SOCALGAS RESEARCH, DEVELOPMENT & DEMONSTRATION EQUITY ENGAGEMENT ROADMAP

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SoCalGas

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1 Executive Summary

Backed by forward-thinking energy and environmental policy, countries around the world are developing scalable, effective, and increasingly affordable clean energy and clean transportation solutions. More and more people, businesses, and governments are adopting these solutions, driving costs down and gaining increased confidence in the new technologies being developed.

These efforts are paying off. In the last 10 years, the price of solar electricity has dropped by 89% and the price of wind electricity by 70%.[1] Major U.S. cities have committed to buying clean energy by 2025.[2] Businesses are on board too. Nearly half of the largest companies in the U.S. now recognize that they have a responsibility to tackle climate change and help preserve the planet for future generations.[3]

Despite this progress, however, there is still more to do, particularly for historically disadvantaged and marginalized communities.

Recognizing the role that it can play in mitigating some of the negative impacts of climate change on these communities—and in response to input received from community and agency stakeholders, including the California Public Utilities Commission (CPUC)—the Southern California Gas Company Research, Development, & Demonstration Department (SoCalGas RD&D) has developed an Equity Engagement Roadmap (EER).

Context	Community	Culture
Obtain Situational Awareness	**Increase Community Engagement**	**Institutionalize Diversity, Equity, & Inclusion**
• **Task 1:** Monitor and report key RD&D Equity Engagement project metrics in the RD&D Annual Report	• **Task 3:** Establish a stipend program to encourage CBOs and other stakeholders to participate in the RD&D Public Workshop	• **Task 5:** Commit to review/revise RD&D literature to include ESJ language
• **Task 2:** Regularly assess the effectiveness of Equity Engagement Roadmap activities	• **Task 4:** Provide funding and mentoring support to senior design projects	• **Task 6:** Review/revise RD&D project policies to include DEI components

Figure 1: SoCalGas RD&D identified three key themes and six associated tasks.

Designed to clearly communicate with both the public and government agencies, this document describes a multi-year vision for improving equity engagement within SoCalGas RD&D. The ultimate goal of this engagement is to maximize the likelihood that the benefits of new, clean energy technology positively and equitably impact all

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[1] https://www.goodgoodgood.co/articles/climate-change-good-news-roundup
[2] https://www.mic.com/impact/climate-change-good-news
[3] https://www.worldwildlife.org/stories/the-good-news-about-climate-change

communities within California, with special consideration for those communities that have been historically under-resourced.[4]

The EER incorporates input from an extensive literature review and numerous stakeholders, including many representatives from Environmental & Social Justice (ESJ) communities and internal stakeholders.

SoCalGas RD&D will use the EER to guide its ongoing engagement efforts and to develop, update, and track equity engagement metrics that SoCalGas leadership, the CPUC, and the public can use to evaluate the degree to which the projects supported by SoCalGas RD&D address inequities related to climate, income, and race/ethnicity, age, and other diversity dimensions in the communities served by SoCalGas.

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[4] Based on input received during the road-mapping engagement process, SoCalGas RD&D uses the term *under-resourced* rather than *underrepresented* or *underserved*.

2 Introduction

The urgency of climate action cannot be understated. Indeed, many studies have concluded that achieving ambitious decarbonization goals across all economic sectors will be necessary to avert climate catastrophe.[5, 6, 7]

For those in historically under-resourced and marginalized communities, the stakes are particularly high. Associated negative impacts—including heat waves, drought, wildfires, and flooding—can affect those groups more profoundly, not only because they lack adequate access to resources such as health care and insurance but also because they often live in areas subject to recurrent geo-hazards or with poorly developed infrastructure.

As a global leader in the energy space, SoCalGas recognizes this reality and its role in mitigating climate change. In 2021, SoCalGas announced ASPIRE 2045, a sustainability strategy that includes a commitment to net zero emissions in the company's operations and energy delivery by 2045.[8]

People	Purchasing & Supplier Diversity	Community Investments
The company's more than 8,000 employees mirror the diversity of the more than 21 million consumers in more than 500 Californian communities served by SoCalGas.	Working with culturally and ethnically diverse business owners is an integral part of SoCalGas' corporate strategy and benefits its suppliers and the local community.	SoCalGas' charitable investments and partnerships help create safe, healthy, and thriving communities. SoCalGas also strives to provide economic opportunities among under-resourced communities.

Figure 2: SoCalGas' Three Pillars of Engagement.

[5] https://unfccc.int/news/rapid-decarbonization-needed-to-prevent-climate-disaster
[6] https://www.nature.com/articles/d41586-021-00864-9
[7] https://www.ipcc.ch/2022/04/04/ipcc-ar6-wgiii-pressrelease/
[8] https://www.socalgas.com/sustainability/aspire-2045-faqs

SoCalGas also seeks to provide benefits to the communities it serves, including under-resourced communities.[9] For example:

- **The Climate Champions Grant Program:** This program invests up to $400,000 annually in programs, projects, and research that address community climate solutions in Southern California. This program is designed to encourage and foster clean, safe, and innovative solutions toward decarbonization, diversification, and digitalization toward a clean energy future.[10]
- **Community Donations:** In 2021, SoCalGas invested a total of $9.6 million in charitable causes, of which 70% was spent with nonprofits serving communities of color.[11]
- **Workforce Development:** SoCalGas funded six new or expanded workforce programs with organizations such as LA Urban League, Brotherhood Crusade, and Youth Action Project. The workforce training programs created opportunities for Black, Latino, Asian, and veteran populations within the company's service territory to gain a variety of jobs at SoCalGas.
- **Employee Engagement:** The SoCalGas Diversity, Equity & Inclusion (DEI) Department offers several ways for company employees to be involved, including five employee resource groups and counting, a Diversity & Inclusion Mentoring Program, an Annual Diversity & Inclusion Summit, and various community conversations, townhall events, and volunteer opportunities.
- **Supplier Diversity:** In 2021, SoCalGas spent $972.6 million—more than 42% of total purchases—with 577 culturally and ethnically diverse suppliers. This was the 29th year that SoCalGas exceeded the diverse spending goals set by the CPUC. To identify diverse suppliers, SoCalGas conducts outreach to local, regional, state, and national organizations and holds two Small Contractor Boot Camps each year aimed at diverse suppliers with under $5 million in revenue.[12]

These concrete commitments to sustainability, diversity, equity, and inclusion demonstrate the support that SoCalGas RD&D receives from company leadership in the development of the Equity Engagement Roadmap and its ultimate execution.

