ORANGE COUNTY
POWER AUTHORITY
YOUR CLEAN ENERGY CHOICE

COMMUNITY POWER PLAN

February 2026

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ACKNOWLEDGEMENTS

The Community Power Plan was developed by The Energy Coalition (TEC) in partnership with Orange County Power Authority (OCPA). All recommendations presented herein were provided by TEC. The project was led by Julie Castro and Code Bruder, with special thanks to the following individuals for their valuable contributions: Pranesh Venugopal, Nataly Morales Sandoval, Jacquie Henderson, Bex Hausheer, Laurel Rothschild, Felicia Federico, Meaghan Laverty, Taylor Rosetti, Vanida Tran, Mallory Schaefer, Christina Vanciu, Udval Tsolmonkhuu, Maxime Le Mevel, and Alina Bonto.

OCPA and TEC gratefully acknowledge the numerous organizations and individuals whose hard work and expertise brought the Community Power Plan to life. Special recognition is extended to the following:

Suzanna Choi, Asian Business Association of Orange County (ABAOC)

Patty Oh, Cool OC

Eunice Chow, Asian American Senior Citizens Service Center (AASCSC)

Kristy Chen, Orange County Registrar of Voters

The Cost Benefit Analysis Scoring Committee: Alice Havenar-Daughton (Marin Clean Energy), Genaro Bugarin (The Energy Coalition), Josh Chanin (San Jose Clean Energy), JP Ross (Ava Community Energy), Peter Mustacich (Silicon Valley Clean Energy), Sona Coffee (Clean Power Alliance)

OCPA further acknowledges the continued engagement of community members in listening sessions, community workshops, and the community needs survey. The Community Power Plan would not have been possible without the essential insights and contributions of our community.

Thank you! 謝謝你！ 谢谢你！ 감사합니다!

Cảm ơn! ¡Gracias! متشكرم!

شكراً لك! Salamat! ありがとう！

II. EXECUTIVE SUMMARY

PURPOSE AND SCOPE OF THE PLAN

This **Community Power Plan (CPP)** is a guide to help the Orange County Power Authority (OCPA) to create and run programs to deliver local, clean, and equitable energy. The plan identifies program opportunities that will be impactful and achievable, and offers a clear process for prioritizing and implementing them in phases.

The CPP is a flexible roadmap that can grow and evolve over time. It ensures that OCPA's investments will align with what the community needs, help OCPA meet its goals, and keep the agency on track to lead Orange County's clean energy transition.

STRATEGIC VISION: LOCAL, SUSTAINABLE, AND EQUITABLE ENERGY

OCPA's strategic vision is, "...to think globally and **act locally** by empowering our communities with choice in energy needs. We are committed to transforming the energy landscape, driving a **sustainable** future and beyond by empowering and enabling our communities, and ensuring that **no community is left behind** in this transition to renewable energy." This vision guides all aspects of the CPP and defines how OCPA serves its member communities. **Local** reflects OCPA's commitment to supporting workforce development, economic resilience, and community reinvestment. **Sustainable** represents OCPA's focus on expanding renewable energy access and accelerating electrification across buildings, transportation, and industry to meet California's climate goals. **No community left behind** underscores the agency's dedication to ensuring that all customers (particularly renters, small businesses, and historically underserved communities) have meaningful access to the benefits of clean energy.

By focusing on these principles, OCPA aims to provide renewable energy at competitive rates and equitably invest in programs that support a more sustainable, inclusive, and resilient Orange County.

SUMMARY OF THE PROCESS AND KEY FINDINGS

The CPP was developed through a collaborative, multi-phased, and data-informed process that integrated community feedback, organizational insight, and market analysis.

The process began with a **Community Needs Assessment** conducted between **January and September 2025**, which gathered extensive community input through **1,244 survey responses, 25 tabling events,** and **seven listening sessions** and reached over **54,000 residents** through newsletters and outreach. The assessment identified key community priorities, barriers to program participation, and equity considerations. Feedback revealed that affordability, convenience, and landlord-related challenges were major factors limiting participation in past clean energy programs, underscoring the importance of renter-focused and flexible offerings.

OCPA then conducted an **Operational Alignment Assessment** in **June and July 2025**, surveying OCPA staff and leadership to determine which program structures would best support the agency's operational goals. The assessment found that programs focused on **load shifting**, **community impact**, and **rate reduction** were top priorities. Staff also emphasized that **customer satisfaction** and **community education** are essential to long-term success, with outreach and education identified as one of the most beneficial potential program types.

Next, OCPA developed an **Existing Programs Assessment** during **July and August 2025**. OCPA studied existing programs across the state and region to find service gaps and make sure new programs complement currently available programs. The analysis found opportunities for OCPA to invest in **demand response**, **renter-focused programs, electrification efforts**, and **industrial and cross-cutting efficiency measures**. These findings helped OCPA define where new programs could add unique value beyond current offerings from SCE, SoCalREN, and other entities.

A Funding Opportunities Assessment, completed between **July and November 2025**, evaluated available state and federal funding streams to support new programs and reduce reliance on ratepayer funds. Key findings highlighted the **California Public Utilities Commission's (CPUC) Apply to Administer (ATA) process** as a high-impact funding pathway for CCAs, alongside opportunities in **clean mobility** and **energy efficiency pilot projects**. The assessment also emphasized the value of **collaboration with member cities** (Buena Park, Fullerton, Irvine, and Fountain Valley) to strengthen funding applications and share administrative capacity.

Finally, OCPA conducted a **Cost-Benefit Analysis** from **March through October 2025**, integrating data from all prior assessments. OCPA developed a customized CBA scoring tool, established weighting criteria for impact and feasibility, and convened a six-member scoring committee to evaluate proposed programs. The results were used to prioritize programs by both community benefit and operational viability, providing the foundation for the CPP's final recommended program portfolio.

This structured and comprehensive approach ensured that the CPP's final recommendations are both responsive to community needs and aligned with OCPA's operational, financial, and strategic priorities.

SUMMARY OF IDENTIFIED PROGRAMS RECOMMENDATIONS

Through the assessment process, eleven potential program initiatives were identified and evaluated according to their anticipated impact and feasibility. Two initiatives emerged as **high-priority candidates**: a direct-to-renter electrification and demand response (DR) program initiative and a comprehensive energy efficiency and electrification program initiative. These offerings could begin operations within five months of adoption of the CPP. These program concepts demonstrated the strongest alignment with OCPA's strategic goals and were identified as the most feasible to get up-and-running quickly.

Refrigeration efficiency and electrification was identified as a **medium-priority initiative**, suitable for deployment within 18 months while program infrastructure and partnerships are developed. The remaining initiatives were categorized as **low priority** or **not recommended** due to either limited feasibility or overlap with existing offerings.

Table 1. Program Initiatives

Program	Intervention Summary	Priority Level
Direct-to-renter electrification and demand response (DR) program	Provides renters and small businesses with portable electrification and DR solutions to overcome landlord barriers and reduce energy costs.	High
Comprehensive energy efficiency and electrification program	Integrates efficiency and electrification upgrades with audits, incentives, and financing to lower emissions and bills across sectors.	High
Refrigeration efficiency and electrification program	Supports commercial customers with refrigeration upgrades and low-GWP equipment to cut energy use and emissions.	Medium
Sector-specific demand response (DR) programs	Designs tailored DR offerings for specific business sectors to boost participation and enhance grid reliability.	Low
Strategic energy management (SEM) for industrial facilities	Helps industrial customers improve efficiency through training, technical assistance, and ongoing performance tracking.	Low
Financing and incentive stacking support	Helps customers combine multiple incentives and financing options to overcome upfront cost barriers.	Low

Program	Intervention Summary	Priority Level
Increase e-mobility access and advanced electric vehicle/charging infrastructure	Expands EV charging and e-bike access in workplaces, multi-family housing, and public spaces to promote equitable transportation electrification.	Low
Credit-boosting equity direct install (DI) program	Offers direct-install efficiency and electrification measures with credit-building tools for low-income customers.	Low
Codes and standards / reach codes support	Duplicates existing statewide code efforts but could support future coordination if gaps emerge.	Not recommended
Workforce education and training (WE&T)	Overlaps with current regional programs; could fill training gaps through future partnerships.	Not recommended
Resilience, decarbonization showcase, and pilot projects	Demonstrates clean energy technologies but is resource-intensive and less scalable in the near term.	Not recommended

OCPA can begin implementing high-impact programs quickly while building capacity, refining design and delivery mechanisms, and pursuing external funding to expand its portfolio over time. The CPP provides the strategic and analytical foundation to ensure efforts remain aligned with operational and community needs and vision. The sections that follow detail the context, analyses, and program strategies that will guide OCPA's implementation of this plan and will support the agency's ongoing commitment to delivering local, sustainable, and equitable energy.

III. Introduction and Background

OCPA BACKGROUND

About OCPA

The Orange County Power Authority (OCPA) is a **community choice aggregator (CCA)** established in 2020 and launched in 2022 as a Joint Powers Authority (JPA) to give Orange County residents and businesses a cleaner, affordable, and locally controlled alternative to purchasing electricity from a traditional investor-owned utility. As a public agency, OCPA procures electricity on behalf of its member jurisdictions: the cities of **Buena Park, Fullerton**, and **Irvine**, and soon the **City of Fountain Valley**. OCPA reinvests its revenue back into the communities it serves through customer programs, renewable energy investments, and local economic development initiatives.

Since launching service in 2022, OCPA has expanded renewable energy access and customer choice across its participating cities. By focusing on local accountability and transparency, OCPA aims to catalyze the region's clean energy transition while supporting long-term community resilience and economic vitality.

OCPA's Strategic Vision

OCPA's strategic vision is to *"think globally and act locally by empowering our communities with choice in energy needs. We are committed to transforming the energy landscape, driving a sustainable future and beyond by empowering and enabling our communities, and ensuring that no community is left behind in this transition to renewable energy."*

This vision guides OCPA's efforts to deliver energy programs and services that are local, clean, and equitable. It emphasizes both global responsibility and local empowerment—ensuring that the benefits of the clean energy transition reach every community OCPA serves.

To advance this vision, OCPA focuses on three key principles:

- **Local:** Prioritizing investments that create community benefits (such as local job creation, workforce development, and infrastructure improvements) within OCPA's member jurisdictions.
- **Sustainable:** Procuring renewable and carbon-free resources to provide reliable, affordable energy that supports California's decarbonization and climate goals.
- **Equitable:** Providing renewable energy at competitive rates and reinvesting revenues in programs that expand access and opportunity for all customers, particularly those in disadvantaged and historically underserved communities.

By acting on these principles, OCPA is working to build a more sustainable, inclusive, and resilient energy future for Orange County; one that empowers local communities while contributing to the broader transition to a clean energy economy.

COMMUNITY POWER PLAN OVERVIEW

History of Community Power Plan Approval

The **Community Power Plan (CPP)** was initiated to provide OCPA with a comprehensive roadmap for developing and implementing customer programs that advance its strategic goals. The plan was approved by the OCPA Board of Directors in **February 2026**, following a collaborative planning process that incorporated input from member agencies, community stakeholders, OCPA staff, and technical experts.

The CPP reflects OCPA's commitment to making decisions and designing programs based on evidence and data. It integrates community feedback, market assessments, and technical analyses to prioritize program initiatives that will deliver measurable and equitable benefits to customers while supporting state and local policy objectives.

Community Power Plan Guiding Principles

The CPP development process followed the guiding principles below to inform OCPA's approach to program development, community engagement, and resource planning. These principles ensured that the plan remained focused on local priorities while supporting statewide climate and energy objectives.

- **Address climate change by reducing energy-related greenhouse gas emissions.**
  The CPP supports OCPA's broader mission to advance decarbonization through clean energy, electrification, and demand-side management programs that reduce GHG emissions and improve air quality across Orange County.
- **Conduct a comprehensive Community Needs Assessment.**
  OCPA engaged with residents, businesses, and community-based organizations through multilingual surveys, workshops, and stakeholder meetings to identify community priorities, barriers, and opportunities for program participation.
- **Utilize industry research to establish the feasibility of various programs.**
  The CPP leverages best practices and technical analyses to evaluate potential programs based on implementation effort, timeline, cost, and revenue implications, ensuring that OCPA's initiatives are data-driven and scalable.
- **Collect and assess information on grants and plans that can augment services and incentives.**
  OCPA will pursue the identified funding opportunities that complement local efforts, including programs supporting building decarbonization, zero-emission transportation, and community resilience. These resources will help maximize benefits for member cities and their residents while enhancing program affordability and reach.

Together, these guiding principles provide the foundation for a coordinated, equitable, and results-oriented approach to community energy planning, ensuring that OCPA's programs are both responsive to local needs and aligned with broader climate action efforts.

Community Power Plan Process Overview

The **Community Power Plan** was developed through a multi-phase, data-informed process designed to align community needs, operational feasibility, and program impact. Each phase built upon the previous one to ensure OCPA's program investment strategy is responsive to community priorities and realistic for OCPA to implement.

- **Community Needs Assessment:** Engaged residents, businesses, and stakeholders to identify local priorities, learn what barriers prevented past program participation, and find opportunities for innovative program design. This assessment provided foundational insights into customer preferences, equity considerations, and areas where OCPA programs could deliver the greatest local benefit.
- **Operational Alignment Assessment:** Surveyed OCPA staff and leadership to gather insights on which program types, delivery models, and structures would best support OCPA's customers and organizational objectives. The findings emphasized how well-designed programs can advance OCPA's operational goals such as managing electricity procurement costs, enhancing load flexibility, and improving customer satisfaction while reinforcing OCPA's mission of providing local, clean, and equitable energy.
- **Existing Programs Assessment:** Conducted a comprehensive review of statewide, regional, and local energy programs to identify overlaps, gaps, and coordination opportunities. This analysis helped OCPA pinpoint where new or expanded offerings could complement (not duplicate) existing programs and where OCPA could add unique value through targeted investments and local engagement.
- **Funding Opportunities Assessment:** Examined potential funding streams to support OCPA programs. This assessment helped identify where external funding could reduce ratepayer costs, accelerate deployment timelines, and increase program accessibility across OCPA's service area.
- **Cost-Benefit Analysis (CBA):** Integrated findings from all prior assessments to evaluate each proposed program's relative impact and feasibility. The CBA produced a prioritized program concept portfolio that balances community benefit, cost-effectiveness, and implementation readiness.

This comprehensive approach ensures that OCPA's future program investments are strategic, equitable, and grounded in data. The CPP serves as both a guiding framework and a living document; one that will evolve as OCPA continues to grow, innovate, and respond to changing community and market conditions.

IV. ASSESSMENTS

COMMUNITY NEEDS ASSESSMENT

GOAL

The community needs assessment was conducted to engage community members of OCPA member agencies to hear about their energy needs and program priorities. In addition to surveys, OCPA representatives attended community events to engage in conversations with community members and record their insights.

PROCESS

The community needs assessment ran from February 2025 through August 2025, and included multiple strategies to engage the OCPA community and learn about their energy priorities. To reach this broad and diverse community, OCPA conducted multiple engagement strategies including a survey, listening sessions, tabling events and newsletter distribution. Surveys were made available in these following 10 languages: English, Traditional Chinese, Simplified Chinese, Korean, Vietnamese, Spanish, Farsi, Arabic , Filipino, and Japanese.

The Asian Business Association of Orange County (ABAOC) was selected as a contracted partner to support community outreach to inform the Community Power Plan (CPP). ABAOC and its collaborative partners leveraged their deep community roots and multilingual capacity to support culturally responsive outreach and conduct listening sessions to gain critical feedback on energy needs and preferences. ABAOC often worked through partner networks to support broadscale efforts to solicit input from member communities through events and surveys.

Table 2 shows the various engagement methods used throughout the community engagement process as well as target number of community members engaged and the actual number engaged.

Table 2. Community Needs Assessment Engagement and Outreach Activities

Engagement & Outreach Method	Target	Actual
Survey (digital and paper)	1,000	1,244 (Orange County participants)
Listening sessions (for community members and specific OCPA customer sectors e.g. business)	200 engaged 7 events	87 engaged 7 events
OCPA and outreach partner tabling	200 engaged 10 events	1,290 engaged 25 events
Newsletter outreach	6,000	54,740

Data Collection

The goal of the engagement and outreach was to collect customer insight either through the survey or through a facilitated listening session. Newsletter and tabling events helped direct and facilitate community member participation in surveys and listening sessions.

Survey: The survey asked key questions such as what customer energy needs are, what types of programs they participated in previously and what barriers they have experienced when trying to participate in

programs. The survey was developed for both residential customers and business customers. The survey was posted on OCPA's website, distributed through social media channels, partners, and a community engagement partner, the Asian Business Association of Orange County.

Listening Sessions: OCPA participated in seven community events in the member cities of Buena Park, Irvine, Fullerton, and Fountain Valley. In all, an estimated total of 80 residents, business leaders, and organization leaders participated in "Listening Sessions" to share insights about their biggest energy concerns, knowledge of, and participation in energy programs, and barriers to access for the energy support the community most needs.

KEY TAKEAWAYS - SURVEY

Takeaway 1: Residential and Commercial Customers were least aware of the following programs (Appendix Q, Figure 1):

1. 8% were aware of assistance to help customers take advantage of rebates or energy-saving measures
2. 11% were aware of electric vehicle and/or charging incentives
3. 11% were aware of clean energy Programs and plans (such as OCPA's 100% renewable choice plan or allowing customers unable to install solar panels to benefit from clean energy programs)

Takeaway 2: 25% of Residential and Commercial Customers have not made energy improvements. 32% of customers that did make energy improvements installed energy-efficient technologies or appliances (e.g. air conditioner, electric water heater, insulation, LED lighting, smart thermostat) (Figure 2).

Takeaway 3: The most important electricity issue for residential and commercial customers is reducing energy bill costs (ranked #1 106 times), followed by breathing cleaner air indoors and outside (ranked #1 60 times) (Figure 3).

Takeaway 4: Residential and commercial customers would most like to see the following electricity-related improvements (Figure 4):

1. Improving air quality (indoor and outdoor) with electric appliances and electric vehicles (25%)
2. Building more renewable energy projects (solar panels, batteries) and providing power line and system upgrades (18%)
3. Helping families pay or reduce their energy bills (13%)

KEY TAKEAWAYS - LISTENING SESSIONS

Takeaway 1: Community members most commonly reported these energy-related concerns:

1. Lack of information around, and inaccessibility of, energy programs

2. High energy bills and increasing rates
3. Reliability and power outages

Takeaway 2: Community members additionally reported limited awareness of OCPA and how it serves their community. Most were unfamiliar with OCPA's customer programs and offerings.

Takeaway 3: They cited the following barriers to participating in energy programs:

1. Awareness and lack of education
2. Trust and legitimacy concerns
3. Complexity and difficulty in understanding offerings
4. Concerns about the political climate and exposing one's identity and citizenship status
5. Language accessibility
6. Not meeting qualifications

Takeaway 4: They expressed interest in the following energy programs the most:

1. Rebates, particularly related to heating, ventilation, and air conditioning (HVAC)
2. Home assessments to identify savings opportunities
3. Youth education and workforce education & training
4. Education focused on lowering energy costs

Both the survey and listening sessions surfaced several consistent themes: limited awareness, affordability as the primary driver, and the strong value customers place on cost savings and health benefits. They also underscore the need for programs to address barriers related to trust, complexity, and equity in order to achieve broader participation.

NEXT STEPS

Community priorities and needs will be included in the Cost-Benefit Analysis and evaluated alongside the findings from the other assessments. In addition, community insights and considerations for barriers to clean energy projects and the type of support and resources that can address those barriers will be included in the design of the recommended programs.

OPERATIONAL ALIGNMENT ASSESSMENT

GOAL

The Operational Alignment Assessment surveyed key OCPA staff and leadership for their perspectives on which energy program types and structures would best serve OCPA and its customers. The findings highlight how well-designed programs can advance OCPA's operational goals, including managing electricity procurement costs and improving customer satisfaction.

PROCESS

The Operational Alignment Assessment is based on findings from two surveys. To understand staff and leadership perspectives, OCPA surveyed multiple staff from each department: communications and external affairs, power resources, fintech, regulatory and legislative, and leadership. The survey also included representatives and staff from all four current member cities: Buena Park, Fountain Valley, Fullerton, and Irvine.

Survey questions focused on priorities and considerations for OCPA as they consider and launch new customer programs (a full list of questions is shown in Appendix H).

KEY TAKEAWAYS - OCPA STAFF SURVEY

Takeaway 1: As shown in Table 3 below, staff's top priorities for OCPA community programs include load shifting, impact on communities of concern, and customer energy rate reduction. OCPA's definition of communities of concern is aligned with the CPUC's definition of underserved communities and customers.[1]

Table 3. OCPA Staff Survey: Customer Program Priorities

Priority	Score	Overall Ranking
Load Shifting	46	1
Impact on Communities of Concern	39	2
Customer Energy Rate Reduction	37	3
Incremental GHG Impact	33	4
Energy Use Reduction	31	5
Air Pollutant Impact	25	6
Electric Reliability	23	7
Economic Impact	20	8
Extreme Heat Mitigation	16	9

Takeaway 2: As shown in Table 4, staff's top consideration as OCPA prepares to launch new programs is customer satisfaction followed by benefit to OCPA region and the cost to OCPA.

1 The CPUC's definition of underserved communities and customers is defined in Pub. Util. Code Sections 1600 - 1640, enacted by Assembly Bill 841 (Stats. 2020, Ch. 372). Details of the definition are outlined in Appendix I.

Table 4. Top consideration as OCPA prepares to launch new programs

Consideration	Score	Overall Ranking
Customer satisfaction	21	1
Benefits to OCPA region	18	2
Cost to OCPA	14	3
Impact on internal staff	7	4

Takeaway 3: As shown in Table 5, the services that staff believe would most benefit OCPA customers are energy advisor/technical assistance, financing, and bill credits.

Table 5. Services that would most benefit OCPA customers

Services	Score	Ranking
Energy advisor	16	1
Financing	15	2
Bill credits	14	3
Turnkey installation/retrofit for the whole building	7	4
Marketplace for energy-efficient, clean energy appliances	6	5
Education	5	6

KEY TAKEAWAYS - OCPA MEMBER CITIES SURVEY

Takeaway 4: As shown in Table 6, types of programs that member cities believe would most benefit OCPA customers include electric vehicle and community education and engagement.

Table 6. Types of programs that would most benefit OCPA customers

Program Types	Score	Ranking
Electric vehicle infrastructure and incentives	4	1
Community education and engagement on clean energy	4	1
Incentives for energy-efficient appliances and retrofits	3	3
Solar panel and battery storage programs	3	3
Workforce training for clean energy jobs	3	3
Resilience programs (e.g., backup power systems, microgrids)	1	6
Air quality improvement programs	1	6

Takeaway 5: As shown in Table 7, the types of programs that member cities believe would be the most helpful to them include outreach materials tailored for residents and grant funding or technical assistance.

Table 7. Support or resources from OCPA that would be most helpful to your city

OCPA Support/Resources	Score	Ranking
Outreach materials tailored for residents	4	1
Grant funding or technical assistance	3	2
Guidance on integrating clean energy in city planning	2	3
Help coordinating with utilities or regional agencies	2	3

NEXT STEPS

Program priorities based on these findings will be included in the Cost-Benefit Analysis and evaluated alongside the findings from the other assessments. The Operational Alignment survey participants provided important insights into the barriers to completing clean energy projects and the type of programs that could address those barriers. These insights will be incorporated into the design of the recommended programs.

EXISTING PROGRAMS ASSESSMENT

PURPOSE

This assessment provides an overview of the landscape of energy programs currently available to OCPA customers. The assessment's goal was to inform Orange County Power Authority (OCPA) of existing programs and identify the types of programs OCPA could potentially administer, including energy efficiency, demand response, distributed energy resources (such as solar, storage, and electric vehicle (EV) charging), community solar, and equity-focused customer programs. The assessment focused on energy programs offered in California by other community choice aggregators (CCAs), state and regional agencies, non-profits, and regional energy networks (RENs).

PROCESS

The assessment began with a survey of programs with publicly accessible information, such as the California Energy Data and Reporting System (CEDARS) database (a full list of sources is available in the appendix). Program offerings from the following entities were reviewed:

- Regional energy networks (RENs)
- California Energy Commission (CEC)
- California Public Utilities Commission (CPUC)
- California Air Resources Board (CARB)
- South Coast Air Quality Management District (SCAQMD)
- Municipal and investor-owned utilities in California

A total of 37 programs were assessed, 13 of which are offered by other CCAs (e.g., Clean Power Alliance, Peninsula Clean Energy, San Diego Community Power, Marin Clean Energy, and Central Coast Community Energy).

After identifying programs and gathering publicly-available data, the programs were reviewed for alignment with OCPA's organizational goals (see Operational Alignment for details on OCPA goals). Lastly, program information was encoded, compiled into tables, and visualized through figures to develop initial insights on existing program gaps and to guide overall recommendations.

OBSERVATIONS AND ANALYSIS OF EXISTING PROGRAMS

The team analyzed the following characteristics that are described in further detail in Appendix K:

- Target market sector
- Program type
- Program delivery methods
- Energy savings measures
- Priority population served
- Application process
- Funding and funding source

Target Market Sector: The assessment indicated that a wide range of programs are available for the residential and commercial sectors, while fewer options are available for industrial and agricultural sectors and for cross-cutting programs (which serve multiple customer types) (Appendix R, Figure 5). This distribution generally aligns OCPA's customer account distribution, which has significantly more residential than commercial, industrial, or agricultural accounts (Figure 5). However, it is important to note that medium and large commercial and industrial customers account for the majority of OCPA's overall energy consumption (Figure 5). (See more details about OCPA's customer demographics and energy load in the OCPA Customer and Energy Portfolio Summary).

Program Type: Most existing programs focused on energy efficiency, building electrification, and education and training (Figure 6). Approximately 75% of the programs in the assessment had a priority population service component, such as focusing on disadvantaged communities (Figure 7).

Program Delivery Methods: Energy programs can have a variety of mechanisms for bringing benefits to their target market. For example, they may provide grants, rebates, or technical assistance. The most common delivery elements of the programs in the assessment were rebates and technical assistance (Figure 8). Grants, up-front incentives (discounted price), on-bill or affordable financing, and bill/tax credits were the least common delivery elements.

