is working to expand our metrics and analyses.
- CEC provides updates on TD&D investments in the EPIC annual report which is submitted to the CPUC and Legislature each April.
- The CPUC updates their EPIC database each year based on data from CEC and IOU administrators.

# Questions & Next Steps

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- Coordinate with the CPUC to resolve any data availability or filtering issues on the main EPIC project database website.
- Welcome feedback on Equity Scoring Criteria and suggested equity metrics as we enter into the EPIC 5 Investment Plan development process.
  - Equity Scoring Criteria and benefits metrics may be further shaped by CPUC Strategic Goals & Objectives process and related decisions on EPIC Equity Framework and Impact Evaluation Framework
- For questions on CEC investments, contact: Rachel Salazar at [Rachel.Salazar@energy.ca.gov](mailto:Rachel.Salazar@energy.ca.gov)