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[9] During the roadmapping process, stakeholders encouraged SoCalGas to share information about the benefits it provides to its employees and the communities it serves.
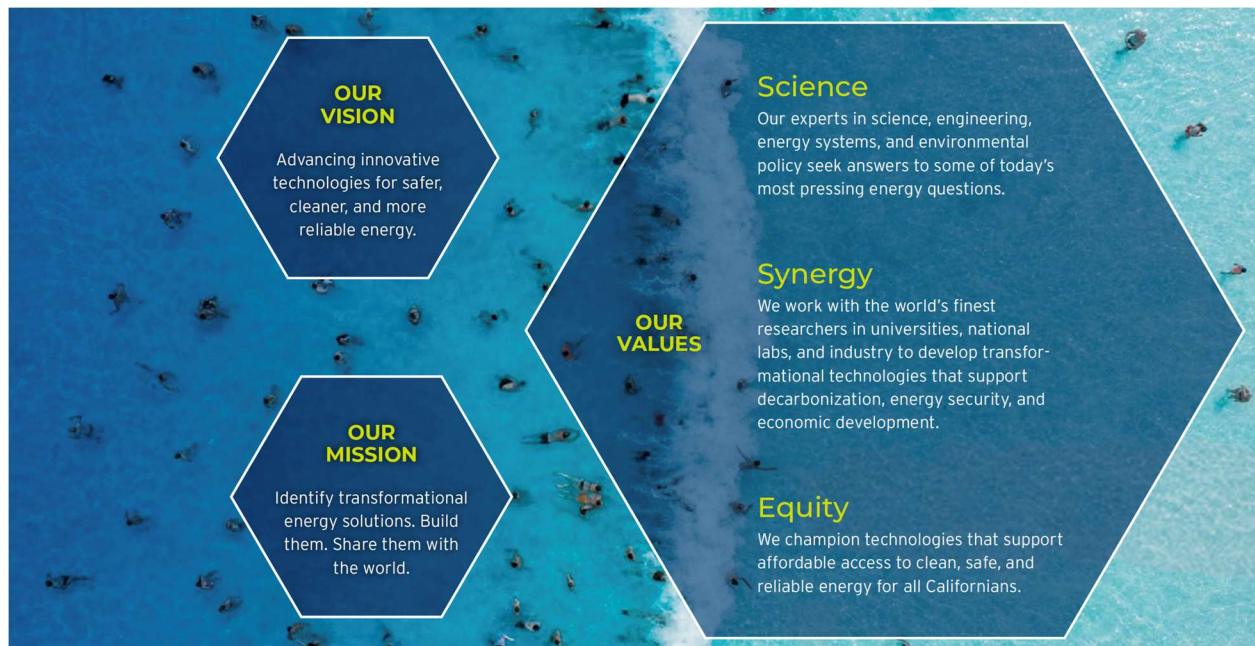
[10] https://socalclimatechampionsgrant.com/

[11] https://www.socalgas.com/our-community/empower

[12] https://www.socalgas.com/for-your-business/supplier-diversity

3 SoCalGas RD&D

SoCalGas RD&D is a department within SoCalGas that identifies and supports projects and technologies with the potential to save energy, reduce greenhouse gas (GHG) emissions, improve air quality, and increase the safety, reliability, and affordability of energy. Its vision is to advance innovative technologies for safer, cleaner, and more reliable energy. Its mission is to identify transformational energy solutions, build them, and share them with the world.

SoCalGas relies on its three values—science, synergy, and equity—when selecting the projects it funds every year. In 2022 alone, SoCalGas RD&D invested almost $14 million in hundreds of energy technology and clean fuels projects, allocated across five research program areas:

- **Low Carbon Research:** The primary goal of the Low Carbon Resources program area is to decarbonize the gas supply while maintaining its affordability and reliability. To accomplish this goal, program staff members develop, promote, and advance new technologies aimed at increasing the production of renewable gas to displace conventionally sourced pipeline gas, while limiting or recycling GHG emissions. This program area is further broken down into two research areas:
  - Carbon Capture, Utilization, and Sequestration
  - Renewable Gas Production
- **Gas Operations:** The Gas Operations RD&D program supports pipeline transportation and storage operations through innovations that enhance pipeline and employee safety, maintain system reliability, increase operational efficiency, and minimize GHG impacts to the environment. The program also supports technology development driven by emerging regulatory requirements. Its primary goals are to develop, test, and introduce new gas operations technologies that are beneficial to ratepayers through improvements in public and pipeline safety,

system reliability, operational efficiency, and environmental benefits. This program area is further broken down into four research areas:
- o Environmental & Safety
- o Operations Technology
- o System Design & Materials
- o System Inspection & Monitoring

- **Clean Transportation:** The Clean Transportation program supports activities that reduce environmental impacts related to the transportation sector. Focusing on utilization of renewable natural gas (RNG) and renewable hydrogen, this program facilitates the development of zero-emissions technology for on-road and off-road applications, fueling infrastructure, and on-board storage technologies. This program area is further broken down into four research areas:
  - o Off-Road
  - o Onboard Storage
  - o On-Road
  - o Refueling Stations

- **Clean Generation:** This program targets the development and demonstration of high-efficiency products and technologies associated with the generation of power for the residential, commercial, and industrial market segments. Its goals are to reduce emissions, lower customer costs, integrate renewable fuels, and improve energy reliability and resiliency. This program area is further broken down into two research areas:
  - o Distributed Generation
  - o Integration & Controls

- **Customer End-Use Applications:** This program focuses on developing, demonstrating, and commercializing technologies that cost-effectively improve efficiency and reduce the environmental impacts of gas equipment used in residential, commercial, and industrial settings. This program area is further broken down into five research areas:
  - o Advanced Innovation
  - o Commercial Applications
  - o Commercial Food Service
  - o Industrial Process Heat
  - o Residential Appliances

SoCalGas RD&D is staffed with experts in science, engineering, industrial process technology, and environmental policy. In collaboration with researchers from some of the world's top institutions, it helps identify, test, and develop transformational products that promote decarbonization.

At present, SoCalGas RD&D engages with the regulatory, scientific, and regional community—including under-resourced groups—in a variety of ways, including:

- **Website:** The central repository for all publicly available material about SoCalGas RD&D, the website includes project spotlights, videos, links to previous annual reports, recordings of webinars, press releases, and more.[13]
- **Annual Reports:** These documents, available in English and Spanish, describe

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[13] https://www.socalgas.com/sustainability/research-development-demonstration-rdd

SoCalGas RD&D, summarize the projects and technologies it funds, and highlight many of its projects in informative case studies.[14]

- **Annual Stakeholder Workshop:** Each spring, SoCalGas RD&D hosts a public workshop to share information about its accomplishments of the previous year and to solicit input about its research plan for the coming year.
- **Quarterly Research Webinars:** In these webinars, representatives from projects supported by SoCalGas RD&D discuss their technologies, the research they conducted, and the results.[15]
- **Quarterly Newsletters:** These communications share information about SoCalGas RD&D, its projects, and its principles.
- **LinkedIn Page:** Here, SoCalGas RD&D provides information about the projects, technologies, and companies it supports as well as material about the activities of RD&D staff.[16]

SoCalGas RD&D plans to increase its engagement with under-resourced communities and to develop metrics to track how the projects it supports benefit those communities. This document represents a foundational component of that approach, one that SoCalGas RD&D can use for years to develop, maintain, and track its efforts to improve engagement with disadvantaged communities.

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[14] https://www.socalgas.com/sustainability/research-development-demonstration-rdd-reports
[15] https://www.socalgas.com/sustainability/research-development-demonstration-rdd/webinars
[16] https://www.linkedin.com/showcase/socalgas-research-development-&-demonstration-rd&d-

4 Methodology

The EER is meant to serve as an operating framework that integrates equity considerations throughout SoCalGas RD&D's work. It is based on an extensive literature review as well as consultation with numerous internal SoCalGas stakeholders and representatives of disadvantaged communities. It also includes key definitions and a set of action items to improve engagement with the community.

The goals of the EER are to improve outreach efforts to hard-to-reach, low-income communities disproportionately burdened by poor air quality within SoCalGas' service territory and to increase the likelihood that the benefits of clean energy technology impact all communities, with special consideration for historically under-resourced communities. To that end, the EER identifies actions that are both feasible and impactful.