Energy Savings Measures: Energy saving measures are actions, changes, or technologies that reduce energy consumption. The most common energy saving measure in the assessed programs was water heating, followed by controls, HVAC, and building envelope measures such as cool roofs and high-performing windows (Figure 9).

Application Process: Many existing incentive programs have application processes that are arduous for customers to navigate, particularly when participating requires customized calculations, regulatory review, and complex documentation (Figure 10). This insight comes from reviewing publicly-posted application requirements for program participation and from the team's experience guiding participants through similar programs, which frequently involve complex documentation, lengthy approval timelines, and unclear instructions. We found that programs for larger capital projects, such as those targeting commercial and industrial sectors, have more complex application requirements. However, some residential programs had similarly complex application processes.

Funding: While many CCA programs are funded using internal funds, the US Department of Energy (DOE) is a significant funding source, particularly for projects administered through the California Energy Commission (CEC) (Figure 11). Federal funds are often allocated to pilot programs, technology demonstrations, and initiatives aimed at advancing clean energy innovation and market transformation.

The California Public Utilities Commission (CPUC) provides a major source of state-level funding, particularly for programs administered by RENs and investor-owned utilities. CPUC funding often focuses on energy efficiency, demand response, and distributed energy resource programs to align with statewide decarbonization and equity goals. One challenge with existing programs that exclusively use CPUC funds is that the funding is restricted to specific energy saving measures. Essential decarbonization activities, like EV charging infrastructure or refrigerant management, usually do not qualify for this funding. To ensure timely progress towards state climate goals, new comprehensive programs are needed to help cover these costs.

EXISTING PROGRAM GAPS AND RECOMMENDATIONS FOR OCPA

1. Invest in Demand Response (DR) Programs

Demand response (DR) programs generally require minimal upfront investment, are simple to enroll in, and often provide clear, predictable financial incentives tied directly to participation. Many DR technologies are automated or semi-automated, making it easy for program participants to participate since they don't have to make significant active changes to their behavior.

Our program assessment found that the agricultural and industrial sectors are underserved by current programs. It typically takes a lot of capital to complete efficiency and electrification projects in these sectors, making it difficult and costly to provide programs to support them. While OCPA does not service much load from agricultural accounts, OCPA could bridge this gap and drive program engagement in these sectors with simple DR programs customized to agricultural and industrial customers. For example, OCPA could offer flexible load management technologies or custom participation agreements, delivering both customer savings and grid benefits.

2. Renter-Focused Programs

The assessment found that while around 40% of available residential programs were technically open to renters, most of these programs required landlord approvals and were not tailored specifically to renters' unique needs. Unlike homeowners, renters can't make decisions about large-scale upgrades like new appliances or heating and cooling systems without written owner permission. This lack of control is a significant barrier to participating in traditional efficiency or electrification programs.

A direct-to-renter program should incorporate:

- Demand response (DR) enabling technologies that allow renters to actively participate in energy savings and load management initiatives without requiring modifications to their homes.
- Portable and non-invasive equipment options that enhance energy efficiency, comfort, and air quality without the need to replace existing appliances. Examples include portable batteries, heating, ventilation, and air conditioning (HVAC) units, plug-in induction cooktops, air purifiers, countertop air fryers, and other plug-and-play technologies.

By combining easy-to-use technologies with strategies to encourage energy-saving action, this program approach would lower participation barriers for renters while contributing to peak load reduction, energy savings, and improved indoor air quality in the residential sector.

3. Invest in Industrial and Cross-Cutting Programs

The assessment has shown that the industrial and cross-cutting sectors are underfunded relative to the residential and commercial sectors (Figure 5, Figure 12). However, programs in the industrial and cross-cutting sectors are an opportunity for OCPA to create meaningful impact.

In the industrial sector, facilities face two major barriers to participating in energy programs: essential equipment cannot easily be taken offline, and high upfront costs limit capital projects. For this reason, a strategic energy management (SEM) program, similar to the SPARKe program, is recommended. By focusing on operational efficiencies, workforce practices, and long-term planning rather than large capital projects, SEM directly addresses these barriers while still delivering measurable energy savings.

In the cross-cutting sector, the assessment identified that opportunities often span multiple domains (e.g., transportation, buildings, workforce), but existing funding and program models are siloed. To respond, OCPA could create holistic programs that integrate these focus areas and leverage regional/state planning grants, capacity-building funds, and affordable financing. This approach aligns with the assessment's finding that collaboration and accessibility are lacking, and it helps ensure underfunded communities can participate at scale.

4. Accelerate Electrification Efforts

The assessment found that while many existing programs include some support for electrification, they often fall short. The funding they provide typically does not cover a sufficient portion of project costs, and the resulting financial gap makes it difficult for people to adopt electrification technologies like heat pumps or electric vehicles. As a result, the transition to electrification is not progressing fast enough to meet state and regional goals for reducing carbon emissions and improving air quality.

A new electrification program that addresses the shortcomings of existing programs would help accelerate market transformation. OCPA could develop a program that delivers the following environmental and customer benefits:

- Work alongside existing incentive programs, making it easier and more affordable for customers to switch to cleaner energy appliances and vehicles.
- Support residential, commercial, and industrial sector collaboration on electrification initiatives.
- Improve the design of solar and battery storage systems, optimizing their performance and enhancing resilience.
- Improve indoor air quality while significantly reducing greenhouse gas emissions.

The assessment found electrification is a high-impact, strategic investment area.

NEXT STEPS

The findings from this assessment are incorporated into the cost-benefit analysis to determine priority program types for further evaluation. Additionally, through the Cost-Benefit Analysis, the data collected was used to identify overlapping programs, uncover opportunities for strategic partnerships, and highlight best practices that can be replicated to enhance program effectiveness.

FUNDING OPPORTUNITIES ASSESSMENT

PURPOSE

This assessment was developed to identify funding opportunities for OCPA and member agencies to support activities including program management, implementation, and/or enhancements to program offerings that are aligned with the Community Needs Assessment priorities.

PROCESS

This assessment was implemented in phases:

- **Phase 1:** In the first phase, TEC has identified sources of funding information and created a tracking spreadsheet template (in Appendix N, see details below).
- **Phase 2:** In the second phase (which took place after the cost-benefit analysis), TEC reviewed funding sources and populated the tracking spreadsheet with information about opportunities that are aligned with the priorities identified in OCPA's Community Needs Assessment. OCPA may request that TEC keeps the tracking spreadsheet updated on a regular basis.

The funding landscape is changing rapidly and many funding opportunities require quick action to participate. OCPA is using a phased approach for this assessment to ensure the most up-to-date information is included in the final report. The assessment includes substantial redundancy in its information sources to ensure all relevant opportunities were identified and included in the analysis.

CRITERIA FOR INCLUSION IN ANALYSIS

Funding opportunities were included in the assessment's analysis if:

- OCPA or a member agency is eligible to lead, or
- The opportunity is for a substantial $ amount (~ $500K or more) and OCPA or a member agency could be a funded partner.

The assessment included considerations such as funding amounts, competitiveness, application complexity, risk, and alignment with Community Power Plan priorities. It included recommendations for which funding opportunities were most promising based on these criteria. The completed assessment spreadsheet and associated recommendations was shared with OCPA staff in a meeting.

ANALYSIS - PRIORITIZATION AND RECOMMENDATIONS MEMO

After the tracking spreadsheet is populated with relevant opportunities, the TEC team conducted an analysis and summarized the findings in a draft memo (Appendix O) that includes opportunities evaluated, suggested prioritization, trends observed, and other insights.

TEC then met with OCPA staff to review the tracking spreadsheet and the draft memo. Staff feedback was incorporated into a final memo.

V. PROGRAM RECOMMENDATIONS

RECOMMENDED PROGRAM INITIATIVES

Based on the comprehensive Cost-Benefit Analysis (CBA) process which integrated findings from the Community Needs, Operational Alignment, and Existing Programs Assessments, program initiatives were classified into priority tiers using both impact and feasibility scales. The CBA applied a structured scoring tool and committee-based review process to evaluate each initiative against quantitative criteria such as ratepayer savings, emissions reductions, and implementation viability, as well as qualitative factors reflecting community benefit and alignment with OCPA's mission. This approach enabled OCPA to distinguish between high-potential initiatives and those with limited alignment or near-term feasibility. Importantly, this evaluation framework balances analytical rigor with OCPA's principles of being local, sustainable, and inclusive, ensuring that recommended initiatives advance measurable outcomes while embodying the agency's commitment to equitable community empowerment, environmental stewardship, and economic resilience.

The results highlight a small set of high-priority program initiatives that offer strong community benefits and feasibility, a group of moderate or low-priority initiatives that may merit further refinement, and several program concepts that were not recommended for advancement at this time. Each initiative's ranking reflects its combined CBA impact and feasibility score, informed by weighted community input, operational priorities, and comparative benchmarking against existing statewide and regional programs.

Table 9. Program Intervention Recommendations

Program	Priority Level
Direct-to-renter electrification and demand response (DR) program (residents/ small business)	High
Comprehensive energy efficiency and electrification	High
Refrigeration efficiency and electrification	Medium
Sector-specific demand response (DR)	Low
Strategic energy management (SEM) for industrial facilities	Low
Financing and incentive stacking support	Low
Increase e-mobility access and advanced electric vehicle/charging infrastructure	Low
Credit-boosting equity direct install (DI) program	Low
Codes and standards / reach codes support	Not recommended
Workforce education and training (WE&T)	Not recommended
Resilience, decarbonization showcase, and pilot projects	Not recommended

Two program initiatives emerged as **high-priority** candidates across both impact and feasibility criteria: a Direct-to-Renter Electrification and Demand Response (DR) offering, and a Comprehensive Energy Efficiency and Electrification program concept. Both demonstrated strong performance across impact and feasibility criteria, positioning them as well-aligned with OCPA's goals and strong candidates for near-term implementation and funding. Their high composite scores reflect exceptional performance in key CBA categories such as customer energy rate reduction, impact on communities of concern, and readiness for implementation. This indicates that these initiatives can deliver tangible benefits early in the CPP's rollout. Together, they embody OCPA's vision to leave no community behind by expanding access to clean energy

participation for renters, small businesses, and other underserved customer groups.

These programs directly reflect community and organizational priorities identified throughout the CPP assessments. The Community Needs Assessment found that reducing electricity bills was the top concern among survey respondents, a need addressed by both high-priority programs through lower energy costs and increased efficiency. The Operational Alignment Assessment identified customer satisfaction, load shifting, rate reduction, and impacts on communities of concern as OCPA's top programmatic priorities. All of these are advanced through targeted electrification, energy management, and demand response design. Likewise, the Existing Programs Assessment revealed that demand response (DR) offerings represent the single largest service gap in the current landscape, reinforcing the strategic importance of OCPA's Direct-to-Renter DR concept as an early investment focus. Collectively, these findings validate the CBA outcomes and illustrate how data-driven analysis, community priorities, and OCPA's core principles intersect to guide investment decisions.

The Refrigeration Efficiency and Electrification initiative ranked as a **medium-priority** program, representing a viable next-tier investment opportunity. This program model responds to findings from the Existing Programs Assessment that highlighted the need to accelerate electrification efforts across all sectors, and aligns with OCPA's operational goal of supporting community impact and cost reduction for high-usage businesses. Medium-priority programs such as this one represent valuable opportunities for long-term investment but may require additional design refinement, partnership development, or funding coordination before implementation.

At the other end of the spectrum, three program models—Codes and Standards / Reach Codes Support, Workforce Education and Training (WE&T), and Resilience, Decarbonization Showcase and Pilot Projects—were **not recommended** due to limited impact, lower feasibility, or overlap with existing initiatives.

The remaining initiatives were categorized as **low priority**, indicating that while they may hold potential community or operational value, they would benefit from further research, market validation, and resource planning before consideration for implementation.

HIGH-LEVEL PROGRAM DESIGN

Gap Analysis and Program Enhancements

ADDRESSING PROGRAM OVERLAP AND ENSURING COMPLEMENTARITY

The high- and medium-priority program initiatives identified through the Cost-Benefit Analysis were further evaluated to confirm that they complement, rather than duplicate, existing offerings within OCPA's service territory. This analysis demonstrates that OCPA's proposed program models target underserved customer segments, fill geographic and eligibility gaps left by current utility and statewide programs, and align with equity and decarbonization objectives across participating cities.

COORDINATION WITH EXISTING PROGRAM ADMINISTRATORS

OCPA will coordinate closely with Southern California Edison (SCE), SoCalREN, and the implementers of statewide programs such as Technology and Equipment for Clean Heating (TECH) Clean California to align program design, delivery, and customer targeting. This collaboration will ensure clear understanding of target customers and engagement activities, avoid unnecessary spending and duplicative efforts, and enhance customer experience through streamlined referrals and potential co-funding opportunities.

Formal collaboration may include:

- Coordination during program design, launch, and ongoing implementation
- Establishment of memoranda of understanding (MOUs) on coordination strategies and conflict resolution
- Staff training to understand complementary programs and coordination protocols to offer clear guidance to customers navigating options
- Data-sharing protocols or mechanisms to ensure complementarity and avoid duplication
- Joint outreach strategies to maximize customer reach.

EQUITY-DRIVEN TARGETING

Each OCPA program intervention emphasizes equity and accessibility by serving customers who are not adequately served by existing programs: particularly renters, small businesses, and households in climate zones 6 and 8, which are not prioritized under current SCE direct install initiatives. By tailoring eligibility criteria and incentive structures to these underserved segments, OCPA will expand market participation and ensure equitable distribution of program benefits. This focus on equity ensures OCPA's efforts advance statewide decarbonization goals while directly benefiting historically underserved communities..

PROGRAM-SPECIFIC GAPS AND ENHANCEMENTS

The following section reviews OCPA's high- and medium-priority program concepts, identifying specific market and service gaps that each program is designed to address. These descriptions highlight how OCPA's proposed initiatives complement, rather than duplicate, existing investor-owned utility (IOU), regional energy network (REN), and statewide offerings. Each subsection outlines key program differentiators, targeted customer segments, and opportunities for coordination with existing administrators. Additional detail on all referenced programs (including administrators, eligible measures, and geographic coverage) can be found in Appendix K. Existing Programs Matrix Spreadsheet.

Direct-to-Renter Electrification and Demand Response (DR) Program

Renters face significant barriers to electrification and energy participation due to limited control over major appliances and property upgrades. Existing programs, such as SCE's Multifamily Residential Direct Install Program (SCE_3P_2024R_MF_001), primarily target climate zones 9, 10, 13, 14, and 15 leaving OCPA's climate zones 6 and 8 underserved. SCE's direct install program designs are also limited in offerings due to CPUC EE ratepayer funded program rules, program cost-effectiveness requirements, and incentive eligible equipment types.

OCPA's Direct-to-Renter intervention will fill these gaps by offering portable, plug-and-play electrification solutions (e.g., induction cooktops, plug-in heat pumps, and efficient air purifiers) that do not require landlord approval. This initiative exemplifies OCPA's "no community left behind" commitment by prioritizing renters and small business customers often excluded from traditional energy programs.

In addition, OCPA can offer a residential demand response (DR) program that complements existing utility offerings. While SCE's Critical Peak Pricing program is designed primarily for commercial customers, an OCPA-led residential DR program approved by the California Public Utilities Commission (CPUC) as an eligible offering under Self-Generation Incentive Program (SGIP) would unlock access to TECH Clean California incentives for OCPA residents, as participation in a CPUC-approved DR program is a prerequisite for those incentives. This approach would expand affordability and program reach while ensuring alignment with statewide initiatives.

Comprehensive Energy Efficiency and Electrification Program

Current SCE residential and commercial programs, such as Energy Savings Assistance (SCE-13-ESA), Equitable Building Decarbonization Statewide Direct Install Program (EBD), Residential Direct Install (SCE-13-SW-001G), and Comprehensive Energy Efficiency Resource Program (SCE-24-Non-3P-001-Com), leave critical gaps in both eligibility and measure coverage. Many OCPA customers fall outside income qualification limits or are located in unserved climate zones. Furthermore, commercial offerings tend to focus narrowly on lighting and water heating, with limited HVAC and food service measures.

The proposed initiative can address these deficiencies by integrating audits, incentives, financing, and/or application support across both residential and commercial sectors. The program will emphasize electrification measures like HVAC upgrades, and induction appliances, while maintaining flexibility for energy efficiency measures such as LED lighting that are not eligible for incentives through traditional IOU programs. In line with OCPA's sustainable and local principles, the initiative supports emissions reduction and clean technology adoption through local delivery partners, helping build regional workforce capacity. By coordinating with SCE and TECH Clean California, OCPA will ensure complementarity, avoid redundancy, and leverage stackable incentives to maximize customer participation.

Refrigeration Efficiency and Electrification Program

Existing midstream and direct install offerings, such as SCE's Commercial Energy Efficiency Program (SCE_3P_2020RCI_005) and SoCalREN's Hard-to-Reach Commercial Direct Install Program (SCR-COM-E5), provide limited technical assistance and are designed primarily for small or hard-to-reach businesses. As a result, many medium and high-usage commercial customers within OCPA's service area, such as grocery stores, restaurants, and light industrial facilities, are excluded from participation or receive minimal support. These customers often have significant refrigeration and HVAC loads and peak load reduction opportunities, but lack access to comprehensive efficiency or electrification incentives through existing programs. Additionally, no programs currently focus specifically on refrigeration system electrification or low-global-warming-potential (GWP) refrigerant transitions in either the commercial or residential sector.

A refrigeration efficiency and electrification program can close these gaps by providing direct technical assistance, incentives for advanced commercial refrigeration equipment, and/or workforce training for refrigerant management to both residential and commercial HVAC. This approach advances OCPA's local principle by directly supporting the residential sector and strengthening the small and mid-sized businesses that anchor community economies, while also contributing to statewide decarbonization through sustainable technology transitions. These enhancements ensure alignment with statewide decarbonization goals while delivering tangible benefits to local food service and grocery businesses.

ONGOING PROGRAM DIFFERENTIATION AND REVIEW

OCPA will continue to assess program participation, customer satisfaction, and market evolution to ensure program differentiation and complementarity from existing offerings while maximizing benefits and outcomes for OCPA customers and OCPA as a load serving entity. Regular coordination with SCE, SoCalREN, and statewide implementers will enable program adjustments, ensuring each initiative remains complementary, equitable, and responsive to community needs.

Timeline and Portfolio Roll-out Strategy

OCPA will implement a phased roll-out strategy to ensure initiatives identified through the Cost-Benefit Analysis are developed in an organized and manageable manner. This approach will prioritize programs that are ready to launch and will have the greatest community impact. Launching new programs in phases will allow for flexibility as funding opportunities, regulatory conditions, and community needs evolve.

HIGH-PRIORITY PROGRAMS (1-2 YEARS POST-PLAN PUBLICATION)

High-priority program initiatives, specifically the *Direct-to-Renter Electrification and Demand Response (DR)* and the *Comprehensive Energy Efficiency and Electrification* program models, can be **immediately piloted or fully implemented within 1-2 years** of the CPP's adoption. These programs are both aligned with OCPA's near-term objectives of advancing electrification, increasing customer participation, and supporting equity outcomes.

To initiate delivery of these programs, OCPA will:

- Finalize design and delivery models, incorporating input, wherever necessary, from community choice aggregators, local jurisdictions, member cities, implementation partners, and community-based organizations.
- Conduct market validation, set budget, and establish baseline data for performance tracking.
- Develop marketing and outreach plans targeting priority customer segments (e.g., renters, small businesses, and hard-to-reach customers).
- Secure or confirm stackable incentive funding, including coordination with **TECH Clean California, Self-Generation Incentive Program (SGIP)**, and other funds that are approved by the California Public Utilities Commission (CPUC).

These activities will enable OCPA to deliver clear customer benefits within one to two years of publishing the plan.

MEDIUM-PRIORITY PROGRAMS (3-4 YEARS POST-PLAN PUBLICATION)

The *Refrigeration Efficiency and Electrification* program model, identified as a medium priority initiative, will move into the **pilot or development phase within 3-4 years** of the CPP publication. This program requires additional coordination, resource development, or technical scoping but is essential for expanding the depth and diversity of OCPA's program portfolio.

Key preparations will include:

- Conducting stakeholder engagement and facility assessments to refine program target measures.
- Identifying opportunities for partnership with SoCalREN, Southern California Edison (SCE), and trade allies to ensure OCPA's programs complement, not duplicate, existing programs

- Pursue funding through the CPUC's ATA process or other available mechanisms, enabling OCPA to implement programs using eligible CPUC ratepayer or external funds.

By year two, this program will be ready to scale and complement OCPA's program portfolio and support OCPA's decarbonization objectives.

LOW-PRIORITY PROGRAMS (5–10 YEARS POST-PLAN PUBLICATION)

Low-priority program initiatives (those that demonstrated potential value but did not appear feasible in the near-term) could be **developed and deployed within five to ten years**. This timeline allows OCPA to focus on refining its initial offerings, gathering performance data, and adapting its strategies to evolving regulatory, market, and technological conditions.

In the interim, OCPA will:

- Monitor policy developments and funding opportunities at the state and federal levels to determine optimal timing.
- Conduct feasibility studies and pilot-scale demonstrations as needed to validate emerging technologies or program designs.
- Coordinate with local governments and partners to ensure that long-term initiatives align with regional climate and energy goals.

This phased approach enables OCPA to scale its program portfolio responsibly by starting with initiatives that are implementation-ready and expanding into more complex or resource-intensive programs as organizational capacity and market readiness increase.

Budgeting and Funding Sources

One key factor in the CPP's success will be OCPA's ability to secure external funding and leverage regulatory pathways (such as the CPUC's ATA process) that expand opportunities to deliver clean energy programs using CPUC ratepayer and other state-supported funds. Funding programs through internal revenues offers OCPA the greatest flexibility to design initiatives that directly reflect community priorities and operational goals. As a relatively new organization, OCPA must balance program development with maintaining a strong financial position, meeting reserve targets, and supporting core operations. In the near term, the portion of revenues available for program funding will be modest, but this capacity is expected to grow as OCPA's customer base, financial reserves, and operational efficiencies expand. Supplementing these internal resources with external funding sources will be critical to scaling programs, piloting new models, and accelerating community benefits.

STATE AND FEDERAL FUNDING OPPORTUNITIES

Phase two of the Funding Opportunities Assessment identified additional funding pathways to support pilot projects and future program implementation. The Funding Opportunities Assessment and supplemental research summarized in the Funding Tracking Spreadsheet Template and Data Fields indicate that OCPA (or more likely its member agencies) can serve as either the lead applicant or as a partner agency for a number of grant opportunities.

The Funding Opportunities Assessment identified several key funding categories relevant to OCPA's potential programs. These include:

- **Mobility Access and Advanced Electric Vehicle and Charging Infrastructure,** which supports

clean transportation and EV adoption
- **Community-Based and Multi-Benefits**, emphasizing community resilience, equity, and decarbonization
- **Electrification**, which provides funding for residential and commercial building upgrades that replace fossil-fuel systems with clean, electric alternatives
- **Weatherization**, which supports energy efficiency and building envelope improvements
- **New Construction**, designed to encourage all-electric, high-performance building design.

Together, these categories represent major opportunities for OCPA and its member agencies to pursue funding for both pilot initiatives and full-scale implementation efforts.

For example, funding in the **Mobility Access and Advanced Electric Vehicle and Charging Infrastructure** category could support OCPA's Increase E-Mobility Access and Advanced EV/Charging Infrastructure program concept. Funds could be invested in site development, fleet electrification, and community charging access. Funding focused on community resilience and decarbonization within the **Community-Based and Multi-Benefits** category align with OCPA's Resilience, Decarbonization Showcase and Pilot Projects concept, even though this program is not prioritized for near-term implementation. Funding opportunities within the **Electrification, Community-Based and Multi-Benefits, Weatherization, or New Construction** categories that target energy efficiency and building electrification could be used to expand the Comprehensive Energy Efficiency and Electrification program model or pilot the Credit-Boosting Equity Direct Install (DI) initiative for low-income and hard-to-reach customers.

By coordinating these efforts with member agencies **Buena Park, Fullerton, Irvine, and Fountain Valley**, OCPA can pursue grants that align with local priorities while strengthening their competitiveness for state and federal awards.

CPUC APPLY TO ADMINISTER PROCESS

The **CPUC ATA** process provides a pathway for CCAs, such as OCPA, with a pathway for OCPA to become a Portfolio Administrator of energy efficiency and electrification programs funded by California ratepayer resources (Public Purpose Program funds overseen by the CPUC). Through this process, OCPA can submit a Business Plan Application to the CPUC requesting funding for a proposed portfolio of programs. Once approved, OCPA would have the authority to design and implement programs within its jurisdiction that align with state energy objectives and deliver measurable customer benefits.

Identified program initiatives that are particularly well-suited for this opportunity include:

- Refrigeration Efficiency and Electrification
- Comprehensive Energy Efficiency and Electrification
- Strategic Energy Management (SEM) for Industrial Facilities
- Credit-Boosting Equity Direct Install (DI)

Securing funding through the ATA process would strengthen OCPA's long-term capacity to design and deliver programs that are locally responsive and integrated within California's broader energy efficiency framework without relying solely on OCPA's own local revenue. While this pathway presents valuable opportunities, preparing and filing a CPUC Energy Efficiency Business Plan Application is a complex and resource-intensive process that entails careful planning and robust stakeholder engagement. Proposed portfolios must also satisfy CPUC cost-effectiveness criteria, ensuring that CCA-administered programs deliver measurable value to ratepayers.

STRATEGIC APPROACH TO FUNDING AND IMPLEMENTATION

OCPA's funding approach begins with the effective use of internal revenues, which provide the greatest flexibility to design and launch programs that directly reflect community priorities and operational goals. Internal funding allows OCPA to move quickly, tailor program design to local needs, and demonstrate early successes that strengthen credibility with customers, partners, and potential funders. While internal revenues will continue to play a foundational role, OCPA recognizes that expanding its program portfolio at scale will require layering additional external funding sources to increase impact and reach.

To maximize effectiveness, OCPA will employ a diversified funding strategy that combines internal resources with competitive grants from state and federal agencies and CPUC-administered program funding. This approach will:

- **Reduce the financial commitment from OCPA** by leveraging external funding sources to expand programs while maintaining a stable and sustainable revenue base for OCPA operations.
- **Promote near-term program readiness** by using internal funds to initiate design, partnership development, and community outreach activities while pursuing external funding for later implementation phases.
- **Establish scalable funding models** that blend internal and external sources in a repeatable framework, allowing OCPA to expand successful pilots into long-term, fully funded programs without over-reliance on a single funding stream.