For help in coordinating activities and completing the EER, SoCalGas RD&D engaged 2020vet, a veteran, woman-owned company with leaders highly experienced in strategy, advocacy, working with local communities facing conflict and crisis, building highly functional teams, training, and including both internal and external stakeholders at the table.[17] Working with 2020vet, RD&D staff:

- Conducted an extensive literature review
- Assessed SoCalGas' current community engagement capabilities through stakeholder interviews
- Identified numerous themes and narrowed them down to three key themes
- Brainstormed tasks that would support the three key themes
- Drafted the EER
- Shared the draft EER with internal and external stakeholders
- Incorporated stakeholder feedback and finalized the EER

4.1 The CPUC Environmental and Social Justice Action Plan

One of the key drivers behind the formation of the EER is CPUC's Environmental & Social Justice Action Plan. This document serves as a vision for how CPUC seeks to advance equity in its programs and policies for ESJ communities.

The Action Plan identifies existing inequities and proposes clear actions for how CPUC can use its regulatory authority to address safety, consumer protection, program benefits, and enforcement to encompass all the industries it regulates, including energy, water, and communications. The document utilizes the following broad guiding principles to inform its strategies to advance environmental and social justice:

- Consider impacts on ESJ communities when initiating discretionary proceedings.
- Use CPUC's planning, permitting, and regulatory role to advance social and environmental justice goals.
- Increase investment in clean energy resources to benefit ESJ communities, especially to improve local air quality, address negative health impacts, and prevent financial burdens.
- Strive to improve access to high-quality water, communications, and

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[17] https://2020vet.com/

transportation services for ESJ communities.

- Increase climate resiliency and financial benefits to ESJ communities.
- Enhance outreach and public participation opportunities for ESJ communities to meaningfully participate in CPUC's decision-making process.
- Enhance enforcement to ensure safety and consumer protection for ESJ communities.
- Promote economic and workforce development opportunities in ESJ communities.
- Promote access and education ensuring that ESJ communities will benefit from and participate in CPUC programs and proceedings.
- Improve training and staff development related to environmental and social justice issues within CPUC's jurisdiction.
- Monitor CPUC's environmental and social justice efforts to ensure that they are achieving their objectives.

When forming its own EER, SoCalGas RD&D followed many of the same principles.

4.2 Literature Review

The first step that SoCalGas RD&D took in the development of the EER was to conduct a literature review of 50+ source documents and reports from federal, state, and local agencies; industry and utilities; academia; and non-governmental organizations (NGOs). This review helped RD&D staff identify common themes and industry best practices, as well as possible structures for the EER.

During the literature review, RD&D staff:

- Conducted more than 100 hours of ESJ research
- Reviewed 50+ sources and thousands of pages of content
- Identified the source, title, and theme of each document; extracted best practices; and highlighted common observations
- Reviewed federal, state, and local government reviews, papers, and laws
- Reviewed private industry and utility companies
- Reviewed academic reports and NGO publications
- Conducted analysis to identify key themes, gaps, pain points, opportunities, and best practices
- Identified and consolidated key definitions

Four main concepts emerged from the literature review: 1) defining communities of interest, 2) community engagement, 3) metrics and evaluation, and 4) furthering the principles of ESJ.

4.3 Internal Stakeholder Interviews

ESJ activities are cross-cutting. To benefit from lessons learned, SoCalGas RD&D sought to coordinate its efforts with activities already underway within the company and to leverage existing company relationships with community members. Thus, RD&D staff conducted internal stakeholder interviews with representatives from a variety of SoCalGas departments, including:

- Regional Public Affairs

- Diversity, Equity, & Inclusion
- Supplier Diversity
- Community Giving
- Customer Assistance

The internal stakeholders raised many considerations, including the need to:

- Pursue clean energy workforce development through technical training and scholarships
- Include more diverse suppliers
- Support training and environmental education partnerships and programs
- Support the cross-cutting nature of ESJ in SoCalGas policy, planning, and budgeting
- Leverage current connections to reach under-resourced communities
- Build grassroots community capacity in decision-making efforts
- Ensure equitable distribution of benefits and access
- Highlight companywide efforts and successes to the public and CPUC

4.4 Identify Key Themes

Upon completion of the literature review and stakeholder interviews, SoCalGas RD&D held a series of internal meetings to review findings to date and narrow the team's focus. In this process, staff identified three broad themes for further thought:

	Theme	Description
Context	Obtain Situational Awareness	This provides the context necessary to engage under-resourced groups in a meaningful way.
Community	Increase Community Engagement	This builds the relationships that help gather accurate information about the interests, concerns, and needs of under-resourced groups and communities.
Culture	Institutionalize Diversity, Equity, & Inclusion	This builds a culture within SoCalGas RD&D that values DEI and includes equity engagement as a natural and obvious component of its work.

4.5 Define Environmental & Social Justice Communities

Upon completion of the literature review and stakeholder interviews, SoCalGas RD&D worked to define ESJ Communities for the purposes of the roadmap.

SoCalGas RD&D builds upon the CPUC's definition of ESJ Communities to include the following:

- Census tracts that score in the top 25% of CalEnviroScreen 4.0, along with those that score within the highest 5% of CalEnviroScreen 4.0's Pollution Burden but do not receive an overall CalEnviroScreen score over 75%[18]
- All tribal lands
- Low-income households (incomes below 80 percent of the area median income)
- Low-income census tracts (where aggregated household incomes are less than 80

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[18] https://oehha.ca.gov/calenviroscreen/report/calenviroscreen-40

percent of area or state median income)

Based on feedback received during the stakeholder engagement process, SoCalGas has expanded its definition of ESJ communities to include two federal programs, both of which maintain interactive maps to identify qualifying locations:

- **HUBZone Program:** This program fuels small business growth in historically underutilized business zones and is managed by the U.S. Small Business Administration.[19]
- **Opportunity Zones:** These are economically distressed communities, defined by individual census tract, nominated by America's governors, and certified by the U.S. Secretary of the Treasury. Opportunity Zones are managed by the U.S. Department of Housing and Urban Development.[20]

These communities, by virtue of their categorization as ESJ communities, typically have reduced access to environmental resources, experience more burdens, and are less able to participate in the environmental decision-making process.

4.6 Analysis and Brainstorming

Once SoCalGas RD&D had identified and agreed upon the three themes, staff began identifying associated actionable items that could be performed. After brainstorming a large number of potential tasks, RD&D staff narrowed down the list by evaluating each using the following criteria:
- Internal factors, such as resources required
- Time to implement
- Alignment with SoCalGas RD&D's capabilities
- Community empowerment
- Health and environmental impacts
- Public confidence

Ultimately, RD&D identified six core tasks to support the three themes.

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[19] https://www.sba.gov/federal-contracting/contracting-assistance-programs/hubzone-program
[20] https://opportunityzones.hud.gov/

Context	Community	Culture
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· **Task 2:** Regularly assess the effectiveness of Equity Engagement Roadmap activities	· **Task 4:** Provide funding and mentoring support to senior design projects	· **Task 6:** Review/revise RD&D project policies to include DEI components

4.7 Stakeholder Feedback

Once RD&D staff had developed the tasks, they completed a draft of the EER to share with both internal and external stakeholders. Internal stakeholders included those identified in Section 5.3. External stakeholders included:

- Anaheim Family YMCA
- Boys & Girls Club Anaheim and Cypress
- Boys Republic
- Community Action Partnership of Kern
- Delhi Center
- DIY Girls
- Endowment for Youth Committee
- FIND Food Bank
- Imperial Valley Economic Development Corporation (IVEDC)
- Mar Vista Family Center
- Tulare Kings Hispanic Chamber of Commerce
- United Boys & Girls Club of Santa Barbara County
- Wilmington YMCA
- Young Visionaries

RD&D then incorporated stakeholder feedback and finalized the draft.

5 The Six Core Tasks

As discussed previously, SoCalGas RD&D identified three key themes and six core tasks to support them, two for each theme.

5.1 Theme #1: Obtain Situational Awareness

At its most basic, situational awareness is the knowledge of what is happening in a given environment and its implications for the present and the future.[21] Without a clear understanding of where disadvantaged communities are and the challenges they face, the EER would lack relevance and serve merely as another "box checking" equity activity.

"You can't manage what you don't measure."

—Peter F. Drucker

5.1.1 Task 1: Monitor and Report Key Equity Engagement Metrics

Likewise, to maximize the effectiveness of its equity engagement, SoCalGas RD&D must understand its engagement baseline, regularly examine how it can improve its efforts, and determine metrics it can use to evaluate progress over time.

In this task, RD&D staff will develop, monitor, and report key equity engagement metrics. Examples of potential metrics include:

- Number of RD&D projects located in ESJ communities
- Total RD&D funding to projects in ESJ communities
- Number of Disadvantaged Business Enterprise (DBE) vendors funded
- Total RD&D funding to DBE vendors
- Percent of total RD&D funding to DBE vendors

RD&D staff will monitor these metrics throughout the year and report them in the SoCalGas RD&D Annual Report.

5.1.2 Task 2: Assess the Effectiveness of EER Activities

Using the equity engagement metrics defined above, RD&D staff will regularly assess the effectiveness of its EER activities. One of the ways to assess the effectiveness of engagement is to present results—such as the metrics defined in Task 1—at the SoCalGas RD&D annual workshop and then solicit feedback from stakeholders, which RD&D staff can use to modify the EER in the research plan submitted to CPUC for approval.

5.2 Theme #2: Increase Community Engagement

The core question related to this common theme is: "How can SoCalGas RD&D better connect with the communities it serves? As described below, RD&D staff identified

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[21] https://www.ckju.net/en/dossier/situational-awareness-what-it-and-why-it-matters-management-tool

two tasks associated with answering this question:

5.2.1 Task 3: Establish a Stipend Program

SoCalGas RD&D wants to encourage diverse researchers as well as advocates for ESJ communities to participate and provide input through the annual RD&D public workshop, advisory committees, or interviews. But RD&D staff recognize that this takes time and resources, a big ask for stakeholders with limited funding. We can provide small stipends to encourage participation by stakeholders that otherwise might not have the resources to make their voices heard.

5.2.2 Task 4: Provide Funding and Mentoring to Student Engineers

SoCalGas RD&D seeks to encourage and inspire the next generation of diverse researchers. In the past, RD&D staff have engaged with students at California State University, Los Angeles as part of their senior design program, providing project ideas and mentoring support. RD&D staff plan to continue and expand this work to engage with science and engineering students at Hispanic- and Minority-Serving Institutions throughout the SoCalGas service territory interested in applying their skills to address California's environmental challenges.

5.3 Theme #3: Institutionalize Diversity, Equity, & Inclusion

The challenges faced by historically under-resourced communities are longstanding. Any solution to these challenges must be built into the fabric of the organizations addressing the challenges. To that end, SoCalGas RD&D formulated two core tasks designed to institutionalize diversity, equity, and inclusion into its activities.

5.3.1 Task 5: Review and Revise RD&D Literature

Language matters. It shapes thought, establishes meaning, and impacts the way we think about and understand people, occurrences, and experiences.[22] The words we use can promote inclusion or enforce exclusion. Embrace difference or limit connection. And acknowledge issues or excuse problematic behavior.[23]

Therefore, it is essential that SoCalGas RD&D uses language that supports its equity engagement goals. To do this, RD&D staff have committed to reviewing all RD&D literature and, when necessary, revising it to include more inclusive ESJ language. Examples of relevant documents include the Annual Report, the Research Plan, webinar templates, and newsletters.

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[22] https://kojoinstitute.com/the-language-of-equity
[23] Ibid.

"Language matters. It shapes thought, establishes meaning, and impacts the way we think about and understand people, occurrences, and experiences."

—KOJO Institute

5.3.2   Task 6: Review and Revise RD&D Project Policies

One of the most significant ways that SoCalGas RD&D's equity engagement efforts can have a lasting and meaningful impact is the inclusion of people from under-resourced groups in the projects funded by SoCalGas RD&D. One of the best ways to do this is to enact policies that favor the inclusion of people from these groups in the project team as principal investigators, research scientists, graduate student researchers, interns, and contractors.

According to the U.S. Department of Energy:

> *"Diversity in STEM is important because diverse teams bring a variety of perspectives and experiences, which can often lead to more innovative solutions and increased success and competitiveness."*[24]

Likewise, The Harvard Business Review asserts that "diverse teams are more likely to constantly reexamine facts and remain objective," "process information more carefully," and be "more likely to develop new products."[25]

In addition, there is value in siting projects in under-resourced communities. SoCalGas RD&D plans to explicitly include equity considerations in its project evaluation criteria and to request that all potential research teams complete a DEI questionnaire. Outreach conducted during the site selection process could help project teams gain valuable support from the community, de-risk projects, and provide valuable insights into how a project or technology could impact historically disadvantaged and marginalized communities.
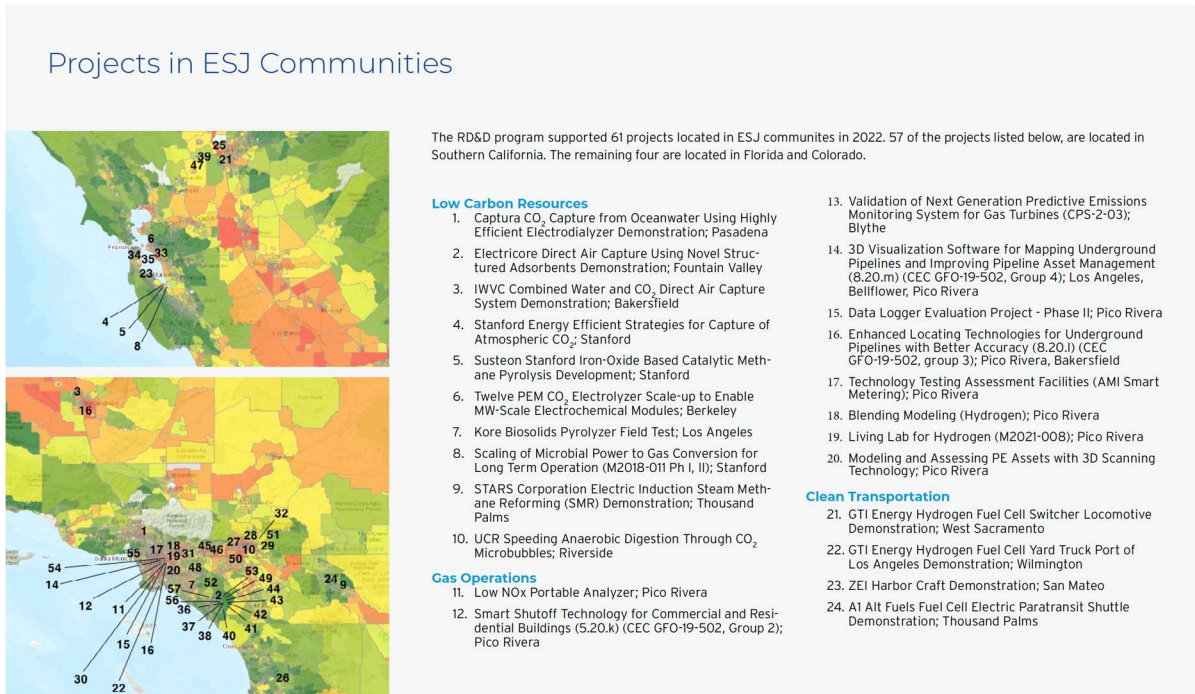
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[24] https://www.energy.gov/eere/diversity-stem-clean-energy-industries
[25] https://hbr.org/2016/11/why-diverse-teams-are-smarter
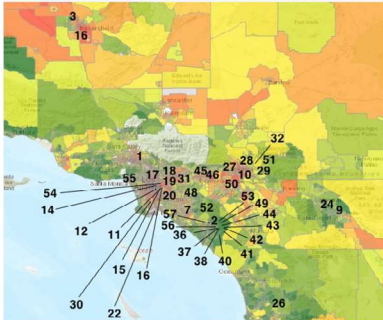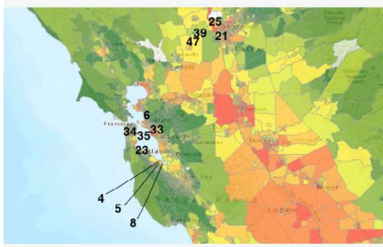
6 Actionable Steps Taken to Date

Although this roadmap helps formalize the steps needed to increase engagement across SoCalGas RD&D, it is important to note RD&D staff have already engaged in a number of equity engagement activities.