OCPA will coordinate funding pursuits either directly or through partnerships with its member agencies to ensure that programs are well-resourced, complementary, and positioned for lasting success. This balanced approach will enable OCPA to maintain financial resilience, deliver meaningful community benefits, and grow its clean energy portfolio sustainably over time.

VI. APPENDIX

Appendix A. Community Power Plan Overview Flyers


에너지의 미래를
구축하는 데
기여하세요
ORANGE COUNTY
POWER AUTHORITY
YOUR CLEAN ENERGY CHOICE
Hãy giúp định hì
tương lai của
năng lượng

Appendix B. Addressing Engagement Barriers

ADDRESSING ENGAGEMENT BARRIERS

Recognizing that there are many barriers to community outreach, OCPA identified potential barriers and created strategies to address them, as shown in the table below.

Strategies to Address Barriers

Barrier	Strategy
Distrust of energy companies	Work with a trusted outreach partner. OCPA contracted with the Asian Business Association of Orange County to support with community outreach and facilitation of listening sessions.
Accessibility issues	OCPA translated the survey into 10 different languages (English, Farsi, Korean, Simplified Chinese, Spanish, traditional Chinese, Vietnamese, Tagalog, Japanese and Arabic). In addition, OCPA distributed printed copies of the survey at community events.
Lack of incentive to participate	OCPA and ABAOC provided food and raffle giveaways at listening sessions and tabling events. OCPA also provided gift cards through a raffle to survey participants to encourage participation.
Lack of subject matter expertise	OCPA developed materials for an energy-inexperienced audience and highlighted connections to health, financial, environmental, and community benefits
Inclusive reach of OCPA's diverse community	OCPA conducted a preliminary survey participant analysis at the midpoint of the assessment to understand the participant demographics. Based on this analysis, OCPA was able to identify underrepresented groups and areas of the OCPA territory and create a strategy to enhance outreach.

Appendix C. Listening Session Notes

LISTENING SESSION NOTES

Completed Listening Sessions

Session Title	Date	Location	Total Engaged
Buena Park Collaborative Focus Group	March 12, 2025	Buena Park	25
Buena Park Fit Committee	May 13, 2025	Buena Park	13
Fullerton Woman's Group	July 10, 2025	Fullerton	12
Irvine Listening Session	July 15, 2025	Irvine	10
Listening Session with Gen Z / Youth	July 28, 2025	Irvine	8
Key Feedback and Insights from Community & Businesses	August 19, 2025	Fullerton	8
Listening Session: Breakfast with OCPA	August 25, 2025	Fountain Valley	11
	Total		**87**

Buena Park Collaborative Focus Group

3/12/2025

Attendees:

- 25 local organization leaders and community members
- Gabe, Nataly

Barriers | Solutions

- QR code issues by not trustworthy/digital issues & security tech
  → Paper surveys are an option
- Lack of access to programs
  → Senior Center (Chase) is 15–20 min. drive / cell service is difficult
- Lack of follow through to improve efficiency & more awareness needed
  → Love Bean Park event (e.g., good connection)

- Filling out forms that are too long (the paper takes as many people to do it as if they were canvasing)
  → Educate staff on the app before doing training events and don't highlight it because it looks bad if staff do not know how to use it.
- Time consuming for front end app or brand awareness apps
  → iPad option for events for digital programs
- Lack of Awareness
  → Take surveys to church. Increase visibility (e.g., Family Resource Center, food tables, etc.). Connect to the 211 network
- Tell us who you are, not how to sign up & some background is important
- Mailed in different languages

Solutions

- Add a "Call to action" when sharing the survey (e.g., take it because...)
- Do not only do tabling events — consider city flyers, adding to water bills, and bulk mailers
- Word of mouth goes a long way
- Share & connect with school districts
- Referral: $5 if someone says they were referred by you

Editorial Notes

- Only ~2 knew about OCPA
- ~2 knew about discounts on bill but that is all they knew on programs

Buena Park Fit Committee

5/13/2025

- Attendance
  - 10 community members
  - 1 council member
  - 2 America on Track Staff
  - OCPA staff
    - Pranesh
    - Nataly
- Logistics:
  - In-person
  - English and Spanish translated PowerPoint and verbal presentation
- Main takeaways
  - What are the biggest concerns and needs in your community?
    - Solar Scams ex. Other countries have better solar systems than the US

        - Sparks from outlets
        - Education of community leads on energy programs for dissemination
        - Lack of information on energy programs
        - Lack of information related to economics of solar installations
        - If they are not income qualified, there is no information on how to proceed and they don't apply for the energy program
    - Have you participated in an energy program?
        - All did not raise their hand but one mentioned some may be enrolled in CARE/FERA
    - What barriers do you think prevent people from participating in energy programs? / What would help you participate in the future?
        - Recommended Friendly Center (Job fair at the beginning)
        - Giving Children Hope (Friday mornings)
        - Buena Park Counsel member Franco Carlos suggested connecting OCPA with the Orange County Apartment Association
        - Suggest support on multifamily and apartment building complexes to renovate a lot of their indoor electronics
        - Suggest a lot of more education empowerment because there's a lot of leaders and just more sharing out of programs there are and maybe even teach a teacher initiatives

Fullerton Woman's Group

7/10/2025, 10:30am-11:30am

Attendees: 12 attendees, Spanish speakers

Summary: We started with a general discussion of their energy bills, how climate change is causing warmer weather and increased energy consumption, and introduced the service Orange County Power Authority Provides.

Most of the women in this group's first language is Spanish and we met at a community room where they regularly gather to do activities. We took some OCPA freebies and donated art supplies to compensate them for their time. These women reflect the lower income Latin American population in the city of Fullerton. Most reported being renters living in apartments with the exception of 2 women. Their electricity bills ranged from $150-$300.

We covered how the residents in the city of Fullerton were opted in at Smart Choice as well as a brief summary of the different tiers available. A few ladies reported being on the CARE program and I explained that only in that instance where they have a discounted program with So Cal Edison might their bill be cheaper than with OCPA.

After the background and introductory information on OCPA, we explained the purpose of our visit was to gather community feedback for a community power plan. We cited examples of OCPA's programs and how they reinvest back into the community with workshops, programs, incentives and event community grants.

Community feedback to questions in the presentation:

What are the biggest concerns related to electricity in your community?

- Several cited increasing rates every year.
- One attendee asked why power shuts off and we explained that Edison has to do that occasionally where there is too much strain on the grid or if there is a fire danger that requires caution.

Have you participated in an energy program?

- Most were unfamiliar with energy programs except the 5 CARE participants.

What barriers do you think prevents people from participating in energy programs?

- Some said they don't understand or are not aware of energy programs. Most have not looked into solar for example, since they are renters.
- Others cited not qualifying for a program since their income may not meet the limit.
- Lastly, several said they are difficult to learn about due to the language barrier.

What would help you participate in an energy program?

- They cited an easy application process.
- Information and instructions in Spanish.
- Programs for renters.

One lady was able to pull up her bill and we were able to determine that they were on OCPA. All of the ladies in this session were unfamiliar with OCPA before this meeting but left with a good impression of the agency.

This listening session included key community leaders that represent numerous OCPA community members:

Jerry Chang, representing more than 2,200 seniors
Jerry Chang stands out as co-president of the Irvine Evergreen Chinese Senior Association (IECSA), which has over 2,200 members and hosts monthly meetings at the Lakeview Senior Center. Under his leadership, the board actively attends events, promotes Chinese culture, and serves the broader community.
Irvine Evergreen Chinese Senior Association (IECSA)

Mike Chen, representing over 2,500 local members
Mike Chen's impact spans generations. As a long-serving former president of the South Coast Chinese Cultural Association and Irvine Chinese School (SCCCA/ICS), he has been a true ambassador for the Chinese community, deeply engaged with youth, older adults, and everyone in between. Today, he continues this work as an Irvine City Advisory Commissioner, an advisor for Taiwan's Overseas Community Affairs Council, and through other leadership roles, representing over 2,500 members locally.
Mike Chen – Chinese American in Irvine

Irvine Listening Session

7/15/2025

Attendees: 10

Biggest Concerns and Needs in the Community:

1. Energy Costs & Programs
    - High cost of electricity bills (pricing is a concern)
    - Lack of education on how to lower utility bills
    - Unawareness of available programs (rebates, energy-saving options)
    - Confusion about qualification requirements for programs
      Not familiar with OCPA (community choice energy options)
2. Access & Communication Barriers
    - Website is very basic or hard to navigate
    - Language barriers with contractors/vendors (need for installers who speak the community's language)
    - Need more in-language support for rebate and installation processes
3. Vendor & Workforce Issues
    - Need for more qualified vendors
    - Lack of home energy assessment vendors who can come help
4. Adult Community Programs
    - Lack of financial literacy and resources on managing costs
    - Training and empowerment programs needed
    - Career pathways for trade and tech fields (more tech training)
5. Additional Notes
    - Community feedback mentioned trauma, environment, and church involvement as factors in some of the needs or challenges

Have you participated in an energy program?

- 1 person said only to charge Tesla, only after midnight
- EV charging → how does it work? - we explained it

What barriers do you think prevent people from participating in energy programs?
(Printed options at the bottom: Not aware of programs; Didn't know how to participate; Language barriers; They are time-intensive; Not enough resources)

Handwritten notes:

- Lack of info
- Video program
- Show person → link videos to website
- People don't know where to look into
- Up front cost like solar
- Rental place → too long to move for energy savings

- Serious issue → make it fun
- Paperless → cannot contract on bill
- Form emails to owners → name/brand

Top margin notes:
- Q's about letters
- Tax deductible fine during ?
- Q separate for "Yes" and "scanned programs?"

Listening Session with Gen Z / Youth

7/28/2028 5:30 PM – 6:30 PM

Attendees: 8 participants
- 1 high school student (he learned about the event through a SoCalYEA social media post)
- 6 college students
- 1 young professional

Key Insights
1. Awareness of OCPA and Programs
   - Only 2 participants had heard of OCPA before the listening session.
   - Most were unfamiliar with OCPA's customer programs and offerings.
   - While rebate programs for large appliances or household retrofits don't currently apply to this group (since they live in their parents' house, dorms, or apartments), participants were aware of energy-saving behaviors, such as reducing electricity use during peak hours.
2. Values and Community Perception
   - The group expressed a strong interest in clean energy and environmental responsibility.
   - They recognize that living in Irvine comes with certain privileges, such as better air quality compared to neighboring cities, and expressed appreciation for that.
   - While most currently drive gas-powered vehicles, many expressed a strong interest in switching to electric vehicles (EVs) once they are in a position to purchase their own car.
3. Community Needs and Observations
   - Some noted that certain highways and streets in the area are too dark and suggested using electricity for improved lighting in these areas.

Youth Suggestions for Outreach & Engagement
A. Education and Youth Involvement
- Increase youth-focused education efforts by:
  - Offering in-school presentations on energy and sustainability.
  - Sponsoring school clubs that promote clean energy awareness.

    - Providing more ambassador and internship opportunities for high school and college students.

B. Communication Strategies

- Focus on improving the visibility and appeal of OCPA's official website — make it more engaging, visual, and youth-friendly.
- Use social media platforms more effectively to reach younger demographics and raise awareness of OCPA programs.

C. Access and Motivation

- Participants observed that many people may lack access, motivation, or clear information on how to adopt clean energy practices.
- They recommended consistent and ongoing customer education — not just one-time outreach or infrequent sessions — to build long-term awareness and behavioral change.

Key Feedback and Insights from Community & Businesses

These were business leaders in the Hispanic, Korean and Vietnamese Community.

Their biggest concerns:

1. They need financial assistance
2. Cost of energy – they want to pay less in energy
3. Education – how to simplify this information so it is understandable and consumable by multicultural and multilingual audiences. Why it matters needs to be explained.
4. Using cleaner energy
5. Create partnerships with the community to get people curious, engaged and involved.
6. Are there any programs that would help local high schools? For example, Northwood High School in Irvine needs lighting for their new football stadium. If OCPA could assist, this would be a great way to educate and get schools, students, kids, parents and families to learn about and get more engaged and involved with OCPA.
7. To understand and learn about more resources for their communities – such as learning more about rebates or discounted items products on OCPA's marketplace website.
8. What to use for backup during power outages
9. Hispanic business owners are concerned about inflation, having adequate employees, helping their employees, and retaining them.
10. They are concerned that often the people with the lowest income get stuck buying the least efficient electrical equipment such as buying the window air conditioners that are less efficient and eventually cost more.
11. Equity and social justice issues
12. The leaders need help in identifying easy and simple ways to share this vital information with their senior and older adults' populations.
13. A lot of Hispanic communities throughout Irvine, Santa Ana and Orange County have relied on shopping malls and centers for air conditioning since they could not afford it in

their homes. The closure and conversion of shopping malls to housing negatively impacts low-income households' access to AC.

The barriers that prevent people from participating in energy programs:

1. Legal and political concerns like being afraid of ICE Raids
2. Distrust in private companies reselling energy (example: Texas).
    a. Non-efficient energy products are common in lower-income areas because cost barriers prevent upgrades.
3. Access – language and acculturations
4. Sustainability

The following would help them participate in a future program:

1. Cost assistance
2. Free or rebates or less expensive programs
3. Free energy kits
4. Clean Energy Options: Businesses want more choices to align sustainability and environmental goals.
5. Programs & Accessibility: Programs should be practical, easy to use, and communicated in simple, accessible language. Education is critical for long-term adoption and creating curiosity in the community.
6. Hispanic, Korean & Vietnamese residents require more accessible and understandable information on the long-term cost benefits and sustainable investments.
7. Grants & Support
8. Equity & Assistance:
    a. Utility assistance remains one of the highest needs, especially among low-income and Hispanic communities.
    b. Calls for senior discounts, renter-focused energy kits, and equitable decarbonization programs to support families transitioning to clean energy.
9. Renewable & Backup Power:
    a. They were concerned about the lack of renewable generation and backup power during outages (noted from Fullerton).
    b. Especially regarding EV charging rebates that exist, education is needed on costs, rebates, and home integration—especially for older housing.
10. Social Media & Visibility: Strong need to leverage social media and video content to educate residents, simplify concepts, show clear steps, and create curiosity and engagement around programs.

Their questions included:

Where does the source of the actual energy come from? They had a challenging time understanding this.

Participants

- Wells Fargo / Vietnamese Chamber of Commerce President
- Vibe Marketing Agency, Julian Castro
- Delhi Center, Oscar Leong

- Korean Chamber Leader & Transworld Business Advisors of OC, Alex Woo
- Korean Chamber Vice President Broker in Irvine Clair Na
- Stanley Suh
- Executive Director of 2-1-1 Orange County, Elizabeth Andrade
- Hispanic Chamber Representative

Listening Session: Breakfast with OCPA

8/25/2025

Attendance:11

- Population: Older adults living in older homes
- Presenter: Nataly Morales, Patty Oh and Eunice Chow

City: Fountain Valley

Meeting:

- Attendees do not know how OCPA works, Nataly and Patty explain what OCPA purchase energy from clean sources, eg. solar, wind and other renewable sources. They further explain that solar is a renewable energy as the panel are made of glass that is recyclable.
- Patty continues to explain that delivery/ infrastructure is still SCE, but the supplier is OCPA. It can be viewed on the monthly bill
- The team also explained that there will be notice coming next year about the switch and the residence will be made aware it.
- The team explained that currently OCPA has a few programs, which include Smart Thermostat for customers and the power pack. This meeting to gather information about what other programs the residents want to have.
- Concerns about how the federal government affects OCPA and the team shared about how OCPA financials work with rate payer funding and overall CCA explanation. An explanation of solar being better two years ago, Patty explained a few reasonings including the CPUC decisions and that OCPA wants to support gaps, Nataly shared the OCPA battery rebate as a small example.

Feedback:

- All attendees express appreciation for the Listening Session as it gives them opportunities to know more about the power supplier that is coming to their city next year 2026.

Programs that they are interested in:

- A program with rebates when they replace their heater to more energy efficient ones, most of them live in older homes that requires this replacement.

- A program that comes to their house to do an analysis where they can save money by using less electricity. Similar to energy advisor
- A program with rebates to buy portable fans. Most homes do not have central air as when it was built, Fountain Valley is not that hot temperatures as it is close to the beach, however recently due to climate change, it is a lot hotter.

Final thoughts:

- They mentioned that a lot of the current SEC programs in place is hard to qualify for them.

Feedback from 1st breakout group

- What are your biggest energy concerns?
    - Need cheaper
    - Need stable
    - Older homes -> water heater needed
    - Pollution -> clean air concerns
    - Cannot use rebate
    - Saving credit -> consuming lower gets you credit or money back like a demand program
- Have you participated in an energy program?
    - 4-9 try to to use large appliances or charging
- What barriers do you think prevent people from participating in energy programs?
    - The ones some they have heard of may be for low-income and they may not qualify for those
    - They did not know of programs
- What would help you participate in the future?
    - Anything to save money
        - One mentioned a 20% discount would be better than 3%
    - Lower rate
    - Trust is built with more face-to-face conversations

Feedback from 2nd Breakout Group (Patty)

- What are the biggest concerns and needs related to electricity in your community?
    - Reliability is important. One lady shared how a recent power outage fried and broke some of her appliances like her computer.
    - Consistent service and price.
- Have you participated in an energy program?
    - One participant shared he is on a plan where he reduces usage during peak times for a discount.
    - Another participant has gotten the tax credit for installing solar and getting an EV.
    - Some were not sure if they participated in an energy program or even what it was.

- What barriers do you think prevent people from participating in energy programs?
    - No time to research programs.
    - Hard to understand.
    - Not being able to trust a new organization.
- What would help you participate in an energy program?
    - Financial incentives that are good enough to make it worthwhile.
    - Easy application and process.

Appendix D. Tabling Events

COMPLETED TABLING EVENTS

Date	Location	Total Engaged
5/14/2025	RECON LIVE Small Business Diversity Network	20
5/26/2025	Orange County Business Council Meeting on Tariffs	50
5/29/2025	Congresswoman Young Kim's AAPI Heritage Month Roundtable with Community & Business Leaders	15
6/7/2025	Anaheim Green Expo	25
6/12/2025	Iranian American Chamber Small Business Mixer	100
6/14/2025	Filipino American Chamber Filipino Heritage Day	300
6/14/2025	4th Annual Cool Irvine Eco Fair	480
6/27/2025	City of Lake Forest 2nd Annual Multicultural Festival	100
6/28/2025	Councilmember Melinda Liu's Senior Expo	200
6/28/2025	Irvine Small Business Dev Day	25
7/4/2025	4th of July Woodbridge Parade	12
7/8/2025	ABAOC Workshop	20
7/10/2025	Business Expo at Fountain Valley Concert in the Park	31
7/17/2025	Fullerton Farmers Market	10
7/19/2025	Irvine Evergreen Chinese Senior Association Monthly Event	25

Appendix E. Long Form Community Needs Survey (English)

Orange County Power Authority Community Needs Survey

General Information

This survey will take 5-10 minutes to complete.

1. Are you an Orange County Power Authority (OCPA) customer?

- ◯ Yes, I am an OCPA customer
- ◯ No, I am not an OCPA customer
- ◯ Not sure

Orange County Power Authority Community Needs Survey

1. Do you receive an electricity bill for your business?

- ◯ Yes
- ◯ No

Orange County Power Authority Community Needs Survey

Business Customers (Page 1)

Please answer the following questions as a business customer.

All information is confidential and will not be shared or used for marketing purposes.

1. What is your business zip code?

2. What city is your business located in?

3. Do you rent/lease or own your place of business?

- ◯ Rent or lease
- ◯ Own
- ◯ Prefer not to answer
- ◯ Other (please specify)

4. What best describes your type of business?

- ◯ Accommodation/Hotels
- ◯ Beauty/Personal Care Services
- ◯ Biotech/Information Technology
- ◯ Business Services
- ◯ Construction/Manufacturing
- ◯ Finance
- ◯ Foods Services/Restaurants
- ◯ Healthcare
- ◯ Industrial/Manufacturing
- ◯ Real Estate
- ◯ Restaurant/Cafe/Food Services
- ◯ Retail/Wholesale/e-commerce
- ◯ Other (please specify)

5. About how many employees work for you?

- ◯ 0-4
- ◯ 5-9
- ◯ 10-19
- ◯ 20-49
- ◯ 50-99
- ◯ 100-249
- ◯ 250+

Orange County Power Authority Community Needs Survey

Business Customers (Page 2)

1. What are the major issues in your community? Select all that apply.

- [ ] Increased cost of goods and services
- [ ] Wildfires
- [ ] Heat waves
- [ ] Air pollution
- [ ] Cost of new construction and development
- [ ] Employee recruitment and retention
- [ ] Reliability of infrastructure (buildings, streets, parks, electricity, etc.)
- [ ] Misinformation
- [ ] Safety
- [ ] Other (please specify)

2. What electricity issues are most important to your business? Select all that apply

- [ ] Reducing my energy bill
- [ ] Breathing cleaner air indoors and outside
- [ ] Creating well-paying jobs in the energy sector
- [ ] Giving everyone the opportunity to switch from using fossil fuels (oil, gas) to cleaner forms of energy (solar, wind), regardless of income or location
- [ ] Building more local energy systems (like solar panels and battery storage)
- [ ] Keeping the power on at my business (preventing power outages)

3. What electricity-related improvements would you like to see most in your community? Select all that apply.

- [ ] Improving air quality (indoor and outdoor) with electric appliances and electric vehicles
- [ ] Building more renewable energy generating systems like rooftop solar on commercial buildings
- [ ] More efficient buildings that use less energy to reduce energy bills
- [ ] More comfortable buildings (e.g., improvements to keep buildings cool or warm)
- [ ] Access to & training for well-paying jobs in clean energy
- [ ] Helping families pay or reduce their energy bills
- [ ] Access to a professional that can recommend rebates and ways to save energy
- [ ] Backup power during outages
- [ ] Rewards for reducing electricity use during "peak hours" (4pm - 9pm)
- [ ] Support for power line and electricity system upgrades

4. Have you made any of the following energy improvements to your business? Select all that apply.

- [ ] Installed energy-efficient technologies or appliances (e.g. air conditioners, electric water heater, insulation, LED lighting, smart thermostat, etc.)
- [ ] Installed electric vehicle charging stations
- [ ] Installed solar panels and/or battery storage
- [ ] Completed an energy audit for my business
- [ ] I have not made any energy improvements
- [ ] Other (please specify)

5. We want to understand what kind of programs, if any, you have participated in or are currently participating in. Are you aware of any of the following types of local programs that may be available to you? Select all that apply.

- [ ] Incentives for energy-efficient technologies or appliances (e.g. air conditioners, electric water heater, insulation, efficient lighting, smart thermostat)
- [ ] Electric vehicle charging incentives
- [ ] Solar panels and/or battery storage incentives
- [ ] Rewards for reducing energy use during energy "peak hours"
- [ ] Clean energy programs that allow customers who are unable to install solar panels to benefit from clean energy projects
- [ ] Assistance to help customers to take advantage of rebates or energy saving measures
- [ ] I am not aware of any local programs
- [ ] Other (please specify)

6. Have you participated in any of the following types of programs? Select all that apply.

- [ ] Incentives for energy-efficient technologies or appliances (e.g. air conditioner, electric water heater, insulation, efficient lighting, smart thermostat)
- [ ] Electric vehicle charging incentives
- [ ] Solar panels and/or battery storage incentives
- [ ] Rewards for reducing energy use during energy "peak hours"
- [ ] Green rates or programs that allow customers who are unable to install solar panels to benefit from large scale clean energy
- [ ] Assistance to help customers to take advantage of energy incentives or energy efficiency measures
- [ ] I have not participated in any type of program
- [ ] Other (please specify)

7. Why would you not participate in an energy-related program like the ones listed above? Select all that apply.

- [ ] I am not aware of these programs
- [ ] The application process is too complicated
- [ ] Even with rebates, the technology is still too expensive
- [ ] I have not had time to research or participate
- [ ] I'm ineligible to take advantage of a program
- [ ] The program ended or incentives ran out by the time I was ready to participate
- [ ] Other (please specify)

8. Where do you get your information? Select all that apply.

- [ ] Websites (e.g. OCPA's Residential Product Marketplace)
- [ ] Online tools (e.g. Orange County Power Authority Incentive Finder)
- [ ] Social media
- [ ] Newspapers
- [ ] Word of mouth (friends, neighbors, colleagues)
- [ ] Advertisements (online, print, billboards, or radio)
- [ ] From a local community organization or newsletter
- [ ] From my city, county or local elected official
- [ ] Utility bill inserts or advertising
- [ ] Other (please specify)

Orange County Power Authority Community Needs Survey

Business Customers (Page 3)

Please share with us any final thoughts that will help OCPA create future opportunities for you to save time, money, and energy

1. Over the next 5 years, what would you like to see in your community to make it healthier and cleaner?

2. Is there anything else you would like OCPA to know in order to best serve you?

Orange County Power Authority Community Needs Survey

Residential Customers

1. Do you receive an electricity bill for where you live?

- ◯ Yes
- ◯ No

Orange County Power Authority Community Needs Survey

Residential Customers (Page 1)

Learning About Our Community Members

All information is confidential and will not be shared or used for marketing purposes.

1. What is your home zip code?

2. What city do you live in?

3. Do you rent or own your home?

- ◯ Rent
- ◯ Own
- ◯ Prefer not to answer

4. What best describes your housing?

- ◯ Single family home (e.g., house)
- ◯ Multifamily home (e.g., duplex, apartment, condo)
- ◯ Manufactured home (e.g., mobile home, trailer)
- ◯ Other (please specify)

5. What is your age?

- ◯ Under 18 years
- ◯ 18-34 years
- ◯ 35-44 years
- ◯ 45-54 years
- ◯ 55-64 years
- ◯ 65+ years
- ◯ I prefer not to answer

6. What is your race or ethnicity? Select all that apply.

- ☐ American Indian or Alaskan Native
- ☐ Asian or Asian Indian
- ☐ Black or African American
- ☐ Hispanic/Latinx
- ☐ Middle Eastern or North African
- ☐ Native Hawaiian or Other Pacific Islander
- ☐ White
- ☐ I prefer not to answer
- ☐ Other (please specify)

[ ]

7. What is your annual household income?

- ◯ $0 to $24,999
- ◯ $25,000 to $49,999
- ◯ $50,000 to $74,999
- ◯ $75,000 to $99,999
- ◯ $100,000 to $149,999
- ◯ $150,000 to $199,999
- ◯ $200,000 or more
- ◯ I prefer not to answer

8. How many people live in your household?

- ◯ 1
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5 or more

Orange County Power Authority Community Needs Survey

Residential Customers (Page 2)

Understanding Community Needs, Challenges, and Opportunities

We want to understand the needs, challenges, and opportunities you and your community are facing.

1. What electricity issues are most important to you? Select all that apply

- [ ] Reducing my energy bill
- [ ] Breathing cleaner air in my home and my community
- [ ] Creating well-paying jobs
- [ ] Giving everyone the opportunity to switch from using fossil fuels (oil, gas) to cleaner forms of energy (solar, wind), regardless of income or location
- [ ] Building more local energy systems (like solar panels and battery storage)
- [ ] Keeping the power on where I live (preventing power outages)
- [ ] Addressing climate change by reducing pollution

2. What electricity-related improvements would you like to see most in your community? Select all that apply.

- Improving indoor air quality by making buildings all-electric
- Improving outdoor air quality by increasing the number of electric cars, trucks and buses
- Building more large-scale renewable energy projects in Orange County
- Installing small-scale renewable energy (solar panels, batteries) on rooftops or parking lots
- More efficient buildings that use less energy and save money
- More comfortable buildings (e.g., improvements to keep buildings cool or warm)
- Access and training for well-paying jobs in clean energy
- Helping families pay or reduce their energy bills
- Access to a professional that can assess your home and recommend rebates and ways to save energy
- Backup power during outages
- Rewards for reducing energy use during energy "peak hours"

3. Have you made any of the following energy improvements to your home? Select all that apply.

- [ ] Installed energy-efficient technologies or appliances (e.g. air conditioner, electric water heater, insulation, LED lighting, smart thermostat)
- [ ] Installed electric vehicle charging and/or started driving an electric vehicle
- [ ] Installed solar panels and/or battery storage
- [ ] Completed an energy audit for my home
- [ ] I have not made any energy improvements
- [ ] Other (please specify)

4. We want to understand what kind of programs, if any, you have participated in or are currently participating in. Are you aware of any of the following types of local programs that may be available to you? Select all that apply.

- [ ] Incentives for energy-efficient technologies or appliances (e.g. air conditioner, electric water heater, insulation, LED lighting, smart thermostat)
- [ ] Electric vehicle and/or charging incentives
- [ ] Solar panels and/or battery storage incentives
- [ ] Rewards for reducing energy use during energy "peak hours"
- [ ] Electricity plans that deliver more renewable energy to customers (e.g. OCPA's 100% Renewable Choice Plan)
- [ ] Assistance to help customers to take advantage of rebates or energy saving measures
- [ ] I am not aware of any local programs
- [ ] Other (please specify)

5. Have you participated in any of the following program types? Select all that apply.

- [ ] Incentives for energy-efficient technologies or appliances (e.g. air conditioner, electric water heater, insulation, efficient lighting, smart thermostat)
- [ ] Electric vehicle and/or charging incentives
- [ ] Solar panels and/or battery storage incentives
- [ ] Rewards for reducing energy use during energy "rush hours"
- [ ] Electricity plans that deliver more renewable energy to customers (e.g. OCPA's 100% Renewable Choice Plan)
- [ ] Assistance to help customers to take advantage of energy incentives or energy efficiency measures
- [ ] I have not participated in any type of program
- [ ] Other (please specify)

6. Why would you not participate in an energy-related program like the ones listed above? Select all that apply.

- [ ] I am not aware of these programs
- [ ] The application process is too complicated
- [ ] Even with rebates, the technology is still too expensive
- [ ] I have not had time to research
- [ ] I'm ineligible to take advantage of a program
- [ ] The program ended or incentives ran out by the time I was ready to participate
- [ ] Other (please specify)

7. Where do you get your information? Select all that apply.

- [ ] Websites (e.g. OCPA's Residential Product Marketplace)
- [ ] Online tools (e.g. Orange County Power Authority Incentive Finder)
- [ ] Social media
- [ ] Newspapers
- [ ] Word of mouth (friends, neighbors, colleagues)
- [ ] Advertisements (online, print, billboards, or radio)
- [ ] From a local community organization or newsletter
- [ ] From my city, county or local elected official
- [ ] Utility bill inserts or advertising
- [ ] Other (please specify)

Orange County Power Authority Community Needs Survey

Residential Customers (Page 3)

Please share with us any final thoughts that will help us create an equitable and sustainable future

1. Over the next 5 years, what would you like to see when it comes to a healthy environment and community?

2. Would you like to enter for a chance to win a $250 gift card?

- ◯ Yes
- ◯ No

3. To enter for a chance to win a $250 gift card, please enter your contact information.

Name

Email Address

Orange County Power Authority Community Needs Survey

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Appendix F. Short Form Community Needs Survey (English)

Orange County Power Authority Community Needs Survey (Shortened)

Estimated time: under 5 minutes

Your feedback will help shape future energy programs and community initiatives.

1. Have you made any of the following energy improvements to your home? (Select all that apply)

- [ ] Installed energy-efficient appliances or technologies (e.g., A/C, water heater, smart thermostat)
- [ ] Installed EV charger and/or started driving an electric vehicle
- [ ] Installed solar panels and/or battery storage
- [ ] Completed an energy audit
- [ ] I have not made any energy improvements
- [ ] Other (please specify)

2. What types of energy-related solutions do you most want to see in your community? (Select all that apply)

- [ ] Improving indoor air quality through all-electric buildings
- [ ] Increasing electric vehicles (cars, trucks, buses) to improve outdoor air quality
- [ ] Large-scale renewable energy (e.g., regional solar/wind projects)
- [ ] Rooftop or parking lot solar and other small-scale renewable energy
- [ ] More efficient buildings to reduce energy bills
- [ ] More comfortable buildings (e.g., better heating and cooling)
- [ ] Clean energy job access and training
- [ ] Help for low-income families to reduce energy bills
- [ ] Access to expert energy advice
- [ ] Backup power during outages
- [ ] Rewards for reducing electricity use during peak hours

3. Why would you not participate in any energy programs?
(Select all that apply)

- [ ] I am not aware of these programs
- [ ] The application process is too complicated
- [ ] Even with the programs, the technology is still too expensive
- [ ] I have not had time to research
- [ ] I'm ineligible to take advantage of a program
- [ ] The program ended or incentives ran out by the time I was ready to participate
- [ ] Other (please specify)

4. Where do you get information about local programs?
(Select all that apply)

- [ ] Websites (e.g. OCPA's Residential Product Marketplace)
- [ ] Online tools (e.g. Orange County Power Authority Incentive Finder)
- [ ] Social media
- [ ] Newspapers
- [ ] Word of mouth (friends, neighbors, colleagues)
- [ ] Advertisements (online, print, billboards, or radio)
- [ ] From a local community organization or newsletter
- [ ] From my city, county or local elected official
- [ ] Utility bill inserts or advertising
- [ ] Other (please specify)

5. Are you aware of any of the following local energy programs? (Select all that apply)

- [ ] Incentives for energy-efficient appliances or technologies
- [ ] EV and/or charging incentives
- [ ] Solar panels and/or battery storage incentives
- [ ] Rewards for reducing energy during peak hours
- [ ] Electricity plans with more renewable energy (e.g., OCPA's 100% Renewable Choice)
- [ ] Assistance with accessing energy incentives or programs
- [ ] I am not aware of any local programs
- [ ] Other (please specify)

6. What is your home zip code?

7. What city do you live in?

8. Do you rent or own your home?

9. What best describes your housing?

10. What is your age?

11. What is your race or ethnicity? Select all that apply.

- [ ] American Indian or Alaskan Native
- [ ] Asian or Asian Indian
- [ ] Black or African American
- [ ] Hispanic/Latinx
- [ ] Middle Eastern or North African
- [ ] Native Hawaiian or Other Pacific Islander
- [ ] White
- [ ] I prefer not to answer
- [ ] Other (please specify)

12. What is your annual household income?

13. How many people live in your household?

14. Name

15. Email address

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Appendix G. Community Needs Survey Analysis Spreadsheet

View the community needs survey analysis by clicking the button below.

View Link →

Appendix H. OCPA Staff Operational Alignment Survey Analysis

OCPA STAFF OPERATIONAL ALIGNMENT SURVEY ANALYSIS

Survey Participation

Total Participants	6
OCPA departments that received 1+ survey response(s)	100%

SURVEY QUESTIONS AND SUMMARY FINDINGS

General Questions (shared with all departments)

1. As OCPA prepares to launch new customer programs, what priorities should OCPA keep in mind? Rank highest to lowest.

Priority	Score	Overall Ranking
Load Shifting	46	1
Impact on Communities of Concern	39	2
Customer Energy Rate Reduction	37	3
Incremental GHG Impact	33	4
Energy Use Reduction	31	5
Air Pollutant Impact	25	6
Electric Reliability	23	7
Economic Impact	20	8
Extreme Heat Mitigation	16	9

2. What considerations should OCPA keep in mind as it prepares to launch new customer programs? Rank highest to lowest.

Priority	Score	Overall Ranking
Customer satisfaction	21	1

Benefit to OCPA region	18	2
Cost to OCPA	14	3
Impact on internal staff	7	4

3. Are you familiar with any CCA or utility customer programs that you believe would benefit OCPA as well?

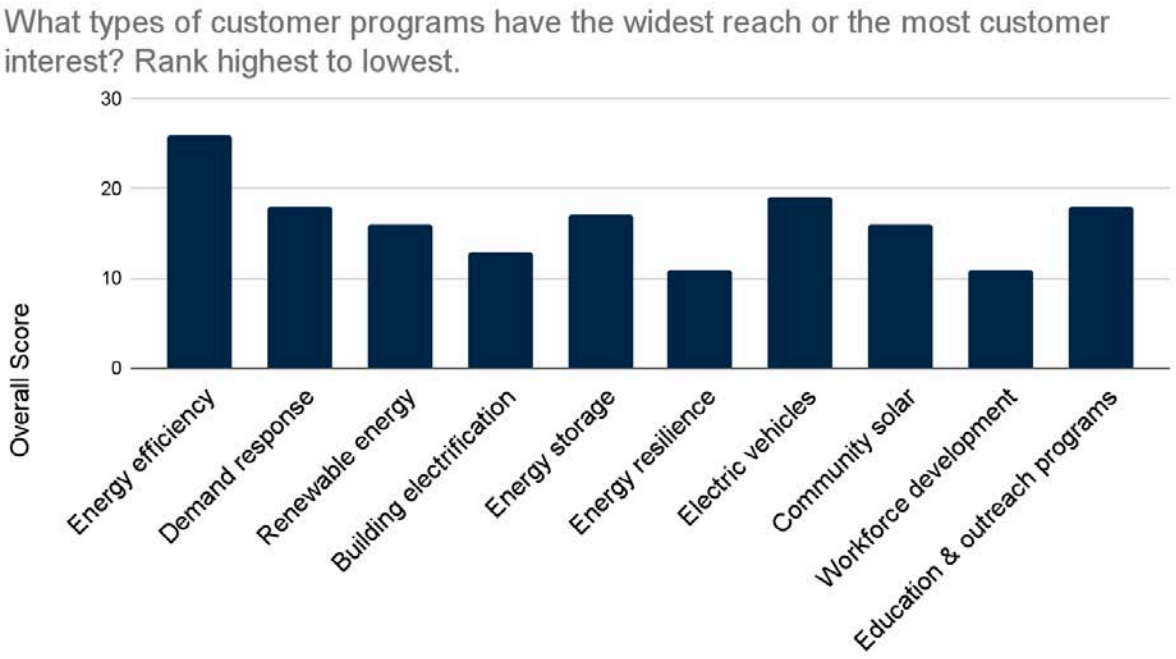
   Themes from Survey Responses on Beneficial Programs
   When asked about CCA or utility customer programs that could be valuable for OCPA, respondents suggested a range of ideas that can be grouped into several common themes:
   - **Energy Efficiency & Load Management:** Strong interest in programs that reduce consumption and shift load, such as weatherization, HVAC upgrades (including AC-to-heat pump replacement), smart water heaters, and critical peak load management.
   - **Renewable Energy & Storage:** Recommendations for incentives or rebates supporting solar, battery storage, and behind-the-meter technologies that increase resilience and lower costs.
   - **Transportation Electrification:** Suggestions included expanding EV charging programs (with optimized charging rates/tiers) and support for electric bikes, including safety and voucher programs that provide equity benefits for low-income customers.
   - **Business & Economic Development Support:** Energy audits and advisor programs were identified as particularly valuable for commercial customers, helping them understand where to invest, save money, or shift load.
   - **Equity & Affordability:** Respondents emphasized the need for programs that directly benefit low-income renters and reduce the cost of affordable housing development, ensuring vulnerable customers also gain from clean energy transitions.
   - **Education & Workforce:** Ideas included academy and school partnerships to align customer programs with workforce development and community engagement.

Customer Programs/ Communications and External Affairs Questions

1. What types of customer programs have the widest reach or the most customer interest? Rank highest to lowest.

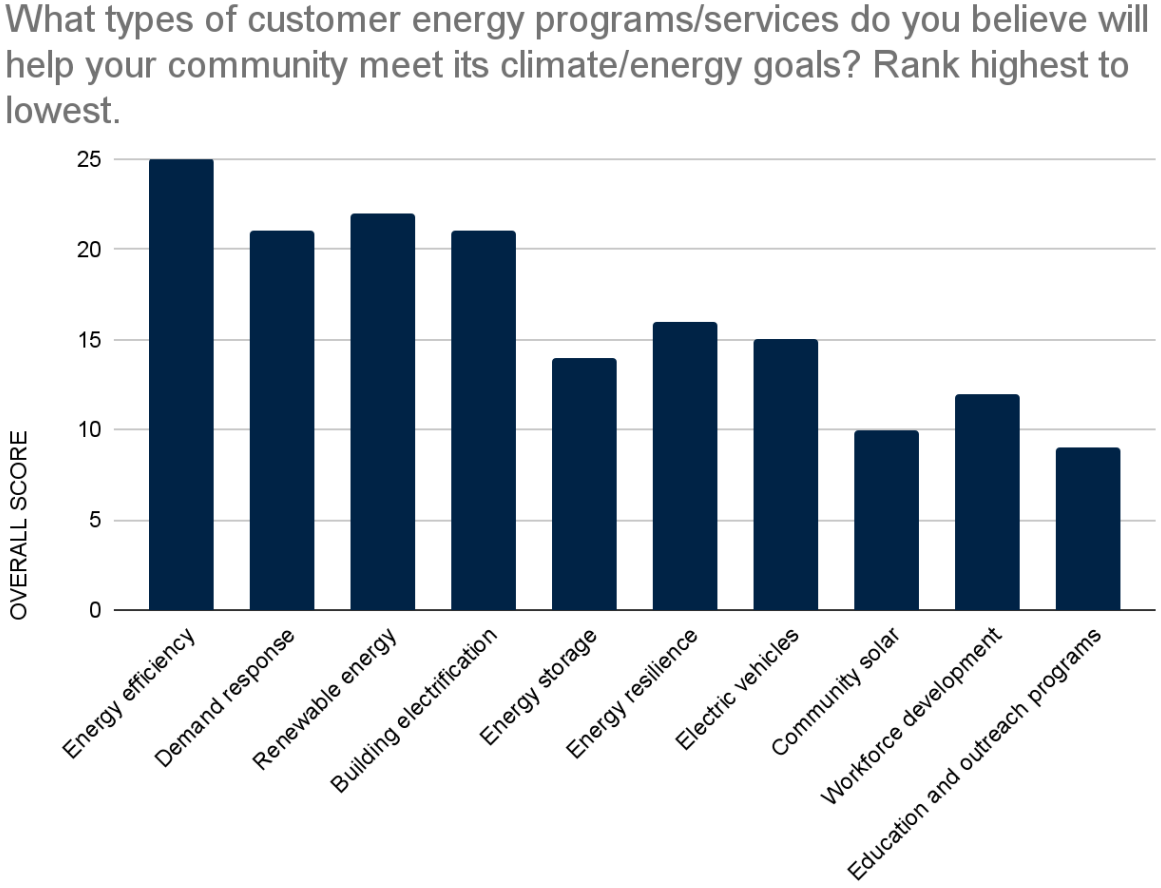
	Score	Ranking
Energy efficiency	26	1
Electric vehicles	19	2
Demand response	18	3

Education and outreach programs	18	3
Energy storage	17	5
Renewable energy	16	6
Community solar	16	6
Building electrification	13	8
Energy resilience	11	9
Workforce development	11	9



2. What types of customer energy programs/services do you believe will help your community meet its climate/energy goals? Rank highest to lowest.

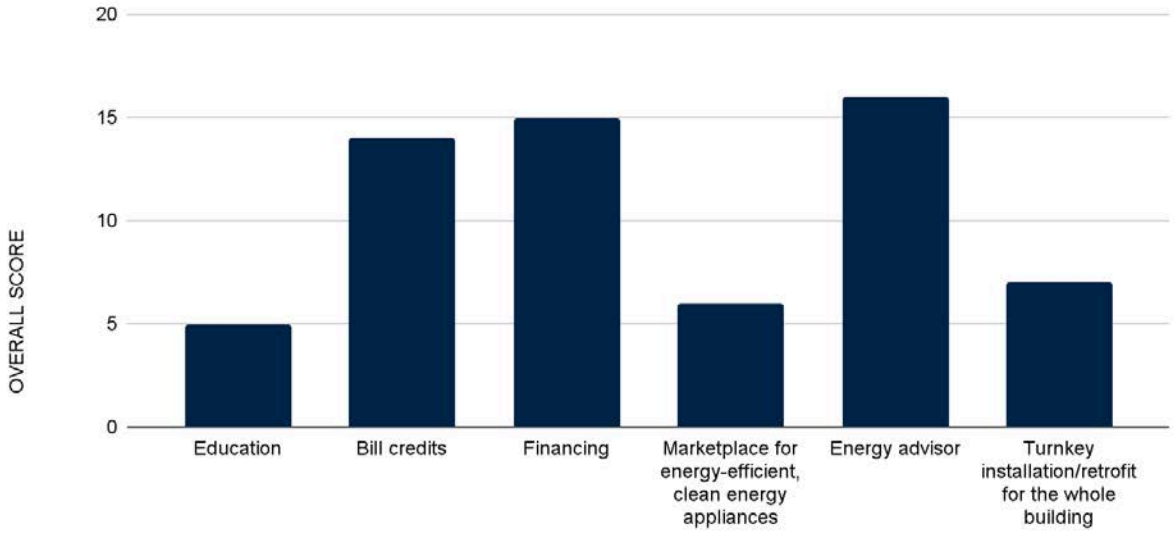
	Score	**Ranking**
Energy efficiency	25	1
Renewable energy	22	2
Demand response	21	3
Building electrification	21	3
Energy resilience	16	5
Electric vehicles	15	6
Energy storage	14	7
Workforce development	12	8
Community solar	10	9
Education and outreach programs	9	10



3. What types of program services do you think would most benefit OCPA's customers? Rank highest to lowest.

	Score	Ranking
Energy advisor	16	1
Financing	15	2
Bill credits	14	3
Turnkey installation/retrofit for the whole building	7	4
Marketplace for energy-efficient, clean energy appliances	6	5
Education	5	6

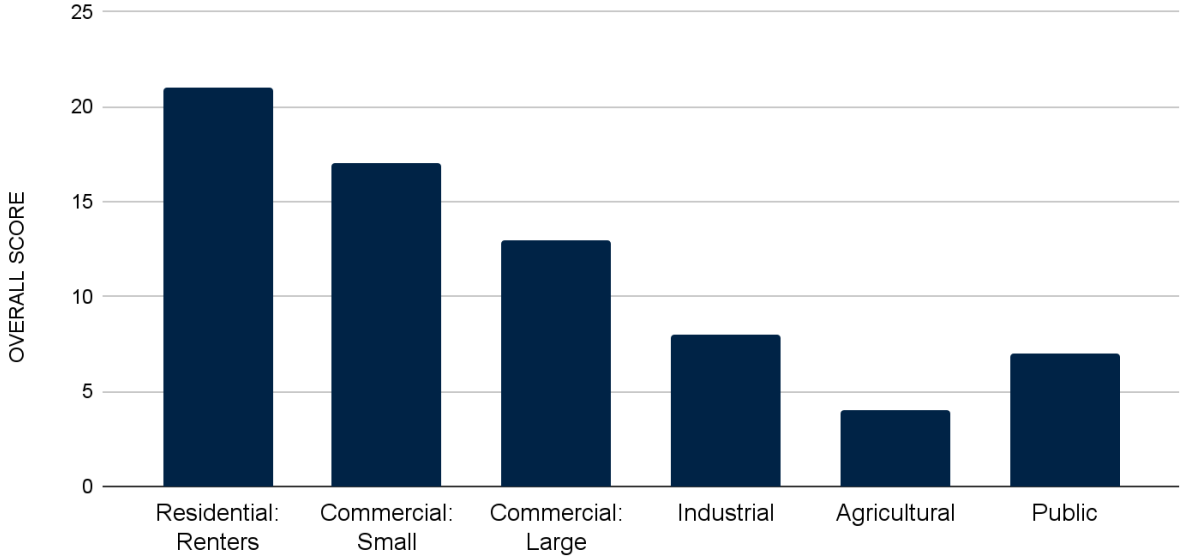
What types of program services do you think would most benefit OCPA's customers? Rank highest to lowest.



4. Which customer groups do you consider to be the most underserved in terms of access to energy services or support? Rank highest to lowest.

	Score	Ranking
Residential: Renters	21	1
Commercial: Small	17	2
Residential: Homeowners	14	3
Commercial: Large	13	4
Industrial	8	5
Public	7	6
Agricultural	4	7

Which customer groups do you consider to be the most underserved in terms of access to energy services or support? Rank highest to lowest.



5. Other Considerations (if any)_____

Themes from Survey Responses on Customer Programs and Communications

- **Affordability First:** Cost remains the top driver of customer interest. Programs that are affordable while also addressing pollution and GHG impacts have the widest reach.
- **Equity & Access:** Many programs (e.g., EVs, renewable energy, storage) are seen as impactful but often inaccessible to renters. Given the high renter population in member cities, equity considerations are critical.
- **Reliability & Resilience:** While not yet a priority for customers, reliability is expected to grow in importance. Energy efficiency and demand response were noted as key tools to support reliability over time.
- **Electrification Priorities:** Building and transportation electrification are aligned with city climate action plans and are consistently top priorities for municipalities.
- **Flexibility & Local Relevance:** Programs that provide cities with a menu of options (e.g., Energized Communities) allow for tailored approaches and broader engagement.
- **Engagement-Oriented Programs:** Even if they don't drive immediate GHG reductions, programs like e-bike initiatives or portable induction cooktop giveaways are highly effective for outreach, visibility, and engaging diverse customer segments.

Power Resources Questions

1. What are the main goals of the Power Resources department in regards to OCPA's customer energy programs? Rank in order of highest priority to lowest.

	Score	Ranking
Meeting regulations	3	1
Power procurement cost savings etc)	2	2
Reliability	1	3

2. What types of customer programs would support those goals? Rank in order of highest impact to lowest.

	Score	Ranking
Energy efficiency: residential	5	1
Solar + Storage: commercial	4	2
Electrification: commercial	3	3
Solar + Storage: residential	3	3
Demand response: commercial	2	5
Electrification: residential	2	5
Demand response: residential	1	7
Energy efficiency: commercial	1	7

3. What types of customer programs can reduce OCPA's use of GHG-emission intensive energy resources? Rank in order of highest impact to lowest.

	Score	Ranking
Energy efficiency: commercial	8	1
Solar + Storage: commercial	7	2
Energy efficiency: residential	6	3
Electrification: commercial	4	5
Electrification: residential	3	6
Demand response: commercial	2	7
Demand response: residential	1	8

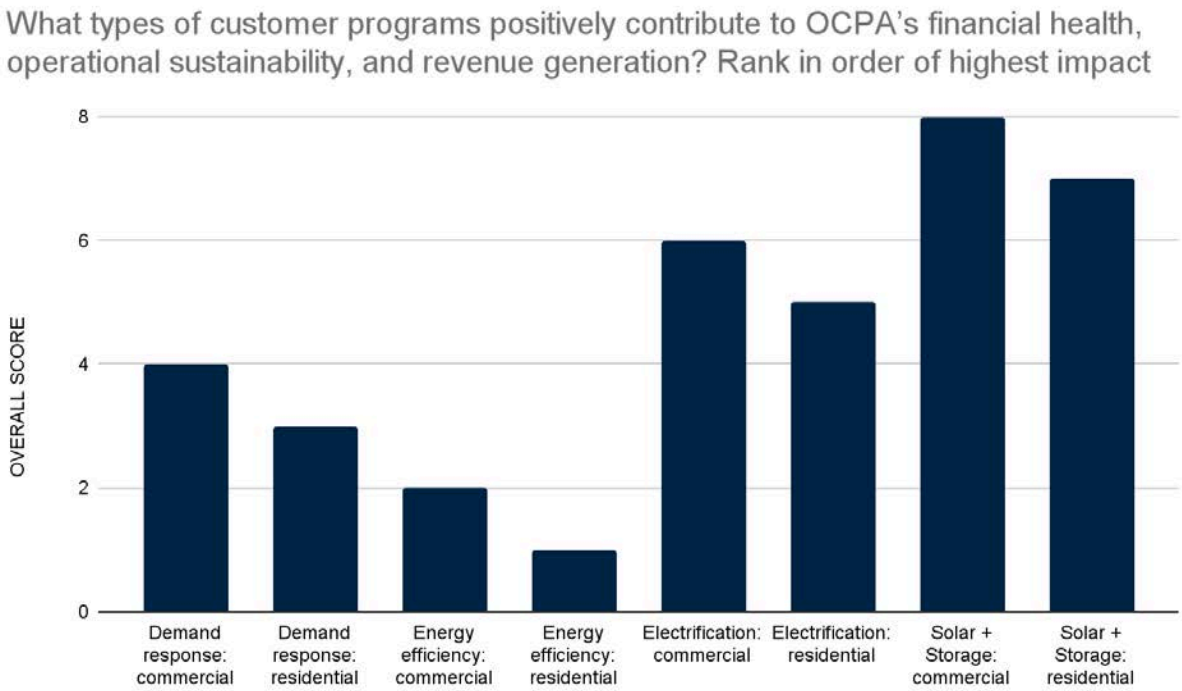
4. Other Considerations (if any)_____

None

FinTech Questions

1. What types of customer programs positively contribute to OCPA's financial health, operational sustainability, and revenue generation? Rank in order of highest impact to lowest.