- RD&D staff began mapping its projects and identifying those located in ESJ communities. As reported in the 2021 RD&D Annual Report[26], RD&D supported 27 projects located in ESJ communities. In 2022, RD&D supported 57 projects located in ESJ communities in California.

Projects in ESJ Communities

The RD&D program supported 61 projects located in ESJ communites in 2022. 57 of the projects listed below, are located in Southern California. The remaining four are located in Florida and Colorado.

Low Carbon Resources

1. Captura CO_2 Capture from Oceanwater Using Highly Efficient Electrodialyzer Demonstration; Pasadena
2. Electricore Direct Air Capture Using Novel Structured Adsorbents Demonstration; Fountain Valley
3. IWVC Combined Water and CO_2 Direct Air Capture System Demonstration; Bakersfield
4. Stanford Energy Efficient Strategies for Capture of Atmospheric CO_2; Stanford
5. Susteon Stanford Iron-Oxide Based Catalytic Methane Pyrolysis Development; Stanford
6. Twelve PEM CO_2 Electrolyzer Scale-up to Enable MW-Scale Electrochemical Modules; Berkeley
7. Kore Biosolids Pyrolyzer Field Test; Los Angeles
8. Scaling of Microbial Power to Gas Conversion for Long Term Operation (M2018-011 Ph I, II); Stanford
9. STARS Corporation Electric Induction Steam Methane Reforming (SMR) Demonstration; Thousand Palms
10. UCR Speeding Anaerobic Digestion Through CO_2 Microbubbles; Riverside

Gas Operations

11. Low NOx Portable Analyzer; Pico Rivera
12. Smart Shutoff Technology for Commercial and Residential Buildings (5.20.k) (CEC GFO-19-502, Group 2); Pico Rivera

13. Validation of Next Generation Predictive Emissions Monitoring System for Gas Turbines (CPS-2-03); Blythe
14. 3D Visualization Software for Mapping Underground Pipelines and Improving Pipeline Asset Management (8.20.m) (CEC GFO-19-502, Group 4); Los Angeles, Bellflower, Pico Rivera
15. Data Logger Evaluation Project - Phase II; Pico Rivera
16. Enhanced Locating Technologies for Underground Pipelines with Better Accuracy (8.20.l) (CEC GFO-19-502, group 3); Pico Rivera, Bakersfield
17. Technology Testing Assessment Facilities (AMI Smart Metering); Pico Rivera
18. Blending Modeling (Hydrogen); Pico Rivera
19. Living Lab for Hydrogen (M2021-008); Pico Rivera
20. Modeling and Assessing PE Assets with 3D Scanning Technology; Pico Rivera

Clean Transportation

21. GTI Energy Hydrogen Fuel Cell Switcher Locomotive Demonstration; West Sacramento
22. GTI Energy Hydrogen Fuel Cell Yard Truck Port of Los Angeles Demonstration; Wilmington
23. ZEI Harbor Craft Demonstration; San Mateo
24. A1 Alt Fuels Fuel Cell Electric Paratransit Shuttle Demonstration; Thousand Palms

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[26]
https://www.socalgas.com/sites/default/files/2021%20SoCalGas%20RD%26D%20Annual%20Report.pdf

25. Cummins Integrated Fuel Cell Electric Powertrain Demonstration; West Sacramento
26. GTI Energy Symbio Class 8 Long-Haul Hydrogen Fuel Cell Truck Demonstration; Poway
27. SCAQMD Heavy Duty Truck Engine In-Use Emission Study; Riverside
28. SCAQMD Hydrogen Blended Natural Gas in NZE Engine Emissions Study; Riverside
29. UC Riverside Hydrogen Blended Natural Gas Engine Durability Test; Riverside

Clean Generation

30. EPRI ORC Waste Heat Recovery Demonstration; Compton
31. GTI Energy Marathon/EC Power mCHP Testing and Demonstration; City of Industry
32. Mainspring Energy Ultra-Low NOx Linear Power Generator Demonstration; Colton
33. Noble Thermodynamic Systems Ultra-Efficient CHP using a Novel Argon Power Cycle Development; Alameda
34. QSI Nano-Power Generation System Proof-of-Concept; San Francisco
35. Scaled Power 40kw Turbogenerator Low Emissions Burner Development and Testing; San Francisco
36. UCI Effect of Hydrogen Addition into Natural Gas on SCR of NOx Lab Testing; Irvine
37. UCI Fuel Flexible Rotary Engine MicroCHP Development; Irvine
38. UCI Low-Cost Sensors for Smart Burners Research; Irvine
39. Blue Frontier Fuel Cell Integrated Air Conditioning System Dynamic Lab Testing; Davis
40. UCI Fuel Cell Supported Nanogrid Controls Evaluation; Irvine

41. UCI Fuel Cells in Data Research; Irvine
42. UCI Hydrogen Enabled Microgrids for Critical Infrastructure Research; Irvine
43. UCI Hydrogen Energy Storage and Integration with Dispatchable Power Generator System Design; Irvine
44. UCI Integrated SOFC, Solar, and Storage System in ZNE Residential Nanogrid Design; Irvine

Customer End-Use Applications

45. METRON Energy Virtual Assistant (EVA) Industrial AI Demonstration; El Monte
46. GTI ENERGY Model-Based Control Hospital Decarbonization Demonstration, Baldwin Park
47. UC Davis Aerosol Sealant Demonstration; Davis
48. GTI ENERGY SCAQMD HE/Low-NOx EcoZone Burner Kroger Demonstration; La Habra
49. UCI Hydrogen Blend Commercial Stove Low NOx Catalytic Burner Development; Irvine
50. GTI ENERGY Burner Exchange to Support Radiative Recuperator Demonstration; Ontario
51. GTI ENERGY Ceramic Radiant Tube Inserts for Waste Heat Recovery Demonstration; San Bernardino
52. GTI ENERGY Waste Heat Effective Transfer in Brewery & Distillery Demonstration; Santa Ana
53. UCI Solid Oxide Electrolysis Cells for Green Steel Production Demonstration; Irvine
54. EAC H2 Home Appliance Set Validation Test Research; Pico Rivera
55. GTI Energy Strategic Pathways and Analytics for Tactical Decommissioning of Natural Gas Infrastructure Research; Santa Monica
56. UCI Catalytic Burner Retrofitted Water Heater Lab Demonstration; Irvine
57. UCI Low NOx Water Heater Retrofit for Hydrogen Blends Development; Irvine

- In five different workshops, RD&D staff met with 33 groups, including community-based organizations and diverse academic populations, to better understand the needs of under-resourced communities. These groups include:
  - Home Aid Orange County
  - Proteus Inc.
  - Pomona Chamber of Commerce
  - Unity Shoppe Santa Barbara
  - Santa Barbara Zoo
  - Southeast Community Development Corporation
  - Family Assistance Ministries
  - El Concilio Family Services
  - Family Service Association
  - CSET Community Services Employment Training
  - Orange County Asian and Pacific Islander Community Alliance, Inc.
  - Community Action Partnership of Kern
  - Asian Youth Center
  - Endowment for Youth Committee
  - Greater Lakewood Chamber of Commerce
  - University of California Riverside's Center for Renewable Natural Gas
  - Cal Poly Pomona
  - California State University (CSU) Long Beach
  - CSU Fullerton
  - University of California-Irvine
  - Cal State Los Angeles
  - Cypress College
  - Pasadena City College
  - Santa Barbara City College

- o Kern Community College District
- o East Los Angeles College, Department of Engineering & Technologies
- o Bakersfield College
- o Cerritos Community College
- o Saddleback College
- o University of Southern California
- o California Greenworks
- o Delhi Center
- o Municipal Water District of Orange County
- Socialized the draft EER with internal and external stakeholders to gain feedback.
- Worked with the SoCalGas Regional Public Affairs team to identify and connect with contacts in disadvantaged and low-income communities to seek input and needs.
- Connected with regional California universities to identify researchers engaged with members of disadvantaged and low-income communities.
- Leveraged existing connections with Air Districts, CARB, and CEC to identify promising contacts in disadvantaged and low-income communities.

Appendix A – Literature Review

Source	Title	Themes	Best Practices
California Public Utilities Commission (CPUC)			
CPUC	2019 Annual Affordability Report	The report uses **metrics to quantify the affordability of utility services** at a geographically granular level so that it is possible to ID where utility affordability concerns are most serious in California.	**Mapping: Geographically-focused approach** to understanding and addressing utility affordability, which **enables more cost-effective and targeted delivery of relief.** Evaluate the extent to which assistance programs such as CARE and FERA are effectively deployed to customers in these communities to address affordability concerns.
CPUC	Environmental & Social Justice Action Plan V. 2	The (ESJ) Action Plan serves as both a commitment to furthering principles of environmental and social justice as well as an operating framework with which to integrate ESJ considerations throughout the agency's work.	Identified nine overarching goals, subset objectives, and 95 action items to nest within. **Defines targeted communities and critical items for consideration** that are relevant (COVID, wildfires, outreach, workforce development, etc.).
CPUC	Program Options to Promote Clean Energy and Reduce Air Pollution in AB 617 ESJ Communities	Developed a **typology of air pollution source sectors** affecting the initial 10 communities selected pursuant to Assembly Bill 617 for air monitoring and community emissions reduction programs through the CA Air Resources Board's Community Air Protection Program. Additional analysis needed; thus, the ESJ Action Plan development.	**Mapping:** Pollution areas defined. Key emission types defined. Community characteristics and pollution source types by community.
CPUC	Disadvantaged Communities Advisory Group Press Release	Advisory group consisting of **representatives from disadvantaged communities** who will provide advice on state programs proposed to achieve clean energy and pollution reduction.	Fulfills a requirement in Senate Bill (SB) 350. As defined, disadvantaged communities are the census tracts in California that are **disproportionately burdened by multiple sources of pollution.** Relative burden is determined by review of data on 20 pollution, health, and socio-economic

		factors.	
**Energy Companies**			
PG&E	Environmental Justice Policy	To: 1) **Comply** fully with the letter and spirit of all applicable environmental justice laws and regulations. 2) **Minimize impacts to low-income communities** and communities of color in PG&E's operations by incorporating environmental justice considerations into the management, purchase, sale, and development of existing and planned facilities and delivery of energy to customers. 3) Consider environmental justice impacts in **policy engagement,** including climate change policies, to minimize adverse effects on low-income communities and communities of color and to support the development of sustainable communities. 4) **Educate employees** about Environmental Justice Policy and the responsibility to work collaboratively with neighbors and surrounding communities. 5) Maintain **open communication and seek opportunities to partner with stakeholders** on environmental justice concerns.4) Educate employees about Environmental Justice Policy and the responsibility to work collaboratively with neighbors and surrounding communities. 5) Maintain open communication and seek opportunities to partner with stakeholders on environmental justice concerns.	**A 1-page policy.** For PG&E, Environmental Justice means making better business decisions by understanding and considering the potential impacts of activities and investments on low-income communities and communities of color, and by understanding community needs.
PG&E	Employee Resource Groups	PG&E **identified employees by demographics** to include access/disability network, Asian, Black, Latino, Legacy group-sharing experience, and Middle East, Europe, North African (MEENA), Nonenergy (onboarding), Pride, Samahan (Filipino), Veterans and Women. They also have	**Using internal employee network to perform community outreach efforts.**

		Engineering Groups focused on teaching STEM to women and diversity groups.	
PG&E	Docketed 16-OIR-06 Climate Vulnerability Assessment (CVA) to CA Energy Commission	**PG&E's CVA Community Engagement Proposal (CEP)** is intended as a framework for how PG&E and climate-vulnerable community stakeholders may work together to build mutual trust and engage in authentic and meaningful exchange regarding the expected climate resilience of the energy system and building community resilience through the energy system.	The CVA CEP is an opportunity for PG&E to **practice engagement that moves beyond informing and consulting the community to involving and collaborating with the community.** The CEP is explicitly framed as a proposal to invite collaboration with stakeholders that represent disadvantaged and vulnerable communities at the outset of the process.
SCE	SCE Building Electrification Proceeding	**Proposing to create healthier, clean energy homes and businesses** by reducing the use of carbon-emitting fossil fuels in buildings.	If approved by the California Public Utilities Commission, the overall plan would provide **$677.2 million for programs** to help accelerate the growth of the building electrification market over **four years.** It prioritizes **income-qualified customers** and **environmental and social justice communities**.
California Agencies			
CalEPA	DESIGNATION OF DISADVANTAGED COMMUNITIES PURSUANT TO SENATE BILL 535 (DE LEÓN)	CalEPA is **responsible for identifying disadvantaged communities for purposes of the Cap-and-Trade** funding program. Describes how they arrived at their decision to identify communities of interest. Although CalEnviroScreen provides a reasoned, scientific base from which to work, identifying disadvantaged communities remains a challenging task.	**Mapping:** Identified areas based on legislative actions: 1) SB 535 Disadvantaged Communities and census tracts and 2) AB 1550 Low-Income Communities. Identified both graphically and overlayed.
California Energy Commission	Energy Equity Indicators	Recommendations include solar offerings, labor and workforce development strategy, common metrics, expand funding, outreach and technical assistance, collaboration with community-based orgs, fund R&D, and **study**	Tracks progress through **mapping.** Barriers study reviewed clean energy performance in low-income and disadvantaged communities and **points to key data gaps. Identifies**