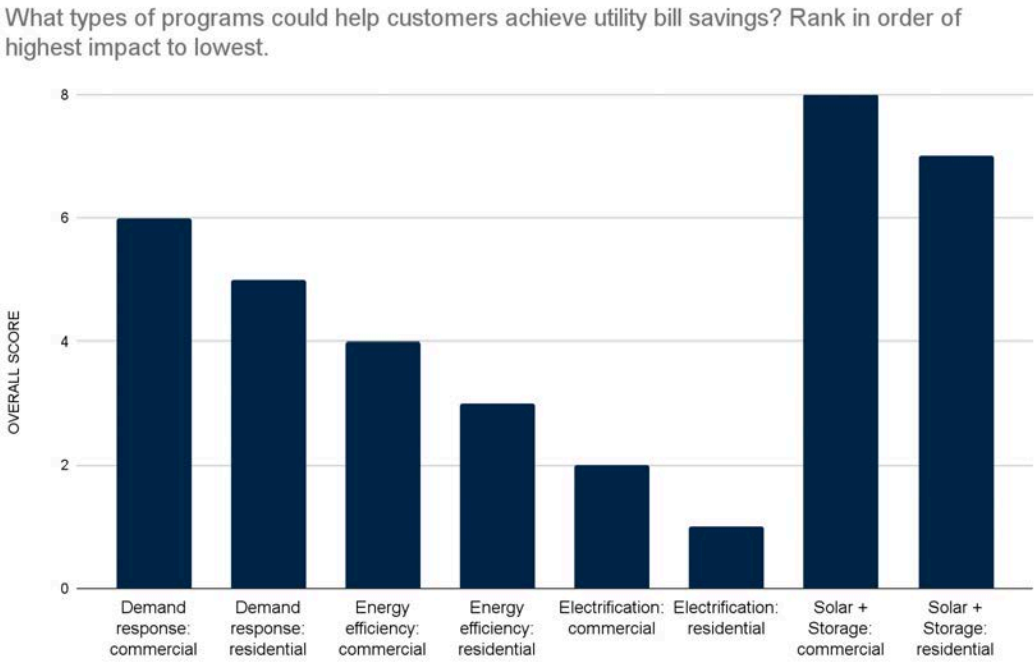
	Score	Ranking
Solar + Storage: commercial	8	1
Solar + Storage: residential	7	2
Electrification: commercial	6	3
Electrification: residential	5	4
Demand response: commercial	4	5
Demand response: residential	3	6
Energy efficiency: commercial	2	7
Energy efficiency: residential	1	8



2. What types of programs could help customers achieve utility bill savings? Rank in order of highest impact to lowest.

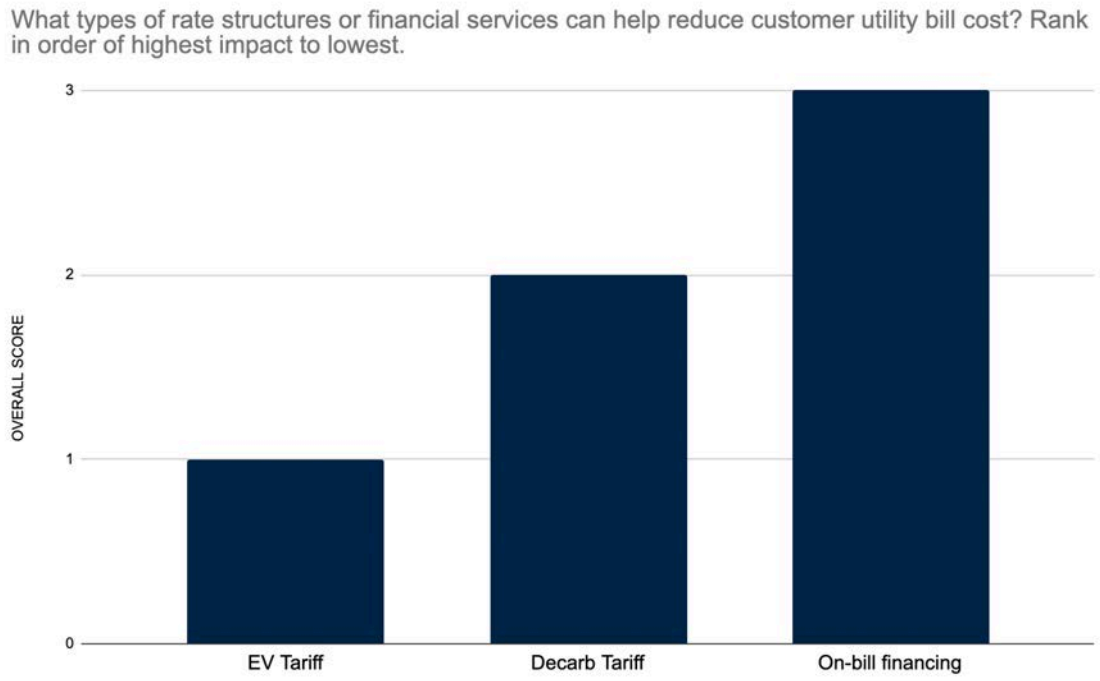
	Score	Ranking
Solar + Storage: commercial	8	1

Solar + Storage: residential	7	2
Electrification: commercial	2	7
Electrification: residential	1	8
Demand response: commercial	6	3
Demand response: residential	5	4
Energy efficiency: commercial	4	5
Energy efficiency: residential	3	6



3. What types of rate structures or financial services can help reduce customer utility bill cost? Rank in order of highest impact to lowest.

	Score	**Ranking**
EV Tariff	1	3
Decarb Tariff	2	2
On-bill financing	3	1



4. Other Considerations (if any)_____

None

Regulatory and Legislative Questions

1. Are there customer programs with uncertainty/risks due to impending regulatory or legislative changes?

Demand Response/Load Flexibility (CEC, legislature, and CAISO), EV Charging (Safety regulations, bi-directional ability), ETA/ATA Funding, several changes to funding/tax rebates/etc.

2. Are there potential new customer programs emerging due to regulatory or legislative changes?

Headed towards flexible load requirements on LSE's (dynamic rates and/or Demand response programs).

3. Other Considerations (if any)_____

None

Appendix I. Communities of Concern Definition

COMMUNITIES OF CONCERN DEFINITION

OCPA has adopted the CPUC's "underserved" methodology, as outlined in Pub. Util. Code Sections 1600 - 1640, enacted by Assembly Bill 841 (Stats. 2020, Ch. 372), for defining communities of concern. Please refer to the tables below for all applicable criteria.

Underserved Community Criteria

Underserved communities must meet one of the following:	
Criteria	Description
Is a "disadvantaged community" as defined by subdivision (g) of Section 75005 of the Public Resources Code.	A community with a median household income less than 80% of the statewide average. "Severely disadvantaged community" means a community with a median household income less than 60% of the statewide average.
Is included within the definition of "low-income communities" as defined by paragraph (2) of subdivision (d) of Section 39713 of Health and Safety Code.	"Low-income communities" are census tracts with median household incomes at or below 80 percent of the statewide median income or with median household incomes at or below the threshold designated as low income by the Department of Housing and Community Development's list of state income limits adopted pursuant to Section 50093.
CalEnviroScreen 4.0 Disadvantaged Community	Is within an area identified as among the most disadvantaged 25 percent in the state according to the California Environmental Protection Agency and based on the most recent California Communities Environmental Health Screening Tool, also known as CalEnviroScreen.
>= 75% free and reduced-price meals	Is a community in which at least 75 percent of public school students in the project area are eligible to receive free or reduced-price meals under the National School Lunch Program.
Tribal lands	Is a community located on lands belonging to a federally recognized California Indian tribe.
Underserved Business Group as defined by Government Code Section 12100.63(h)(2)	Includes women, minority, and veteran-owned businesses or businesses in low-wealth, rural, and disaster-impacted communities included in a state or federal emergency declaration or proclamation

Underserved Customer Criteria

Sector	Description
Residential and public sectors	An underserved customer is a member of an underserved community, as defined by Pub. Util. Code Section 1601(e).
Commercial, industrial and agricultural sectors	Customer must be a member of an underserved community as defined by Pub. Util. Code Section 1601(e), and must also be an underserved business group as defined by Government Code Section 12100.63(h)(2) to be considered an underserved customer.

Appendix J. OCPA Member Operational Alignment Survey Analysis

OCPA MEMBER OPERATIONAL ALIGNMENT SURVEY ANALYSIS

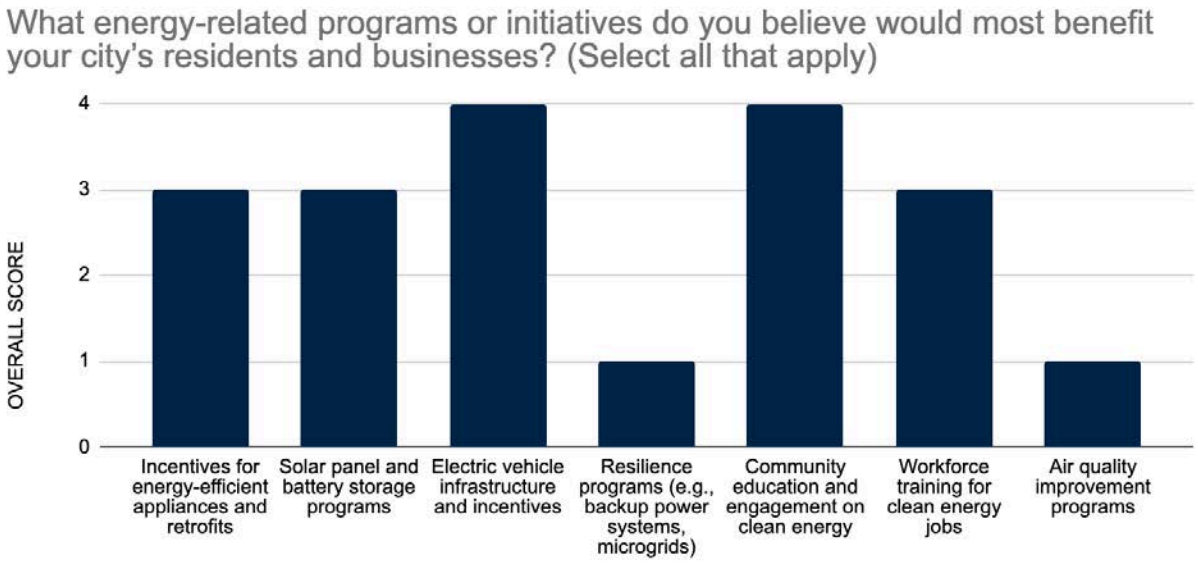
Survey Participation

Total Participants	5
OCPA departments that received 1+ survey response(s)	100%

Key Findings

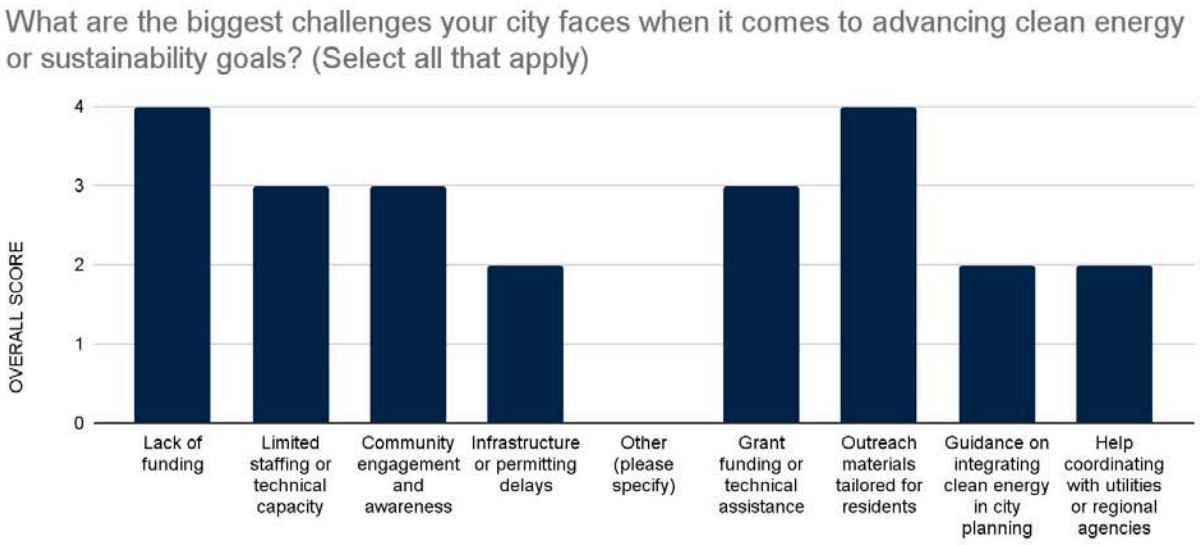
1. What energy-related programs or initiatives do you believe would most benefit your city's residents and businesses? (Select all that apply)

	Score	Ranking
Electric vehicle infrastructure and incentives	4	1
Community education and engagement on clean energy	4	1
Incentives for energy-efficient appliances and retrofits	3	3
Solar panel and battery storage programs	3	3
Workforce training for clean energy jobs	3	3
Resilience programs (e.g., backup power systems, microgrids)	1	6
Air quality improvement programs	1	6



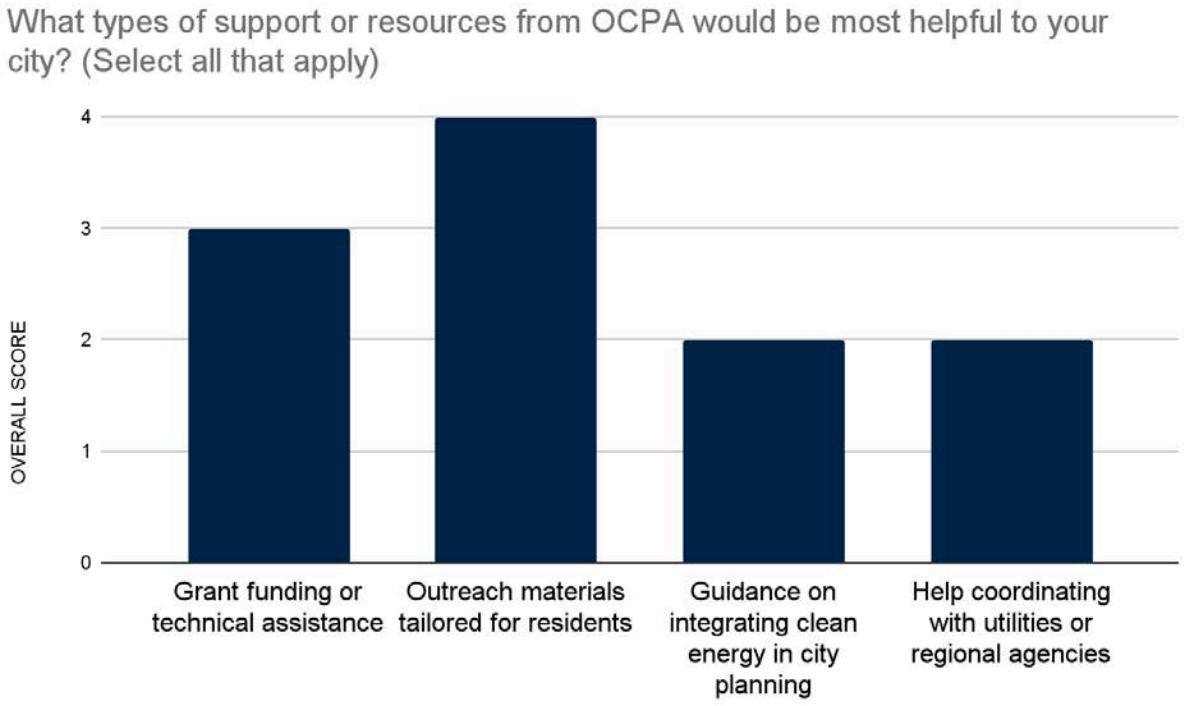
2. What are the biggest challenges your city faces when it comes to advancing clean energy or sustainability goals? (Select all that apply)

	Score	Ranking
Lack of funding	4	1
Outreach materials tailored for residents	4	1
Limited staffing or technical capacity	3	2
Community engagement and awareness	3	2
Grant funding or technical assistance	3	2
Guidance on integrating clean energy in city planning	2	3
Help coordinating with utilities or regional agencies	2	3
Infrastructure or permitting delays	2	4
Other (please specify)		



3. What types of support or resources from OCPA would be most helpful to your city? (Select all that apply)

	Score	Ranking
Outreach materials tailored for residents	4	1
Grant funding or technical assistance	3	2
Guidance on integrating clean energy in city planning	2	3
Help coordinating with utilities or regional agencies	2	3



4. Are there any upcoming city projects or priorities where OCPA could partner or support energy-related efforts?
   Themes from Survey Responses on Potential City Partnerships
   When asked about upcoming city projects or priorities where OCPA could partner or support energy-related efforts, respondents highlighted several key themes:
   - **Community Awareness & Outreach:** A continued priority is increasing public awareness of OCPA's benefits and role in the community.
   - **Energy Efficiency Upgrades:** Cities are considering upgrades to public facilities, including lighting retrofits (e.g., sports courts and fields) and other efficiency measures.
   - **Electric Vehicle Infrastructure:** Expanding EV charging capacity, including upgrading existing stations, was identified as a priority.
   - **Backup Power & Resiliency:** Interest in exploring battery backup and storage solutions to support critical facilities and improve grid reliability.
   - **Clean Energy & Development:** Opportunities exist to integrate renewable energy and green standards into new development and revitalization projects.
   - **Community Solar Access:** Expanding access to solar energy for residents and businesses who cannot install their own systems was noted as a potential area for collaboration.

5. Please share any additional feedback that will help inform OCPA's future programs.

Grants to support home charging and solar would be beneficial for our community.

Appendix K. Existing Programs Matrix Spreadsheet

View the existing programs matrix by clicking the button below.

View Link →

Appendix L. Sources for Program Data

- Streamlined Savings Pathway (SSP) (SCR-PUBL-B4)
  - https://socalren.org/agencies/services/streamlined-savings
  - https://socalren.org/sites/default/files/SCR_2024_Annual%20Report%20Narratives%20and%20Spreadsheets_SoCalREN_CPUC_AR_2024__041525.pdf?_gl=1*xzpn1z*_up*MQ..*_ga*NzY3NzIzMzM5LjE3NTQwODAwNTA.*_ga_XDZJ615GJ2*czE3NTQwODAwNTAkbzEkZzAkdDE3NTQwODAwNTAkajYwJGwwJGgw
  - https://cedars.cpuc.ca.gov/documents/download/3381/mainchange_summary%7Cmain%7Credline)/
- Small HTR Multifamily Direct Install (SCR-RES-A5)
  - https://socalren.org/multifamily/small_multifamily_hard-to_reach_program?_gl=1*15gppzo*_up*MQ..*_ga*MTYwNjQzNTUzNC4xNzU0MDgxMjA0*_ga_XDZJ615GJ2*czE3NTQwODM5NzgkbzIkZzAkdDE3NTQwODM5NzgkajYwJGwwJGgw
  - https://cedars.cpuc.ca.gov/documents/download/3269/mainchange_summary%7Cmain%7Credline)/
- Emergency Load Reduction Program (ELRP)
  - https://elrp.sce.com/
  - https://www.cpuc.ca.gov/industries-and-topics/electrical-energy/electric-costs/demand-response-dr/emergency-load-reduction-program
  - https://www.cpuc.ca.gov/industries-and-topics/electrical-energy/electric-costs/demand-response-dr/emergency-load-reduction-program-data-and-information
  - https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M521/K486/521486520.PDF
- Residential Energy Advisor aka Home Performance+ (SCE_Res_Equity_001 + SCE_Res_Equity_002)
  - https://homeperformanceplusca.com/
  - https://cedars.cpuc.ca.gov/documents/download/3174/mainchange_summary%7Cmain%7Credline)/
- Building Electrification Program
  - https://maromaenergyservices.com/california#2e5b4217-7238-4371-a279-b334ecd6d42c
  - https://goelectric.maromaesa.com/
  - https://urldefense.com/v3/__https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M387/K107/387107687.PDF__;!!NO21cQ!RK4iRqkr42qlWVYMln4E9yQGSQ6zcsOuJNr8dmqQw2AyCll1imAIXVO5dS4y$
- Charge Ready Program
  - https://www.sce.com/business/smart-energy-solar/charge-ready
  - https://www.sce.com/sites/default/files/custom-files/PDF_Files/SCE%20Charge%20Ready%20Program%20Guidelines_NO_CSR_173_final.pdf
- SPARKe Industrial/Ag SEM Program (SCE_3P_SEM_004 & SCE_3P_SEM_004a)
  - https://cedars.cpuc.ca.gov/documents/download/3435/mainchange_summary%7Cmain%7Credline)/
  - https://cedars.cpuc.ca.gov/documents/download/3434/mainchange_summary%7Cmain%7Credline)/
  - https://cascadeenergy.com/Sparke/
- Energy Savings Assistance Whole Home Program
  - https://www.sdge.com/residential/pay-bill/get-payment-bill-assistance/assistance-programs/energy-savings-assistance-whole-home-program#zip
  - https://maromaenergyservices.com/california#ebdc9408-10ec-4380-ace7-382d167b5056
- WE&T Workforce Development Program (IREN-WET-002)

    - https://www.iren.gov/152/Workforce-Education-Training
    - https://cedars.cpuc.ca.gov/documents/download/2989/mainchange_summary%7Cmain%-7Credline)/
- Low Income Weatherization Program (LIWP) Multi-Family
    - https://www.capoc.org/wp-content/energy/utility.html
    - https://www.csd.ca.gov/Pages/Multi-Family-Energy-Efficiency-and-Renewables.aspx
    - https://camultifamilyenergyefficiency.org/
    - https://camultifamilyenergyefficiency.org/wp-content/uploads/2023/09/LIWP-Program-Overview.pdf
    - https://www.csd.ca.gov/Shared%20Documents/LIWP-2022-Multi-Family-2.0-Final-Program-Guidelines.pdf
- Low-Income Home Energy Assistance Program (LIHEAP)
    - https://www.capoc.org/addressing-immediate-needs/
    - https://www.caliheapapply.com/
    - https://www.csd.ca.gov/pages/liheapprogram.aspx
    - https://www.capoc.org/wp-content/uploads/2024/11/LIHEAP-2025-WX-ENGLISH-APPLICATION-combined-2.pdf
- Form 5695 - Residential Clean Energy Credit + Energy Efficient Home Improvement Credit
    - https://www.energy.gov/save/home-upgrades
    - https://www.irs.gov/forms-pubs/about-form-5695
    - https://www.energystar.gov/about/federal-tax-credits
    - https://www.irs.gov/instructions/i5695#:~:text=Qualified%20energy%20property%20is%20any,furnaces%20and%20hot%20water%20boilers.
- High-Efficiency Electric Home Rebate Act (HEEHRA)
    - https://techcleanca.com/incentives/heehrarebates/
    - https://www.energy.ca.gov/programs-and-topics/programs/inflation-reduction-act-residential-energy-rebate-programs
- Distributed Electricity Backup Assests Program (DEBA)
    - https://www.empowerinnovation.net/en/custom/funding/view/42470
    - https://www.energy.ca.gov/programs-and-topics/programs/distributed-electricity-backup-assets-program
    - https://efiling.energy.ca.gov/GetDocument.aspx?tn=252687
    - https://www.energy.ca.gov/solicitations/2023-12/gfo-23-401-bulk-grid-asset-enhancements-grid-reliability
    - https://www.energy.ca.gov/sites/default/files/2024-01/00_GFO-23-401_Att_00_Application_Manual_Addendum_01_ada.docx
- TECH Clean California
    - https://techcleanca.com/
    - https://techcleanca.com/documents/431/TECH-Partner-Flyer-v230307-Digital-1_1.pdf
    - https://www.switchison.org/techcleanca/hpwh-incentives
    - https://techcleanca.com/documents/5515/SGIP_Multifamily_Incentives_for_Unitary__Central_HPWHs_v250114.pdf
    - https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Small-Multifamily-Incentive-Qualifications-for-Heat-Pump-Water-Heaters
    - https://frontierenergy-tech.my.site.com/contractorsupport/s/article/Commercial-HPWH-Projects-Guide
- Clean Truck & Bus Vouchers (Hybrid & Zero-Emission Truck & Bus Voucher Incentive Project - HVIP)

    - https://www.californiahvip.org/
    - https://californiahvip.org/wp-content/uploads/2024/10/FY23-24-HVIP-Implementation-Manual-103124.pdf
    - https://ww2.arb.ca.gov/our-work/programs/low-carbon-transportation-incentives-and-air-quality-improvement-program/funding
    - https://ww2.arb.ca.gov/resources/fact-sheets/clean-truck-and-bus-vouchers-hvip
- Planning & Capacity Building Grants
    - https://www.caclimateinvestments.ca.gov/planning-and-capacity-building-grants
    - https://ww2.arb.ca.gov/our-work/programs/planning-and-capacity-building
    - https://ww2.arb.ca.gov/sites/default/files/2025-07/Draft_Req%20and%20Criteria_FY23-24_Planning_RFA_1.pdf
- Access Clean California
    - https://www.caclimateinvestments.ca.gov/outreach-education-and-awareness
    - https://accesscleanca.org/
    - https://ww2.arb.ca.gov/our-work/programs/access-clean-california/project-background-access-clean-california
    - https://ww2.arb.ca.gov/our-work/programs/low-carbon-transportation-incentives-and-air-quality-improvement-program/low-0
- GO ZERO
    - https://www.aqmd.gov/home/rules-compliance/residential-and-commercial-building-appliances/go-zero
    - https://www.aqmd.gov/home/go-zero-faqs
- Voucher Incentive Program (VIP)
    - https://www.aqmd.gov/home/programs/business/business-detail?title=voucher-incentive-program&parent=vehicle-engine-upgrades
    - https://www.aqmd.gov/docs/default-source/VIP/vip_guidelines90BFCE8BC22B.pdf?sfvrsn=2769e461_69
    - https://www.aqmd.gov/docs/default-source/VIP/vip_application6B39FEC7F3DC.pdf?sfvrsn=443ae561_64
    - https://www.aqmd.gov/docs/default-source/finance-budgets/fy-2025-26/draft-fy-2025-26-budget.pdf?sfvrsn=96659f61_6
    - https://ww2.arb.ca.gov/our-work/programs/carl-moyer-memorial-air-quality-standards-attainment-program/about
- Power Response Home Program
    - https://cleanpoweralliance.org/home/
    - https://www.autogridflexsaver.net/cpa/terms
    - https://cleanpoweralliance.org/homefaq/
    - https://files.cleanpoweralliance.org/uploads/2025/06/Clean-Power-Alliance-Adopts-FY25-26-Budget-Press-Release-6.6.2025.pdf
- Solar and Battery Access Program
    - https://cleanpoweralliance.org/solar-and-battery-access/
    - https://files.cleanpoweralliance.org/uploads/2025/05/wb_CPA_Fact_Sht_EN_24-1.pdf?_gl=1*1xi6om1*_ga*MTMxMTk2MDE3Mi4xNzU0MDg4NDE0*_ga_D7RGXYDZY1*czE3NTQ1MTgxOTkkbzIkZzEkdDE3NTQ1MTk4MzAkajYwJGwwJGgw
- PCE Demand FLEXmarket (PCE01)
    - https://www.peninsulacleanenergy.com/business/rebates-offers-business/flexmarket-program/