		to increase small business contracting located in COIs.	energy equity objectives: Customers served in communities of interest, **Small Business contracts, clean energy jobs, investment amount, and energy savings.**
The White House	Justice40	Justice40 is a whole-of-government effort to ensure that federal agencies work with states and local communities to make good on President Biden's promise to **deliver at least 40 percent of the overall benefits from federal investments in climate and clean energy to disadvantaged communities.**	The pilot **identifies 21 priority programs** to immediately begin enhancing benefits for disadvantaged communities. These priority programs will provide a blueprint for other agencies to help inform their work to implement the Justice40 Initiative across the government.
White House Environmental Justice Advisory Council	Justice40 Climate and Economic Justice Screening Tool & Executive Order 12898 Revisions	State-by-state climate and clean energy summaries.	Initiative recommendations for the whole of government to focus on include: **clean energy and efficiency;** clean transit; safe, affordable, and sustainable housing and communities; **training and workforce development;** remediation; clean water infrastructure; climate mitigation and resiliency; and **community and university partnerships.**
Environmental Protection Agency	EJSCREEN: Environmental Justice Screening and Mapping Tool	EJSCREEN allows users to **access high-resolution environmental and demographic information** for locations in the United States and compare their selected locations to the rest of the state, EPA region, or nation.	**Mapping.** EPA has developed a **new environmental justice (EJ) mapping and screening tool called EJSCREEN.** It is based on nationally consistent data and an approach that combines environmental and demographic indicators in maps and reports.
Environmental Protection Agency	College / Under-served Community Partnership Program	Provides a creative approach to partnering and delivering technical assistance to underserved communities. **The program enlists colleges and universities to assist these communities** through student internships, practicums, and capstone	Communities receive vital assistance and services on a voluntary basis at no cost. Objectives are to build capacity and provide technical support to under-resourced communities based on **community-**

		projects.	**identified needs** and to provide practical, problem-solving experiences for college and university students. Technical assistance addresses environmental, economic, and social issues enabling communities to advance toward sustainability and a better quality of life. Academic institutions and students receive valuable capacity-building and community engagement opportunities
Federal Agencies			
Environmental Protection Agency	Environmental Justice Research Roadmap	Office of R&D (ORD) research directs attention to the myriad issues raised by environmental justice and **captured through discussions with advisory groups.**	The EJ Roadmap is presented as a summary inventory of ORD's research efforts, categorized by four overlapping EJ science challenges: 1) **developing decision-support tools** for identifying and prioritizing concerns, assessing cumulative impacts, and evaluating mitigation options; 2) improving our understanding of environmental health disparities and developing methods and data for assessing cumulative risks; 3) supporting Tribal sustainability and well-being; and 4) characterizing climate justice.
DOT: Federal Highway Administration	Environmental Justice Resources	EJ at the Federal Highway Administration (FHWA) means **identifying and addressing disproportionately high and adverse effects of the agency's programs, policies, and activities on minority and low-income populations.**	Guiding Principles: 1) To ensure **full and fair participation** by all potentially affected communities in the transportation decision-making process. 2) To avoid, minimize, or **mitigate disproportionately high and adverse human health and environmental effects,** including social and economic effects, on

			minority or low-income populations. 3) To **prevent the denial** of, reduction in, or significant delay in the receipt **of benefits** by minority or low-income populations.
DOT: Federal Highway Administration	Federal Highway Administration Environmental Justice Reference Guide	EJ at FHWA means identifying and addressing disproportionately high and adverse effects of the agency's **programs, policies, and activities** on minority populations and low-income populations to **achieve an equitable distribution of benefits** and burdens. This also includes the full and fair participation by all potentially affected **communities in the transportation decision-making process.**	The USDOT EJ Strategy identifies three fundamental principles of EJ that guide USDOT actions: Same as above.
Civil Society & Private Sector			
Justice40 Accelerator	The Solutions Project	The Justice40 Accelerator will **serve frontline communities applying for federal funds** across multiple agencies, flowing from the administration's executive order. 170 grantees across 35 states. $15.5M invested-major donors.	The Justice40 Accelerator's offerings include **informational briefings and resources to learn about federal grants and eligibility,** philanthropic capacity-building grants for dozens of eligible organizations, p**roject pre-development workshops,** partnership opportunities, and t**echnical expertise** to support successful applications for federal funding, including accounting, legal, and government grant writing.
Environmental Law Institute	Ground Truth: Operationalizing Environmental Justice: PEOPLE PLACES PLANET PODCAST · EPISODE 19 · SEASON 3	To clarify Justice40. Advocates that we must make sure that **EJ communities have real opportunities to engage** and maximize the odds that the most vulnerable can frame out a new, more inclusive direction.	Environmental justice has gained new momentum in recent years, amplified by a global focus on social justice, climate, and equity. Shortly after taking office, President Biden released Executive Order 14008, *Tackling the Climate Crises at Home and Abroad*. The EO includes a new initiative, Justice40, which states

			that 40% of the overall benefits from specific federal investments—**including energy efficiency, clean energy, clean water infrastructure, and training and workforce development—will be directed toward disadvantaged communities.**
The Center of Environmental Excellence	Practitioners Peer Exchange Environmental Justice Roadmap	**Peer exchange** of over 350 people. Created a roadmap identifying key issues, current state of practice, considerations, and benefits to practitioners for eight focus areas.	ESJ webinars, case study development, **increase technical assistance and coordination.** Strategies include **developing guidance on the consistency of data and information exchange;** researching how agencies are determining disproportionate impacts; and **developing guidance to reflect best practices and develop analytical tools to standardize evaluation of disproportionate impacts on environmental justice communities while allowing flexibility for project-specific information,** adapting methods to change demographic data, and exploring new methods of obtaining data.
NY City Environmental Justice Alliance	A Critical Decade for Climate, Equity, & Health	Nonprofit. Watchdog agency that works grassroots but is also at the "table." Discusses the climate justice movement gaining momentum at the local, state, and national level. Frontline communities are leading by example, confronting the global crisis at the **neighborhood level with projects that increase community resiliency** such as cooperative solar projects, local green industrial waterfront plans, coastal protection priorities, and food cooperatives.	Focus on three things: 1) reduce harmful GHG and localized emissions, 2) advance a Just Transition towards an inclusive, regenerative economy, and 3) **cultivate healthy and resilient communities. They use many maps in the reports**. They address COVID and infections as a climate problem linked to heat and rising temperatures. **Excellent Visions for the Climate and Community**

			Development Fund: 1) **provide career track jobs in the EE sector,** 2) improve public health by **reducing localized emissions** and improving indoor air quality; 3) **improve resilience of low-income tenants** to extreme temperatures, 4) **reduce energy burden** amidst rising utility costs, 5) **improve neighborhood economic activity, and** 6) **increase civic participation and leadership** in community development.
Universities			
UCLA	Making Justice40 a Reality for Frontline Communities; Lessons from State Approaches to Climate and Clean Energy Investments.	Identifies Opportunity Pathways: justice-driven frontline communities; community powered. Achieve transformational change and accountable change. **Institutionalize justice.**	Defined **five types of disparities**: pollution exposure, communities at high risk of climate change impacts, communities of color and low-income, working-class households impacted by the fossil fuel transition to a clean economy and low-income households that historically have benefited the least from clean tech and other environmental investments.
UC Berkeley, USC & Occidental College	Advancing Equity in California Climate Policy: A New Social Contract for Low-Carbon Transition	This report presents a Climate Policy Equity Framework to **assist California decision-makers interested in reducing greenhouse gas emissions in ways that promote economic, social, and environmental equity.** Suggests that policymakers, regulators, community groups, advocacy organizations, and business interests should develop a **"social contract"** to manage a transition to a low-carbon economy that both maximizes the benefits of low-carbon economic development and minimizes the risks to working people and disadvantaged	Climate equity defined. How can it be defined in a way that promotes both good jobs and prioritizes those communities that are hardest hit by climate change, multiple environmental hazards, and socioeconomic stressors? What **key criteria can then be used to develop and assess policies** such as renewable portfolio standards, incentives for energy retrofits, cap and trade, transit-oriented development, low carbon fuels and