    - https://cedars.cpuc.ca.gov/documents/download/3350/mainchange_summary%7Cmain%-7Credline)/
- Electrification Technical Assistance Program
    - https://www.peninsulacleanenergy.com/business/electric-buildings/design-technical-assistance/
    - https://allelectricdesign.org/
    - https://allelectricdesign.org/wp-content/uploads/2020/11/Technical_Assistance_FAQ_2020-11-05.pdf
- Solar Battery Savings Program
    - https://sdcommunitypower.org/programs/solar-battery-savings/
    - https://sdcommunitypower.org/wp-content/uploads/2024/07/Solar-Battery-Savings-Program-Manual_UPDATED.pdf
- Solar Advantage Program aka Disadvantaged Communities Green Tariff (DAC-GT)
    - https://sdcommunitypower.org/solar-advantage/
    - https://www.cpuc.ca.gov/industries-and-topics/electrical-energy/demand-side-management/customer-generation/solar-in-disadvantaged-communities/the-disadvantaged-communities-green-tariff-dac-gt-program
    - https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M504/K172/504172103.PDF
    - https://sdcommunitypower.org/wp-content/uploads/2024/07/FY2025-29-CIP-FINAL-TO-SUBMIT.pdf
- Community Clean Energy Grant Program
    - https://sdcommunitypower.org/community-grant-program/
    - https://www.sdfoundation.org/wp-content/uploads/2025/02/2025-Community-Clean-Energy-Grant-Guidelines-V3.pdf
- Green Workforce Pathways (MCE16)
    - https://mcecleanenergy.org/grow-your-business-expertise/
    - https://aea.us.org/programs/mce-gwp/
    - https://mcecleanenergy.org/green-job-seekers/
    - https://www.energizecareers.org/participate.html
    - https://cedars.cpuc.ca.gov/documents/download/3378/mainchange_summary%7Cmain%-7Credline)/
    - https://cedars.cpuc.ca.gov/documents/download/1668/mainchange_summary%7Cmain%-7Credline)/
- Industrial: Deemed Program (MCE10a), Custom Program (MCE10b), SEM Program (MCE10c)
    - https://mcecleanenergy.org/energy-management/
    - https://cedars.cpuc.ca.gov/documents/download/3328/mainchange_summary%7Cmain%-7Credline)/
- Agricultural: Deemed Program (MCE11a), Custom Program (MCE11b), SEM Program (MCE11c)
    - https://mcecleanenergy.org/energy-management/
    - https://cedars.cpuc.ca.gov/documents/download/3328/mainchange_summary%7Cmain%-7Credline)/
- 3CE New Construction Electrification (ADU)
    - https://3cenergy.org/rebates/new-construction-electrification-program-2/
    - https://3cenergy.org/wp-content/uploads/2022/06/FY-2024-25-Recommended-Budget-Book-book-layout.pdf
    - https://3cenergy.org/rebates/new-construction-electrification-program-2/
- 3CE Ag Electrification Program

    - https://3cenergy.org/rebates/ag-electrification-program-2/
    - https://3cenergy.org/wp-content/uploads/2022/06/FY-2024-25-Recommended-Budget-Book-book-layout.pdf
- 3CE Reach Code Program
    - https://centralcoastreachcodes.org/
    - https://3cenergy.org/wp-content/uploads/2022/06/FY-2024-25-Recommended-Budget-Book-book-layout.pdf
    - http://centralcoastreachcodes.org/wp-content/uploads/2024/10/2024_3CE-Reach-Codes-Slide-Library-Reach-Codes-101.pdf
- Energy Pathways Program (SDRN-01-WET-EPP)
    - https://cedars.cpuc.ca.gov/documents/download/3287/mainchange_summary%7Cmain%-7Credline)/
- Bay Area Multifamily Building Enhancement (BAMBE) (BAYREN02)
    - https://cedars.cpuc.ca.gov/documents/download/3141/mainchange_summary%7Cmain%-7Credline)/
    - https://www.bayren.org/programs-rebates/multifamily-property-owners
    - https://www.bayren.org/multifamily-property-owners/building-improvements
- BayREN Refrigerant Replacement Program (BRRR) (BayREN10)
    - https://cedars.cpuc.ca.gov/documents/download/3222/mainchange_summary%7Cmain%-7Credline)/
    - https://www.bayren.org/chill
- Decarbonization Showcase (BayREN12)
    - https://cedars.cpuc.ca.gov/documents/download/3282/mainchange_summary%7Cmain%-7Credline)/
    - https://www.bayren.org/decarb-showcase OCPA Staff Operational Alignment Survey Analysis
- Equitable Building Decarbonization (EBD) Statewide Direct Install Program
    - https://www.energy.ca.gov/programs-and-topics/programs/equitable-building-decarboniza-tion-program/ebd-statewide-direct
    - https://efiling.energy.ca.gov/GetDocument.aspx?tn=252682&DocumentContentId=87762
- Commercial Energy Efficiency Program (CEEP) (SCE_3P_2020RCI_005)
    - https://cedars.cpuc.ca.gov/documents/download/2829/mainchange_summary%7Cmain%-7Credline)/
    - https://willdanefficiency.com/
    - https://willdanefficiency.com/rebates
- Comprehensive Energy Efficiency Resource Program (CEER) (SCE-24-Non-3P-001-Com)
    - https://cedars.cpuc.ca.gov/documents/download/3309/mainchange_summary%7Cmain%-7Credline)/
- Energy Savings Assistance (SCE-13-ESA)
    - https://www.sce.com/save-money/income-qualified-programs/energy-savings-assis-tance-program
- Multifamily Residential Direct Install Program (SCE_3P_2024R_MF_001)
    - https://cedars.cpuc.ca.gov/documents/download/3464/mainchange_summary%7Cmain%-7Credline)/
    - https://www.synergycompanies.com/utility-program/multi-family-direct-install-program
- Residential Direct Install (SCE-13-SW-001G)
    - https://www.synergycompanies.com/utility-program/sceres
    - https://www.sce.com/es/save-money/savings-programs/enroll-in-savings-programs/residen-

tial-direct-install-program

- Hard-to-Reach Commercial Direct Install (SCR-COM-E5)
  - https://cedars.cpuc.ca.gov/documents/download/3414/mainchange_summary%7Cmain%-7Credline)/
  - https://socalren.org/commercial/hard-to-reach-commercial-direct-install

Appendix M. Sources of Funding Information

SOURCES OF FUNDING INFORMATION

The table below lists the sources of funding information that was used to populate the tracking spreadsheet. This list, along with corresponding links, is included in the first tab of the tracking spreadsheet. Information sources include state and regional agency websites, non-profit aggregator websites, and newsletters that track funding opportunities from multiple sources.

This assessment is designed to identify opportunities beyond those identified in the Existing Programs Assessment. The list was updated with additional sources as they were identified.

Due to recent guidance from the federal administration, many programs initiated through the Bipartisan Infrastructure Law (BIL) and the Inflation Reduction Act (IRA) are no longer active. Some funding that was already provided for state-level implementation is now being repossessed. To improve our understanding of the viability of various federal grant opportunities, we have included the federal grants portal and two websites that track federal funds' status. The risk associated with federal funding is considered in the prioritization and recommendations analysis.

Sources of Funding Information

Category	Description	Agency
California State Agencies		
	CEC Open and Upcoming Solicitations	California Energy Commission (CEC)
	CEC Funding Information	California Energy Commission (CEC)
	CEC Empower Innovation Funding Opportunities	California Energy Commission (CEC)
	SGC Grant Programs	Strategic Growth Council (SGC)
	CSD Funding Programs	CA Dept of Community Services and Development (CSD)
	LCI Funding Opportunities	CA State Governor's Office of Land Use and Climate Innovation (LCI)
	CA Climate Investments Resource Portal	California Air Resources Board (CARB)
	CARB Funding Opportunities	California Air Resources Board (CARB)
	Federal Clean Energy Funding Opportunities	California Public Utilities Commission (CPUC)
	CA Grants Portal	All CA State Agencies
Regional Agencies		
	SCAG Grant Opportunities	Southern California Assocation of Governments (SCAG)
	South Coast AQMD Grants	South Coast Air Quality Management District (AQMD)
	South Coast AQMD Incentives	South Coast Air Quality Management District (AQMD)
	South Coast AQMD Funding	South Coast Air Quality Management District (AQMD)
Funding Aggregators		

Category	Description	Agency
	CCEC wEEkly update	California Climate and Energy Collaborative (CCEC)
	LARC Monthly Climate Funding Newsletter	Los Angeles Regional Collaborative for Climate Action and Sustainability (LARC)
	ARCCA Funding Tracker	Alliance of Regional Collaboratives for Climate Adaptation (ARCCA)
	CA Green Economy Public Funding Tracker	UC Berkeley Labor Center
	EPN funding updates	Environmental Protection Network (EPN)
Federal Agencies		
	Federal Grants Portal - Grants.gov	All Federal agencies
	Water Smart Funding Opportunities	US Bureau of Reclamation (USBR)
Federal Funding Status Updates		
	Federal Energy and Climate Funding Updates and Resources	Compiles (crowd-sources) info across multiple federal agencies
	GO-Biz Federal Funding Tracker for Climate and Energy	The CA Governor's Office of Business and Economic Development (GO-Biz)

Appendix N. Funding Tracking Spreadsheet Template and Data Fields

The tracking spreadsheet template contains column headings (data fields) for key information about each opportunity. As the spreadsheet is populated, some small revisions may be made to these fields to capture the important aspects of the opportunities and facilitate evaluation and prioritization.

View the tracking template and data fields spreadsheet by clicking the button below.

View Link →

Appendix O. Funding Recommendations Memo

FUNDING RECOMMENDATIONS MEMO

This memo summarizes the process and findings of the OCPA Funding Opportunities Assessment.

Process

The funding opportunities assessment was conducted in two phases. In the first phase, TEC identified sources of funding information and created a tracking spreadsheet. Phase 2 of the funding opportunities assessment validated and reviewed the funding sources identified in Phase 1, and populated the tracking spreadsheet (Appendix N. Funding Tracking Spreadsheet Template and Data Fields) with opportunities aligned to the priorities identified in OCPA's Community Needs Assessment.

The primary criteria used to decide what was added to the tracking spreadsheet were:

1. If the opportunity aligned with Community Power Plan priorities (e.g., renter-focused electrification + DR, whole-home EE/electrification, refrigeration efficiency, EVSE/managed charging, SEM, and financing/ incentive stacking)

2. Whether either OCPA or a member agency would be eligible to lead, or the opportunity offers a substantial award (~$500k+) where OCPA or a member agency could be funded as a participating partner.

Other considerations that were originally envisioned included total funding available, competitiveness, application complexity, and risk (including federal policy volatility). However, due to the limited number of current opportunities found, we did not use these criteria to eliminate any open opportunities from inclusion on the spreadsheet.

Findings

Key findings from the funding assessment are as follows:

- Federal volatility has reduced near-term access to funding opportunities from the Bipartisan Infrastructure Law (BIL)/Inflation Reduction Act (IRA). Early 2025 federal actions paused or rescinded portions of IRA/Infrastructure Investment and Jobs Act (IIJA) disbursements. Several high-profile clean energy grants were paused or terminated, including portions of the Greenhouse Gas Reduction Fund. Multiple court orders are underway but uncertainty remains high for many national programs.
- Despite those federal developments, certain IRA funds allocated for residential rebates in California remain active. High-Efficiency Electric Home Rebate Act (HEEHRA) has resumed and is available via TECH Clean California. HOMES, implemented by the California Energy Commission(CEC), is active, but program details are still in development. Note, however, that both programs are listed on the Existing Programs Spreadsheet and were therefore not included as new funding opportunities.
- California state grant programs remain comparatively stable and active.
    - Round 6 of the Transformative Climate Communities (TCC) program is expected to be released

by the Strategic Growth Council (SGC) in Spring 2026, and second rounds of two resilience-related programs are upcoming from the Governor's Office of Land Use and Climate Innovation. Past grants have been in the range of $15-25M, and the community-based, multi-benefit model supports deep, lasting change for awardees. However, few total grants are awarded and the programs are highly competitive. Furthermore, TCC grants are complex and time-consuming applications, although SGC is attempting to make process changes that will reduce the effort required for applications.

  - The Electric Program Investment Charge (EPIC) program is confirmed through Dec 31, 2030. Planning for EPIC 5 (2026–2030) is underway, and future grant funding opportunities (GFOs) will be guided by that plan. Solicitation specifics for 2026+ are not yet known and should be tracked. Many EPIC solicitations are research-focused, often led by universities or by private companies proving new technologies. However, if there are solicitations with a demonstration or deployment orientation, OCPA can be competitive.

- The time from solicitation release to application due date can be short. For example, for currently open solicitations (as of November 3, 2025), applications are due between 3 weeks to a maximum of 3 months away. Many opportunities identified in this process closed during the assessment development process. We recommend reviewing and updating the tracking spreadsheet regularly.
- Some funding opportunities operate on a multiyear or recurring timeline and have not or could not be included on the list. For instance, EPIC funding opportunities for 2026 and beyond aren't known yet as the EPIC investment plan details for 2026-2030 haven't been released. Opportunities like this should be tracked for future consideration.
- In general, there are sufficient funding opportunities to support electrification and clean mobility programs. To clarify how these opportunities align with each CPP-recommended program, please refer to the tracking spreadsheet, which includes a matrix linking each program to the corresponding funding sources and eligible measures.

Appendix P. Cost-Benefit Analysis

COST-BENEFIT ANALYSIS METHODOLOGY

Purpose

The purpose of the Cost-Benefit Analysis (CBA) is to generate program recommendations for the Orange County Power Authority (OCPA) Community Power Plan based on cost-effectiveness and community benefit. The Community Power Plan will then guide the timing and resource allocation of OCPA's program investments. The CBA utilized a scoring tool that integrates the community needs, operational alignment, and existing programs assessments to analyze the impact and feasibility of potential programs.

Process

The CBA was carried out in three sequential phases. The first phase focused on developing the CBA scoring tool, which included establishing scoring category weightings and identifying programs for evaluation. The second phase involved convening a scoring committee of subject-matter experts to apply the tool to the identified programs. The final phase synthesized committee input into an overall analysis to generate program recommendations.

DEVELOPING THE CBA SCORING TOOL

Scoring Category Weightings

To evaluate program impact and feasibility, the team first defined a set of scoring categories. These categories were informed by a review of other community choice aggregator (CCA) community power plans, as well as OCPA's understanding of program design, community benefits, and implementation feasibility (Appendix P-1).

- **Impact Categories**: Customer energy rate reduction, energy use reduction, load shifting, impact on communities of concern, economic impact, air pollutant impact, incremental GHG impact, extreme heat mitigation, electric reliability.
- **Feasibility Categories**: OCPA customer eligibility, uptake of existing programs, program redundancy, OCPA revenue impact, overall investment impact, implementation timeline.

Example Impact Category Evaluation Criteria and Scoring Guidelines

Category	Evaluation Criteria (Scored 1-5)	Scoring Guidelines
Customer Energy Rate	Achieving lower electricity rates for customers by increasing	**Score 5**: Significant rate reduction; clearly documented with strong

Reduction	cost-effective energy generation through the Orange County Power Authority (OCPA). This includes optimizing procurement strategies, leveraging renewable energy sources, and enhancing operational efficiencies to provide more affordable and sustainable energy solutions.	methodology. **Score 4**: Noticeable reduction; well-documented and credibly estimated. **Score 3**: Moderate reduction; some confidence in methodology. **Score 2**: Minimal reduction or highly uncertain estimate. **Score 1**: No measurable reduction or unsupported claim.

To ensure the tool reflected community priorities, survey data from the community needs and operational alignment assessments was used to create normalized weightings for each impact category. Checklist responses were converted into selection percentages, while ranking-scale responses were assigned higher point values for higher rankings. The combined results were then normalized across categories to generate the final weightings (Appendix P-2).

Example Scoring Matrix

Scoring Categories	Community Needs Weighting *(565 member agency respondents)*	Direct-to-Renter Electrification and DR Program for residents and small businesses
Program Type	-	*Demand Response Programs*
Customer Energy Rate Reduction	14.2%	3
Energy Use Reduction	9.3%	3
Load Shifting	8.1%	3
Impact on Communities of Concern	10.4%	5
Economic Impact	13.5%	3
Air Pollutant Impact	14.6%	3
Incremental GHG Impact	6.5%	3
Extreme Heat Mitigation	8.7%	3
Electric Reliability	14.8%	3
IMPACT TOTAL		3.211
OCPA Customer Eligibility	-	4
Uptake of Existing Programs	-	4
Program Redundancy	-	5
OCPA Revenue Impact	-	3
Overall Investment Impact	-	3
Implementation Timeline	-	4
FEASIBILITY TOTAL		23

Program Identification

Next, the team identified programs to be evaluated using the scoring tool. Drawing on the existing programs assessment, 11 programs were selected to address gaps and opportunities in the current landscape: (Appendix P-3)

- Codes and standards / reach codes support
- Sector-specific demand response (DR) programs
- Direct-to-renter electrification and DR Program for residents and small businesses
- Strategic energy management (SEM) for industrial facilities
- Comprehensive energy efficiency and electrification program
- Financing and incentive stacking support
- Increase e-mobility access and advanced EV and charging infrastructure programs
- Workforce education and training (WE&T)
- Resilience, decarbonization Showcase and pilot projects
- Refrigeration efficiency and electrification program
- Credit-boosting equity direct install programs

Each program was then assigned an “uptake of existing programs” score, based on survey data grouped into program types (energy efficiency/electrification, demand response, distributed energy resources, electric vehicles, education/outreach). Percentiles were mapped to uptake scores, which were integrated into the CBA tool (Appendix P-2).

With category weightings and programs defined, the tool was ready for evaluation.

SCORING COMMITTEE EVALUATION

The second phase of the CBA centered on convening a scoring committee of independent experts. A call for participation was distributed through the California Community Choice Association (CalCCA) along with a position description outlining qualifications (Appendix P-4). Six experts from CCAs across the state volunteered, joined by a representative from a non-profit specializing in program implementation, forming a balanced and knowledgeable panel.

Committee members participated in an orientation session to introduce the CBA, explain the scoring methodology, and clarify their role in the OCPA Community Power Plan. Each member was then provided with background materials and an individual scoring sheet (Appendix P-5). All six committee members submitted their evaluations, which formed the dataset for the final phase of analysis.

FINAL CBA ANALYSIS

The final phase of the CBA involved consolidating the scoring committee’s evaluations. Scores from all six members were averaged for each program and category, resulting in a single representative value per program for both impact and feasibility.

To interpret these results, grading scales were developed using the overall mean and standard deviation of scores. This curve-based approach ensured that programs were evaluated relative to the full distribution of committee assessments.

Impact Scale (mean = 2.77, stdev = 0.21):

- **High impact:** ≥ 2.98 (≥ mean + 1σ)
- **Moderate impact:** 2.77 – 2.98 (mean to +1σ)
- **Low impact:** 2.56 – 2.77 (mean –1σ to mean)
- **Minimal impact:** < 2.56 (below mean –1σ)

Feasibility Scale (mean = 20.38, stdev = 1.46):

- **Highly viable:** ≥ 21.84 (≥ mean + 1σ)
- **Moderately viable:** 20.38 – 21.84 (mean to +1σ)
- **Limited viability:** 18.92 – 20.38 (mean –1σ to mean)
- **Not viable:** < 18.92 (below mean –1σ)

Each program was then classified within these impact and feasibility tiers, providing a structured framework for prioritizing OCPA's potential investments under the Community Power Plan (Appendix P-6).

Impact Analysis			
Category	**Evaluation Criteria (Scored 1-5)**	**Scoring Guidelines**	**Notes**
Customer Energy Rate Reduction	Achieving lower electricity rates for customers by increasing cost-effective energy generation through the Orange County Power Authority (OCPA). This includes optimizing procurement strategies, leveraging renewable energy sources, and enhancing operational efficiencies to provide more affordable and sustainable energy solutions.	Score 5: Significant rate reduction; clearly documented with strong methodology. Score 4: Noticeable reduction; well-documented and credibly estimated. Score 3: Moderate reduction; some confidence in methodology. Score 2: Minimal reduction or highly uncertain estimate. Score 1: No measurable reduction or unsupported claim.	
Energy Use Reduction	Implementing strategies and technologies to achieve overall net kWh savings, including efficiency improvements and benefits from electrification. This encompasses upgrading infrastructure, promoting energy-efficient appliances, and encouraging sustainable practices that reduce consumption while supporting the transition to cleaner energy sources.	Score 5: Significant usage reduction; clearly documented with strong methodology. Score 4: Noticeable reduction; well-documented and credibly estimated. Score 3: Moderate reduction; some confidence in methodology. Score 2: Minimal reduction or highly uncertain estimate. Score 1: No measurable reduction or unsupported claim.	
Load Shifting	Enhancing grid reliability and efficiency through demand response programs and advanced energy management systems. This involves shifting energy consumption to off-peak periods using smart grid technologies, time-of-use pricing, and automated demand response solutions to reduce strain on the grid and optimize energy distribution.	Score 5: Major reliability benefit; strong support during many critical hours. Score 4: Noticeable support; helps during several critical hours. Score 3: Moderate support; limited scope or duration of benefit. Score 2: Minimal or unclear support; few critical hours affected. Score 1: No measurable reliability improvement.	
Impact on Communities of Concern	Assessing the extent to which the program benefits disadvantaged or underserved communities by improving energy access, affordability, and sustainability. This includes evaluating the financial impact on equity customer participants, such as out-of-pocket costs, and ensuring that programs are designed to promote inclusivity, reduce energy burdens, and enhance long-term economic and environmental resilience for these communities.	Score 5: Clear, high-impact outcome with data. Score 4: Moderately high with plausible impact. Score 3: Average performance with gaps. Score 2: Below average or unclear. Score 1: No value or not applicable.	
Economic Impact	The extent to which the program contributes to job creation, retention, and workforce development in the clean energy sector. This includes direct, indirect, and induced employment opportunities, with a focus on equitable access to high-quality, well-paying jobs, apprenticeship programs, and workforce training initiatives, particularly for disadvantaged or underrepresented communities.	Score 5: Clear, high-impact outcome with data. Score 4: Moderately high with plausible impact. Score 3: Average performance with gaps. Score 2: Below average or unclear. Score 1: No value or not applicable.	Direct jobs – Employment created by clean energy projects and infrastructure investments. Indirect jobs – Jobs generated in supply chains supporting clean energy industries. Induced jobs – Employment growth resulting from increased economic activity due to clean energy investments. IRA-related metrics
Air Pollutant Impact	The program's effectiveness in reducing harmful air pollutants (e.g., particulate matter, nitrogen oxides, sulfur dioxide, benzene) that negatively affect local air quality and public health, particularly in disadvantaged communities.	Score 5: Major reduction in pollutants; clear, transformative impact. Score 4: Strong reduction; well-documented and supported by data. Score 3: Moderate reduction; benefits evident but mostly estimated. Score 2: Minimal or uncertain reduction; limited verified benefits. Score 1: No measurable impact on air quality.	
Incremental GHG Impact	The program's contribution to reducing greenhouse gas (GHG) emissions, including measurable reductions in carbon dioxide (CO_2), methane (CH_4), and other climate pollutants in alignment with state and federal climate goals.	Score 5: Major GHG reduction; very large, well-documented impact. Score 4: Strong reduction; substantial, clearly demonstrated benefits. Score 3: Moderate reduction; meaningful but smaller-scale impact. Score 2: Minimal reduction or highly uncertain benefits. Score 1: No significant GHG impact.	
Extreme Heat Mitigation	The program's effectiveness in reducing heat-related risks, such as urban heat islands and temperature-related health hazards, through initiatives like cooling centers, high-efficiency HVAC improvements, tree canopy expansion, and reflective infrastructure.	Score 5: Major cooling effect; strong, well-documented evidence of impact. Score 4: Noticeable cooling; credible evidence supports benefits. Score 3: Moderate cooling; limited impact or early-stage concept. Score 2: Minimal or unverified cooling effect. Score 1: No measurable impact on extreme heat.	
Electric Reliability	The program's impact on grid stability, energy resilience, and outage reduction, including enhancements in local energy storage, microgrid deployment, distributed energy resources (DERs), and demand-side management strategies.	Score 5: Significant rate reduction; clearly documented with strong methodology. Score 4: Noticeable reduction; well-documented and credibly estimated. Score 3: Moderate reduction; some confidence in methodology. Score 2: Minimal reduction or highly uncertain estimate. Score 1: No measurable reduction or unsupported claim.	