		communities.	vehicle deployment, and much more?
		Legislation	
AB 1532	Chapter 807: California Global Warming Solutions Act of 2006	Amend and add chapters relating to GHG emissions. Requires specific purposes and coming up with a 3-year plan on what that is.	Designates CARB charged with monitoring and regulating sources of emissions and GHGs. **Mapping: clean energy jobs, SB opportunities.**
AB 350	Clean Energy and Pollution Reduction Act of 2015	50% renewable energy by 2030, doubling energy efficiency savings by 2030, encourages widespread transportation electrification, integrated resource planning to reduce GHG emissions, and addressing barriers to low-income residents and disadvantaged communities.	Requires that **electricity sold to retail customers from eligible renewable sources be increased by 50% by Dec 31, 2030**.
SB 535	California Global Warming Solutions Act of 2006	Requires that a minimum of 25 percent of the available proceeds be allocated to projects that provide a benefit to disadvantaged communities; and at least 10 percent of the available proceeds were to be allocated to projects located within disadvantaged communities. Also required **identification of disadvantaged communities.**	An act to add Sections 39711, 39713, 39715, 39721, and 39723 to the Health and Safety Code, relating to climate change. The bill would require the Department of Finance, when developing a specified 3-year investment plan, to **allocate 25% of the available monies in the GHG Reduction Fund to projects that provide benefits to disadvantaged communities.**
SB 1018	Amendments by Committee on Budget and Fiscal Review	Amends several bills.	Established the Office of Education and Environment under CalEPA to **implement statewide environmental education programs and implement a unified education strategy on the environment for elementary and secondary schools in the state.** Bill established the office in the Department of Resources and Recovery instead.
AB 1550	Greenhouses Gases: Investment	**Increasing the percent of funds for projects located in disadvantaged communities**	Designates CARB charged with monitoring and regulating sources of

	Plan: Disadvantaged Communities	**from 10 to 25 percent.**	emissions and GHGs.
SB 43	Chapter 413 Electricity: Green Tariff Shared Renewables Program	Created the Green Tariff Shared Renewables Program to **allow consumers to purchase voluntarily electricity from renewable energy facilities** through major utility companies.	Requires participating utilities to file an application requesting approval of a **green tariff to implement a program enabling ratepayers to participate directly in offsite electrical generation facilities.**
HSC DIV 26	Health and Safety Code, DIV 26 Air Resources Part 2 State Air Resources Board	Communities identified by geographic, socioeconomic, public health, and environmental hazard criteria.	**Required CalEPA to identify disadvantaged communities for investment.**
AB 32	California Global Warming Solutions Act of 2006	Requires a sharp decrease in GHG emissions.	Required CA to reduce its GHG emissions to 1990 levels by 2020. **First program in the country to use a comprehensive, long-term approach to address climate change.**
SB 862	Committee on Budget and Fiscal Review: GHG: Emission Reduction	Amends many sections of various bills.	Established the Cal Recycle Greenhouse Gas Reduction Revolving Loan Program, which would authorize the Department of Resources Recycling and Recovery to **provide loans and grants to reduce greenhouse gas emissions** by promoting in-state development of infrastructure to process **organics and other recyclable materials into new value-added products.** The Department of Community Services and Development to develop and **administer the Energy Efficiency Low-Income Weatherization Program** and to expend moneys appropriated by the Legislature from the Greenhouse Gas Reduction Fund

			for the purposes of the program.

Appendix B – RD&D Annual Workshop Community Based Organization (CBO) Stipend Program

1. Background

In Resolution G-3573 approving the SoCalGas RD&D 2021 Research Plan[27], the CPUC stated that: "in developing future Research Plans, SoCalGas should consider offering small grants, participation stipends, or technical assistance to disadvantaged community stakeholders to encourage meaningful participation in the research development process."[28] This guidance was incorporated into the SoCalGas RD&D Equity Engagement Roadmap (EER). Specifically, the roadmap describes "Task 3: Establish a stipend program to encourage CBOs and other stakeholders to participate in the RD&D Public Workshop Under the theme Increase Community Engagement."[29] The EER was presented to internal and external stakeholders as part of the development process. Feedback from these stakeholders was incorporated into the final EER as described in section 4.7 of the EER.

2. CBO Stipend Notification and Identification Process

RD&D will provide information about the stipend program as part of the invitation process used to notify the public about the Annual RD&D Public Workshop. This process includes notification of the appropriate CPUC service lists. RD&D is tracking CBOs that participate in SoCalGas' Climate Advisory Group as part of Rulemaking 18-04-019 ("Adaptation OIR"). Furthermore, RD&D will adopt the appropriate best practices[30] described in the Community Engagement Plan (CEP) filed by SoCalGas and the other California IOUs as part of that rulemaking. Those CEPs are expected in 2024. RD&D also works with the SoCalGas Regional Public Affairs (RPA) team to leverage RPA's established relationships with CBOs throughout SoCalGas' service territory. RD&D also relies on feedback from participating CBOs and the broader set of RD&D stakeholders regarding identifying CBOs for the stipend program

3. CBO Stipend Eligibility

To apply for the RD&D Annual Workshop Stipend, an applicant must be one of the following types of entities:
- TYPE 1: California tax-exempt organizations under Section 501(c)(3) of the Internal Revenue Code.
- TYPE 2: Federally or non-federally recognized California Native American Tribes, as defined in Public Resources Code (PRC) Section 21073. PRC

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[27] Resolution G-3573, March 18, 2021, page 9.
[28] The Commission is similarly exploring a CBO stipend program in the ESJ Action Plan which includes ESJ Action Item #1.2.2 "Consider Funded Community Based Organization (CBO) Program," page 30. (Available at: esj-action-plan-v2jw.pdf (ca.gov)).
[29] Research, Development and Demonstration Equity Engagement Roadmap, April 10, 2023, page 3.
[30] D.20-08-046 at Ordering Paragraph 5.

Section 21073 defines a California Native American Tribe as a Native American Tribe located in California that is on the contact list maintained by the Native American Heritage Commission for the purposes of Chapter 905 of the Statutes of 2004.
- TYPE 3: Tribal entities, including organizations incorporated under Tribal law and wholly owned by the Tribe, Tribal Section 17 Corporations, and Tribal utilities and authorities operated under Tribal law.

4. CBO Stipend Application Evaluation Criteria

Applications are evaluated based on several criteria and RD&D may request additional information to allow for proper evaluation including:
- Geographical Distribution – equitable representation across the large geography and diverse communities served by SoCalGas
- Functional Specialty – insight into ratepayers' energy, air quality, or decarbonization needs

5. CBO Stipend Requirements

After a CBO's application is approved, the CBO must complete all the following requirements relating to the Annual Public Workshop to obtain the stipend:
- Attend the RD&D Annual Public Workshop
- Provide written feedback on the Research Plan presented at the Annual Public Workshop
- Submit an invoice and any additional documentation required to process payment

6. CBO Stipend Amount

A standard stipend of $1,000 will be issued for a participating CBO that fulfills the requirements. This amount is based on the estimated time to participate in the RD&D Annual Public Workshop (five hours for attending the workshop itself and three hours to prepare for and submit written comments relating to workshop) at a standard compensation rate of $150.00 per hour.[31]
Stipends are issued as non-PO payments under the standard $10,000 limit and are recorded to the RD&D Program Administration budget under category 6: Stakeholder Communication, Engagement, and Outreach consistent with the administrative budget procedure developed for the CEC EPIC Program.[32]

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[31] *See* CPUC Equity and Access (E&A) Grant Program, Grant Guidelines Rev. August 4, 2023, Eligible Activity Compensation, at 10. (Available at: ea-grant-guidelines_071023.pdf (ca.gov)).
[32] Joint EPIC Administrator Advice Letter on Administrative Cost, Docket Number: 20-EPIC-01, TN# 241275, Docketed 1/25/2022.