Feasibility Analysis			
Category	**Evaluation Criteria (Scored 1-5)**	**Quantified Scoring Guidelines**	**Notes**
OCPA Customer Eligibility	The percentage of OCPA customers eligible to participate or directly benefit from the program, with a focus on equitable access, affordability, and program inclusivity for residential, commercial, and industrial ratepayers.	Score 5: Broad eligibility; nearly all customer types included with wide reach. Score 4: Strong eligibility; multiple sectors included with minimal exclusions. Score 3: Moderate eligibility; some limitations in scope or coverage. Score 2: Limited eligibility; narrow reach or niche focus. Score 1: Very limited or unclear eligibility.	
Uptake of Existing Programs	Historical and projected participation rates based on comparable programs, assessing customer engagement, adoption trends, and potential barriers to implementation to ensure program success and scalability.	Score 5: Very likely to achieve strong participation; assumptions are transparent. Score 4: Likely to achieve solid participation—minor uncertainties. Score 3: Potential for participation is plausible but mixed. Score 2: Unconvincing participation outlook—limited or speculative evidence. Score 1: Participation case is not credible— claims are largely aspirational with little connection to comparable experience or concrete plans.	
Program Redundancy	Evaluating whether the proposed program duplicates, overlaps with, or complements existing initiatives, ensuring efficient resource allocation and avoiding unnecessary replication.	Score 5: Entirely unique offering not available from utilities, local governments, or other third-party providers; clearly fills an unmet need. Score 4: Mostly unique with minimal functional overlap and clearly communicated differentiation. Score 3: Some overlap with existing programs but delivers added value or improvements (e.g., accessibility, cost-effectiveness). Score 2: Considerable duplication of existing services with limited added benefit or unclear role for OCPA. Score 1: Substantially redundant with existing programs, creating risk of confusion or inefficiency.	
OCPA Revenue Impact	The projected positive or negative effect on Orange County Power Authority's (OCPA) financial health, long-term operational sustainability, and overall revenue generation. This includes cost-effectiveness, return on investment, and financial risks associated with program implementation.	Score 5: Very likely to generate meaningful net value for OCPA. Score 4: Likely positive for OCPA; risks appear manageable. Score 3: Could be positive, but too many open questions to be confident. Score 2: Unlikely to deliver material net value; high risk of a neutral outcome. Score 1: Likely negative net impact or unjustified claims.	
Overall Investment Impact	The extent to which OCPA's investment attracts, leverages, or complements external funding sources, such as federal and state grants, Regional Energy Networks, Investor-Owned Utilities, or contractors, to maximize financial efficiency and program reach.	Score 5: Diversified, credible external funding with minimal uncertainty. Score 4: Credible indications of outside funding; some uncertainties remain . Score 3: Moderate and plausible but reliant on several assumptions or pending items. Score 2: Weak prospects; mostly aspirational or early-stage; incremental benefit to OCPA funding is limited or unclear. Score 1: Depends primarily on OCPA funds.	
Implementation Timeline	The estimated duration required to develop, launch, and fully operationalize the program, including key milestones, regulatory approvals, and potential obstacles that may impact deployment.	Score 5: Program can be implemented and fully launched within <5 months, including planning, procurement, and enrollment. Score 4: Launch achievable in 5–12 months with well-defined project management milestones. Score 3: 13–18 month timeline with moderate risks or dependencies. Score 2: >18 months required for full launch due to regulatory, funding, or operational constraints. Score 1: No clearly defined timeline or evidence suggests extended delays (>24 months).	Programs will be designated as Near-Term, Medium-Term, and Long Term as noted below: Score of 5 = Near-Term Score of 4 or 3 = Medium-Term Score of 2 or 1 is Long-Term

Appendix P-2

View the OCPA CBA Weightings and Uptake Score Calculations by clicking the button below.

View Link →

OCPA Programs For CBA

1. **Codes and Standards / Reach Codes Support**
    - Why: Helps accelerate regional electrification and efficiency standards by supporting municipalities in policy adoption and enforcement.
    - Successful Models: 3CE Reach Code Program — strong technical support for municipal reach codes; BayREN Code Support — assistance with code adoption and staff training.
    - Action: Provide technical assistance for cities to develop and adopt electrification-focused reach codes, along with training for enforcement staff.
2. **Sector-Specific Demand Response (DR) Programs**
    - Why: Customers consistently find DR programs easy to understand, low-cost to participate in, and tied to predictable incentives. Expanding DR with tailored options for agriculture and industrial sectors addresses their underserved status while supporting grid reliability.
    - Successful Models: SCE ELRP (Emergency Load Reduction Program) — highly effective for commercial and industrial customers; PG&E SmartAC — scalable residential program with simple enrollment. SCE's Critical Peak Pricing, an optional rate that offers a discount on summer electricity rates in exchange for higher prices during CPP event days.
    - Action: Design flexible participation agreements and integrate automated load management for industrial pumps, compressors, and processing systems.
3. **Direct-to-Renter Electrification and DR Program for residents and small businesses**
    - Why: Renters face unique barriers like lack of control over major equipment. Providing portable, plug-and-play solutions empowers them to participate in energy efficiency, DR, and electrification efforts without landlord intervention.
    - Successful Models: BayREN's Multifamily Energy Program — effective outreach for multi-unit dwellings; SMUD's Smart Home Pilot — portable equipment and behavioral engagement strategies.
    - Action: Offer DR integration plus portable induction cooktops, air purifiers, and plug-in heat pump units, combined with app-based engagement and incentives.
4. **Strategic Energy Management (SEM) for Industrial Facilities**
    - Why: Industrial facilities often cannot retrofit critical equipment, but SEM provides operational efficiency without large upfront costs.
    - Successful Models: SCE SPARKe SEM Program — tailored energy planning and training for industrial and agricultural operations; MCE Industrial Energy Efficiency — custom support for process and operational improvements.
    - Action: Launch cohort-based SEM training, with ongoing technical support and benchmarking to drive measurable savings.
5. **Comprehensive Energy Efficiency and Electrification Program**
    - Why: Integrating energy efficiency upgrades with building electrification for both residential and commercial customers provides deeper savings, streamlines participation, and ensures equitable access. By coupling rebates with stackable incentives, the program can overcome cost barriers and accelerate adoption across sectors.

- Successful Models: Peninsula Clean Energy (PCE) — integrated programs combining efficiency and electrification measures; BayREN Home+ — combined incentives for heat pumps, induction, and efficiency upgrades; 3CE New Construction Electrification (ADU) — layered electrification and efficiency incentives for new projects.
- Action: Offer audits, incentives, financing, and application assistance support for residential and commercial customers to implement measures such as lighting, HVAC, refrigeration, heat pumps, and induction appliances. Pair with stackable incentives aligned with TECH Clean California and federal IRA funding to maximize customer benefits and participation.

6. **Financing and Incentive Stacking Support**
   - Why: Even with enhanced incentives, upfront costs are a major barrier for small businesses and income-qualified customers. Financing and technical guidance enable broader participation.
   - Successful Models: MCE On-Bill Financing — accessible repayment models for residential and commercial customers; SoCalREN Revolving Loan Fund — bridges funding gaps for public agencies
   - Action: Provide on-bill financing, low-interest loans, and expert guidance on stacking local, state, and federal incentives.
7. **Increase E-Mobility Access and Advanced EV and Charging Infrastructure Programs**
   - Why: Community members face barriers when converting to e-mobility such as high capital costs or limited charging infrastructure. In addition, CCAs would benefit from smart load management to optimize grid integration.
   - Successful Models: SCE Charge Ready — scalable charging programs for residential and commercial sites; Peninsula Clean Energy EV Ready — turnkey solutions for multi-unit dwellings, small businesses, and fleets. Sonoma Community Power E-Bike program — provide safety courses and rebate on purchase of eligible e-bikes.
   - Action: Expand infrastructure support for workplaces, multifamily units, and fleet operators, integrating smart charging and DR participation. Provide safety courses and equipment for e-bikes and develop a program to offer residents either rebates for the purchase of e-bikes or discounted e-bike rentals. Offer diverse solutions for residents and businesses including e-bikes and e-family/cargo bikes.
8. **Workforce Education and Training (WE&T)**
   - Why: Building a skilled workforce ensures that electrification, DR, and SEM programs can scale effectively while creating equitable job opportunities.
   - Successful Models: I-REN Workforce Development Program — contractor training and certifications; MCE Green Workforce Pathways — connecting local residents to clean energy careers.
   - Action: Partner with community colleges, trade organizations, and unions to create training pipelines in electrification, HVAC, and energy management.
9. **Resilience, Decarbonization Showcase and Pilot Projects**

- Why: Visible, local demonstrations build trust, generate data, and accelerate adoption across sectors.
- Successful Models: BayREN Decarbonization Showcase — municipal and public agency demonstration sites; 3CE Community Resiliency Projects — solar + storage showcases for resilience.
- Action: Develop high-profile demonstration projects, such as all-electric municipal facilities, microgrids, industrial/agricultural electrification, or school retrofits, with robust community engagement.

10. Refrigeration Efficiency and Electrification Program

- Why: Refrigeration systems are significant energy users in grocery stores, restaurants, and other small-to-medium commercial facilities. Upgrading to high-efficiency or electrified refrigeration systems reduces energy costs, supports decarbonization, and improves grid reliability during peak load periods.
- Successful Models: BayREN Refrigerant Replacement Program (BRRR) — targeted upgrades and refrigerant retrofits; PG&E's Advanced Refrigeration Program — incentives and technical support for high-efficiency refrigeration equipment.
- Action: Provide audits, incentives, and direct install options for efficient compressors, advanced controls, and natural refrigerant systems, coupled with maintenance training and support for low-GWP refrigerant conversions.

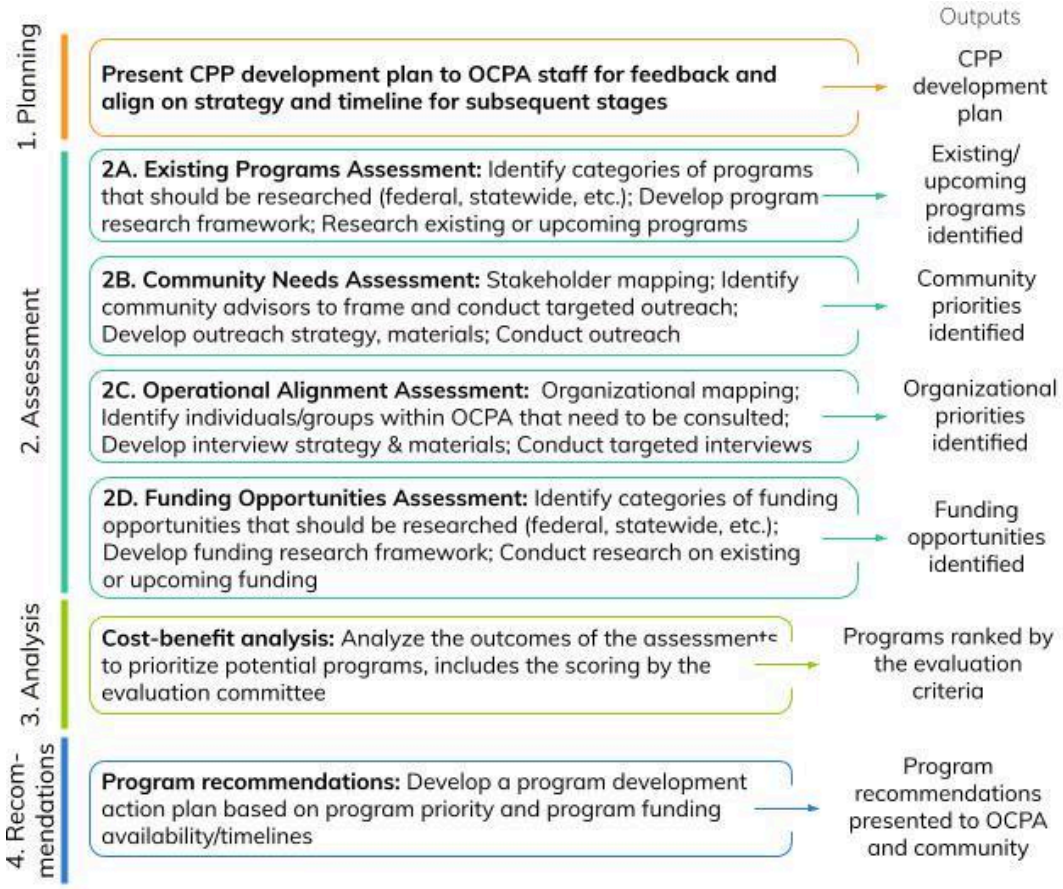
11. Credit-Boosting Equity Direct Install Program

- Why: Equity communities often face barriers to financing due to lower average credit scores. This program would partner with a local credit union to deposit incentives into an account that automatically repays a matching loan. Participants would not need to make payments themselves, but the on-time repayment history would still be reported to credit bureaus, helping participants build credit while accessing energy efficiency or electrification upgrades.
- Successful Models: There are currently no direct models of incentive-backed automatic repayment loans tied to credit building. Comparable structures include on-bill financing programs (e.g., SCE On-Bill Financing), which allow customers to repay upgrade costs through their utility bill. However, those programs do not contribute to credit score improvements because they are not reported to credit bureaus.
- Action: Collaborate with local credit unions to design a pilot where incentive funds are deposited and automatically applied to loan repayments, ensuring positive credit reporting. At the end of the loan term, participants emerge with both the benefits of energy upgrades and improved credit standing, expanding future financial opportunities.

OCPA Program Scoring Committee Job Description

Overview

Orange County Power Authority (OCPA) is developing a Community Power Plan to identify local energy needs and create a program development roadmap. As part of the evaluation process, OCPA will include industry experts on a Program Scoring Committee to help evaluate potential programs. As illustrated in the schematic below, this committee will play a vital role in evaluating and scoring programs that have been internally identified and shortlisted through the Community Needs Assessment (including listening sessions and surveys), Operational Alignment Assessment (including evaluation of OCPA's internal capacity and strategic alignment), Funding Opportunities Assessment (including identification of public and private funding sources), and the Existing Programs Assessment (including industry research) process.



Committee members will use a standardized and quantified scoring framework to assess each shortlisted program's impact potential, feasibility, and alignment with OCPA's strategic priorities, including equity, decarbonization, and ratepayer value. Impact potential captures the breadth and depth of a program's expected benefits—such as incremental greenhouse gas impact, air

pollutant impact, energy use reduction, economic impact, and impact on communities of concern. Feasibility considers how realistically and efficiently a program can be implemented, taking into account factors like overall investment impact, OCPA revenue impact, OCPA customer eligibility, uptake of existing programs, and implementation timeline. Together, these dimensions help ensure that the highest-scoring programs are both meaningful in their outcomes and achievable in practice.

The CBA framework will generate a prioritization for each program—ranging from 'High Priority' to 'Not Recommended'—based on scoring committee inputs. These results will guide OCPA in understanding which programs to invest in, when to do so, and how to allocate resources based on cost-effectiveness and community benefit.

Responsibilities

Evaluate Programs Selected by OCPA Staff

- Review a curated set of programs that have been prioritized through based on existing programs and score their impact on identified priorities.

Apply a Quantified Scoring Rubric

- Use a defined scoring framework with specific thresholds to assign numerical scores (1–5) across multiple evaluation criteria such as customer eligibility, GHG reduction, community impact, implementation timeline, and economic viability.

Attend Calibration Session

- Participate in onboarding and a scoring calibration workshop to ensure shared understanding of scoring criteria, guidelines, and procedures.

Submit Individual Scoring

- Complete scoring for each program and provide short written justifications for selected criteria to support transparency and consistency.

Provide Feedback on the Process

- Contribute input on the clarity, fairness, and usability of the scoring rubric for future iterations.

Qualifications & Experience

Ideal candidates should possess:

Experience in one or more of the following areas:

- Clean energy programs (e.g., energy efficiency, electrification, DERs)
    - Local government, public-sector planning, or program implementation or evaluation
    - Environmental justice or community-based outreach and equity frameworks
    - Utility operations, rate design, or regulatory compliance
    - Data analysis or cost-benefit modeling
- Familiarity with Community Choice Aggregation (CCA) or local energy programs is preferred but not required.
- Experience using structured evaluation tools or frameworks to assess proposals or initiatives.
- Commitment to equity, sustainability, and transparent public decision-making.

Tangible Work Outputs

Each member will:

- Review and score 5-10 proposed programs.
- Assign numeric scores (1–5) across 14 evaluation categories per program.
- Submit a completed scoring template, including brief notes or justifications for selected scores.

Estimated Time Commitment

Total Time Commitment: 4-6 hours

- Orientation: 30 mins
- Program review and scoring: 3-5 hours

Scoring Timeline:

- OCPA anticipates conducting a single scoring cycle during the third quarter of 2025.

Orange County Power Authority

Community Power Plan: Programs Cost-Benefit Analysis - Scoring Committee

9/16/2025

Agenda

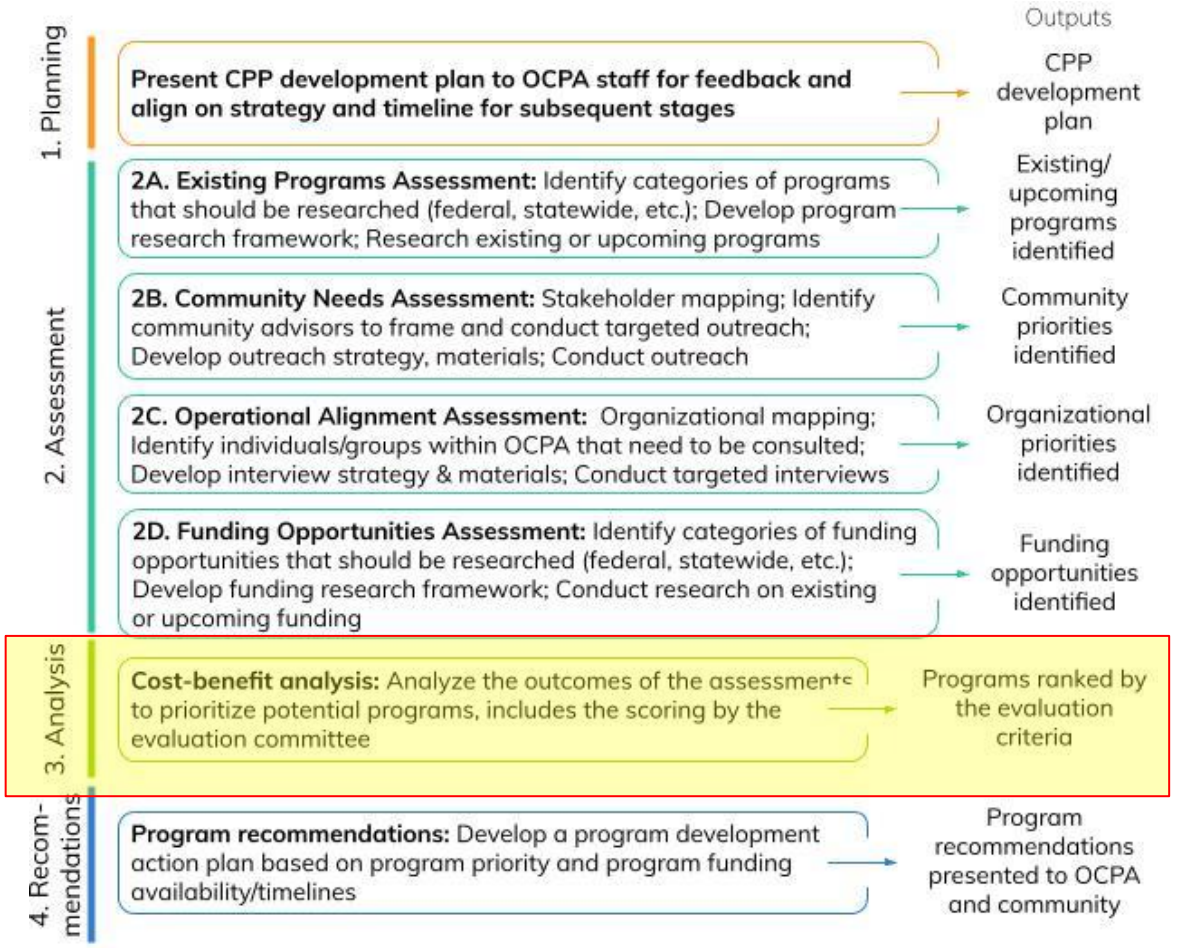
- Background
- Cost-Benefit Analysis Orientation
  - Part 1:
    - Programs, Scoring Categories, and Criteria
  - Part 2:
    - Scoring Logic, Getting to Final Priority
- Next Steps

Background

Community Power Plan

Orange County Power Authority is developing a Community Power Plan (CPP) to identify local energy needs and create a program development roadmap.

The CPP will contain the following steps:



Cost-Benefit Analysis (CBA)

- The goal of the CBA is to determine the **impact** and **feasibility** of potential programs to produce a final prioritization

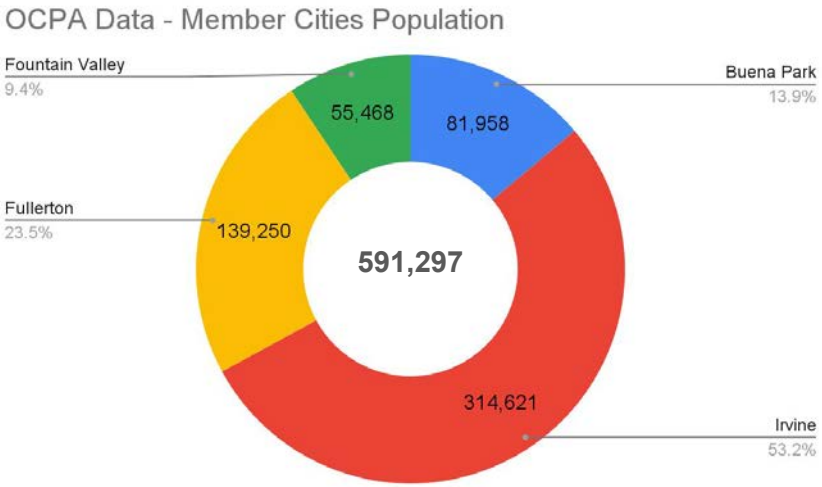
- The results from the CBA will be incorporated into the overall program recommendations to guide OCPA in understanding which programs to invest in, when to do so, & how to allocate resources based on cost effectiveness and community benefit

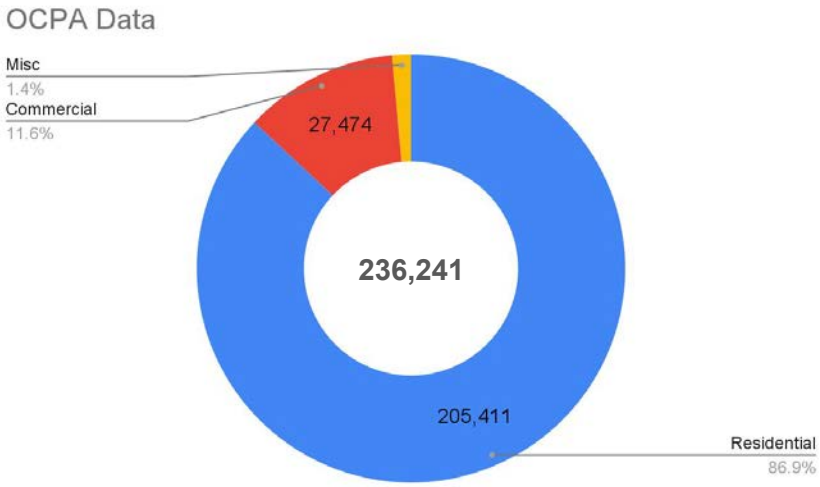
Scoring Committee Responsibilities

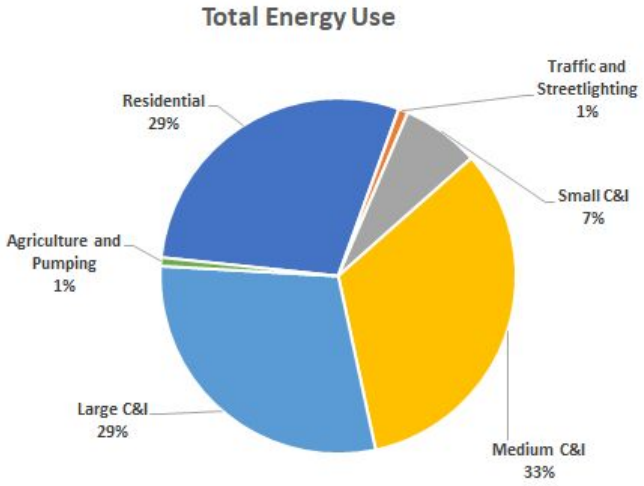
- Review and score 10 (+1) programs (est. 3-5hrs)
  - Use a defined scoring framework with specific thresholds to assign numerical scores (1–5) across multiple evaluation criteria
- Complete scoring for each program and provide short written justifications for selected criteria to support transparency and consistency.
- Feedback: Contribute input on the clarity, fairness, and usability of the scoring rubric for future iterations.

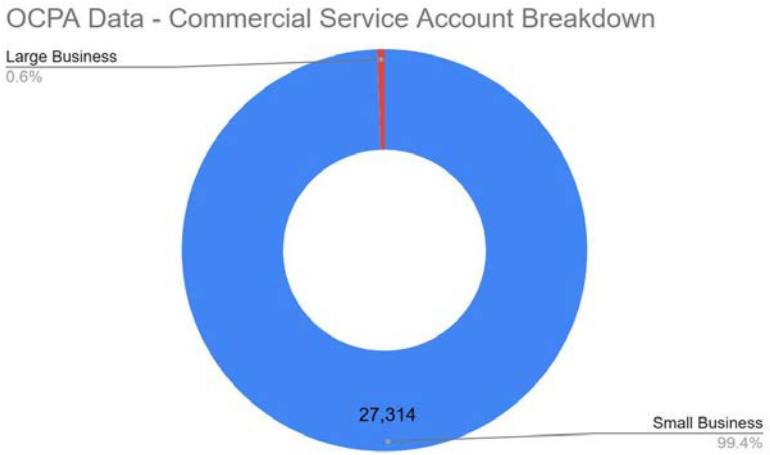
OCPA Customer Overview

OCPA Customer Demographics

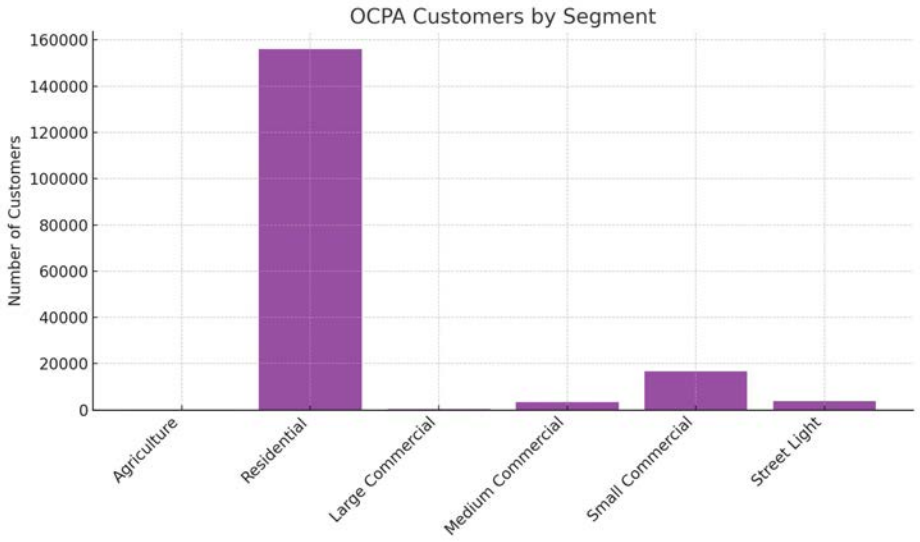


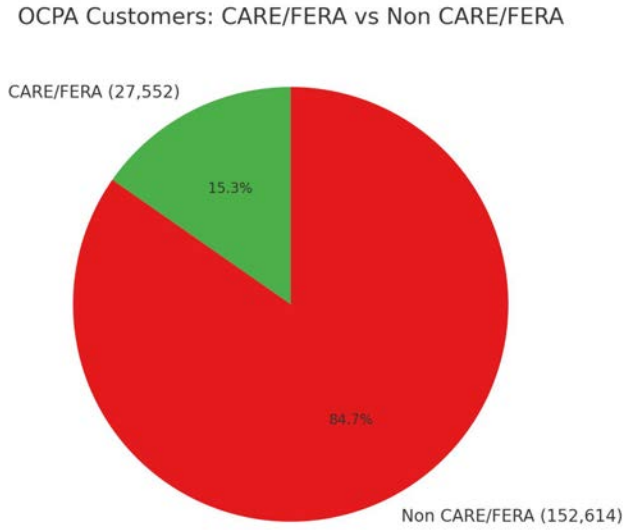






OCPA Customer Demographics





Cost Benefit Analysis Orientation

PART 1: Programs, Categories, and Criteria

1: Programs to be Evaluated

1. Codes and Standards / Reach Codes Support
2. Sector-Specific Demand Response (DR) Programs
3. Direct-to-Renter Electrification and DR Program for residents and small businesses
4. Strategic Energy Management (SEM) for Industrial Facilities
5. Comprehensive Energy Efficiency and Electrification Program
6. Financing and Incentive Stacking Support
7. Increase E-Mobility Access and Advanced EV and Charging Infrastructure Programs
8. Workforce Education and Training (WE&T)
9. Resilience, Decarbonization Showcase and Pilot Projects
10. Refrigeration Efficiency and Electrification Program
11. Credit-Boosting Equity Direct Install Program

2: Scoring Categories & Evaluation Criteria

IMPACT

1. Customer Energy Rate Reduction
2. Energy Use Reduction
3. Load Shifting
4. Impact on Communities of Concern
5. Economic Impact
6. Air Pollutant Impact
7. Incremental GHG Impact
8. Extreme Heat Mitigation
9. Electric Reliability

FEASIBILITY

1. OCPA Customer Eligibility
2. Uptake of Existing Programs*
3. Program Redundancy
4. OCPA Revenue Impact
5. Overall Investment Impact
6. Implementation Timeline

2: Scoring Categories & Evaluation Criteria

- Found on 'Rubric' Tab Columns A & B
- Evaluation Criteria sets the standard by which a category must be judged

Category	Evaluation Criteria (Scored 1-5)
Customer Energy Rate Reduction	Achieving lower electricity rates for customers by increasing cost-effective energy generation through the Orange County Power Authority (OCPA). This includes optimizing procurement strategies, leveraging renewable energy sources, and enhancing operational efficiencies to provide more affordable and sustainable energy solutions.
Energy Use Reduction	Implementing strategies and technologies to achieve overall net energy savings, including efficiency improvements and benefits from electrification. This encompasses upgrading infrastructure, promoting energy-efficient appliances, and encouraging sustainable practices that reduce consumption while supporting the transition to cleaner energy sources.

3: Scoring Guidelines

- Found on 'Rubric' Tab Column C
- Scoring Guidelines: framework that defines criteria and expected levels of performance
  - Committee will use scoring guidelines to provide 1-5 scoring

Category	Evaluation Criteria (Scored 1-5)	Scoring Guidelines
Customer Energy Rate Reduction	Achieving lower electricity rates for customers by increasing cost-effective energy generation through the Orange County Power Authority (OCPA). This includes optimizing procurement strategies, leveraging renewable energy sources, and enhancing operational efficiencies to provide more affordable and sustainable energy solutions.	Score 5: Significant rate reduction; clearly documented with strong methodology. Score 4: Noticeable reduction; well-documented and credibly estimated. Score 3: Moderate reduction; some confidence in methodology. Score 2: Minimal reduction or highly uncertain estimate. Score 1: No measurable reduction or unsupported claim.

PART 2: Scoring Logic, Getting to the Final Priority

Scoring Categories & Evaluation Criteria

PART 2

Appendix P-6

Scoring Categories	Community Weighting	Codes and Standards / Reach Codes Support
Program Type	-	*Educational and Outreach Programs*
Customer Energy Rate Reduction	14.2%	3
Energy Use Reduction	9.3%	5
Load Shifting	8.1%	2
Impact on Communities of Concern	10.4%	4
Economic Impact	13.5%	5
Air Pollutant Impact	14.6%	4
Incremental GHG Impact	6.5%	5
Extreme Heat Mitigation	8.7%	5
Electric Reliability	14.8%	5
IMPACT TOTAL		4.228
IMPACT SCORE	-	***High Impact***
OCPA Customer Eligibility	-	4
Uptake of Existing Programs	-	3
Program Redundancy	-	5
OCPA Revenue Impact	-	5
Overall Investment Impact	-	5
Implementation Timeline	-	5
FEASIBILITY TOTAL		27
FEASIBILITY SCORE	-	***Highly Viable***
FINAL PRIORITY	-	High Priority

Programs to be Evaluated

Scoring Guidelines

Impact & Feasibility Score = Final Priority

1 2 3 4 5

*Uptake score is pre-calculated (will be determined by the survey data only)

4: Scoring Logic

Repeat Steps 2-4 for all categories for each program

Category	Evaluation Criteria (Scored 1-5)	Scoring Guidelines
Customer Energy Rate Reduction	Achieving lower electricity rates for customers by increasing cost-effective energy generation through the Orange County Power Authority (OCPA). This includes optimizing procurement strategies, leveraging renewable energy sources, and enhancing operational efficiencies to provide more affordable and sustainable energy solutions.	Score 5: Significant rate reduction; clearly documented with strong methodology. Score 4: Noticeable reduction; well-documented and credibly estimated. Score 3: Moderate reduction; some confidence in methodology. Score 2: Minimal reduction or highly uncertain estimate. Score 1: No measurable reduction or unsupported claim.

Programs

4.1: Scoring Best Practices

- **Document your rationale** – Take clear notes explaining why you assigned each score for every program type to ensure transparency and consistency.
- **Stay objective** – Evaluate each program type based on the provided criteria, avoiding personal preferences or organizational biases.
- **Prepare to justify outliers** – If your score is significantly higher or lower than the group average, you may be asked to explain your reasoning.
- **Be consistent** – Apply the same standards and level of scrutiny across all program types.
- **Focus on evidence** – When possible, base your scores on data and assessment findings, but also draw on your knowledge & experience rather than assumptions
- **Ask for clarification when needed** – If any scoring criteria are unclear, raise questions during the process to maintain scoring accuracy.

5: Impact & Feasibility Score = Final Priority

Scoring Categories	Community Needs Weighting	Codes and Standards / Reach Codes Support
Program Type	-	*Educational and Outreach Programs*
Customer Energy Rate Reduction	14.2%	3
Energy Use Reduction	9.3%	5
Load Shifting	8.1%	2
Impact on Communities of Concern	10.4%	4
Economic Impact	13.5%	5

	Highly Viable	Moderately Viable	Limited Viability	Not Viable
High Impact	High Priority	High Priority	Medium Priority	Low Priority
Moderate Impact	High Priority	Medium Priority	Low Priority	Not Recommended
Low Impact	Low Priority	Low Priority	Not Recommended	Not Recommended
Minimal Impact	Low Priority	Not Recommended	Not Recommended	Not Recommended

Uptake of Existing Programs	-	3
Program Redundancy	-	5
OCPA Revenue Impact	-	5
Overall Investment Impact	-	5
Implementation Timeline	-	5
FEASIBILITY TOTAL		27
FEASIBILITY SCORE	-	*Highly Viable*
FINAL PRIORITY	-	High Priority

Next Steps

Next Steps

TEC

- Provide *Programs Central Scoring Hub* to each committee member

Scoring Committee:

- Use TEC provided information to score programs and provide brief justifications for chosen scores by 9/25/2025
- Provide feedback about your experience using the CBA tool

Questions?

Appendix P-6

View OCPA's CBA Scoring Committee Spreadsheet by clicking the button below.

View Link →

Appendix Q. Community Needs Assessment Visuals

Figure 1. Residential and Commercial Customer Awareness of Programs

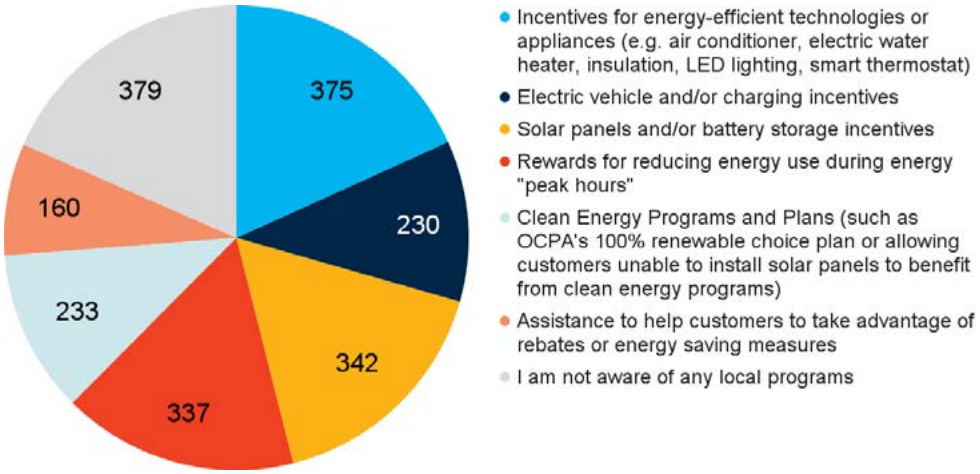


Figure 2. Energy Improvements Made by Residential and Commercial Customers

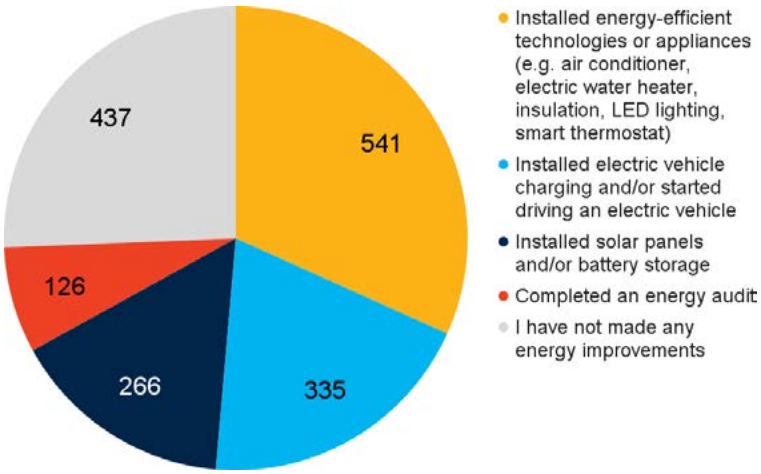


Figure 3. What Electricity Issues are Most Important to Residential and Commercial Customers

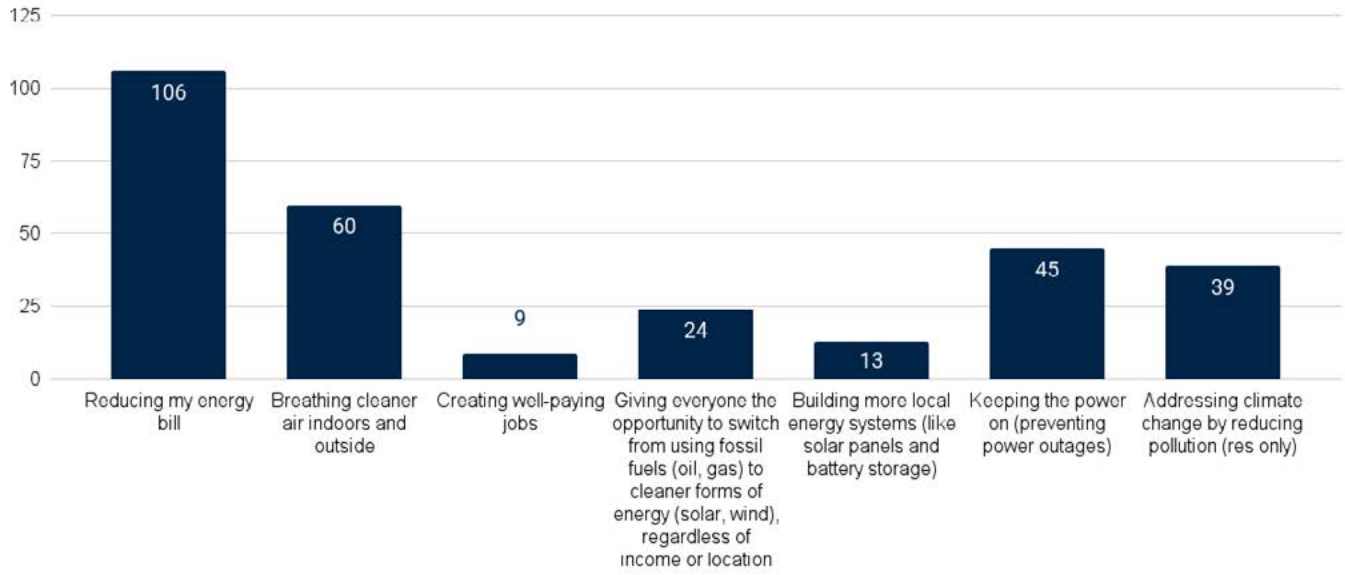
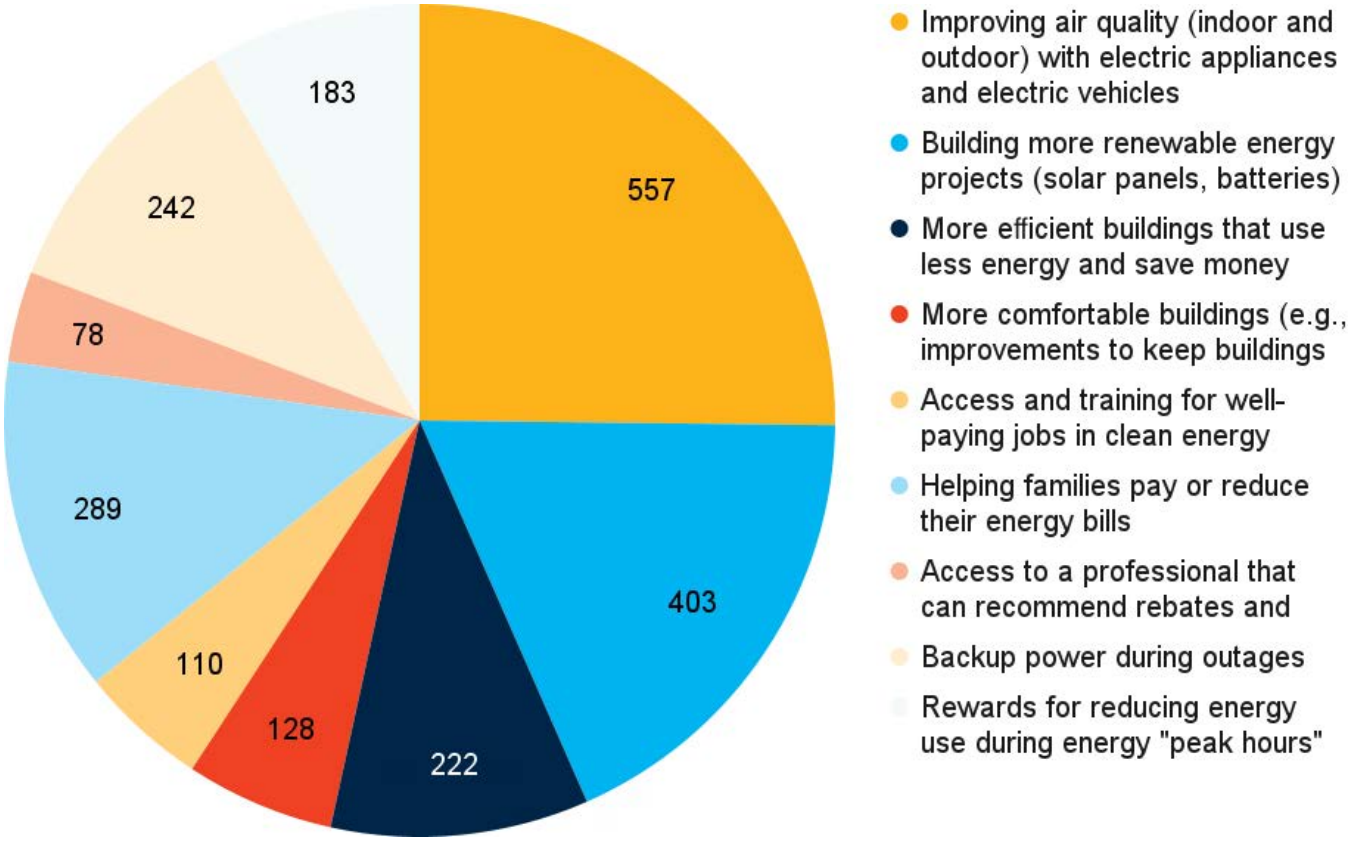


Figure 4. Electricity Related Improvements Residential and Commercial Customers Would Most Like to See



Appendix R. Existing Programs Analysis Visuals

Figure 5. Program Types in Assessment vs. OCPA Customers

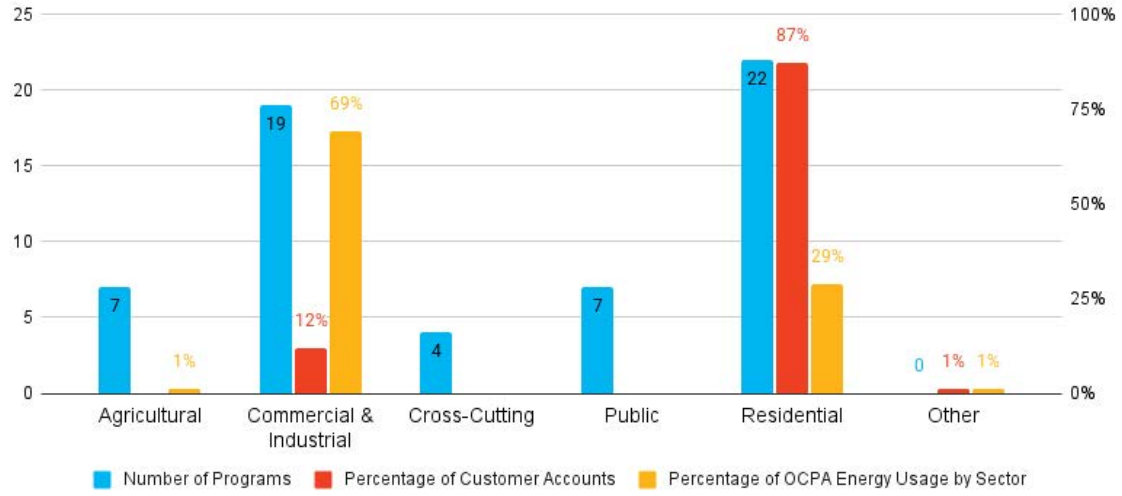


Figure 6. Programs by Type

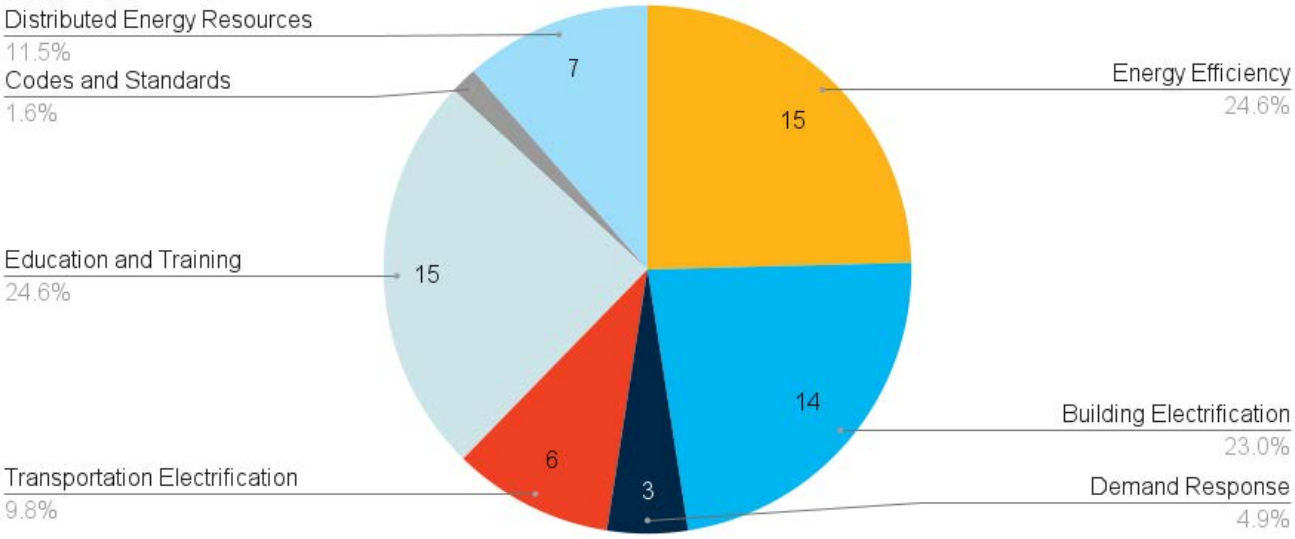


Figure 7. Priority Population Served

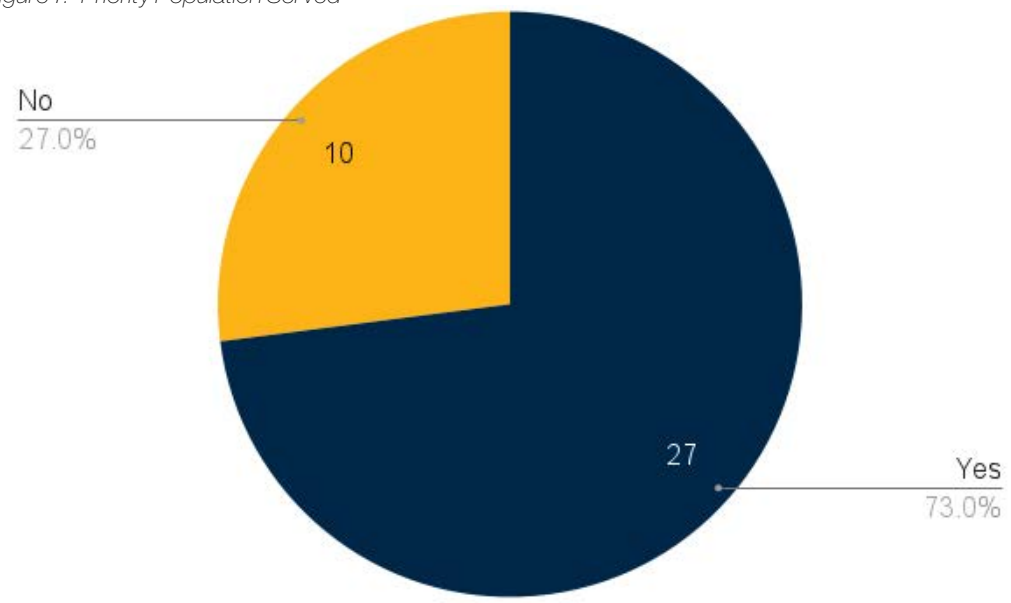


Figure 8. Delivery Methods

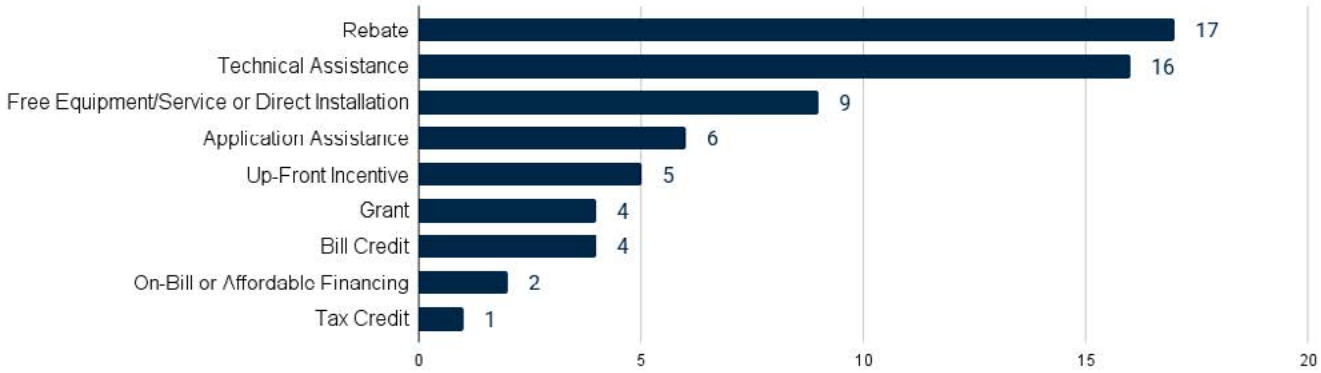


Figure 9. Measures

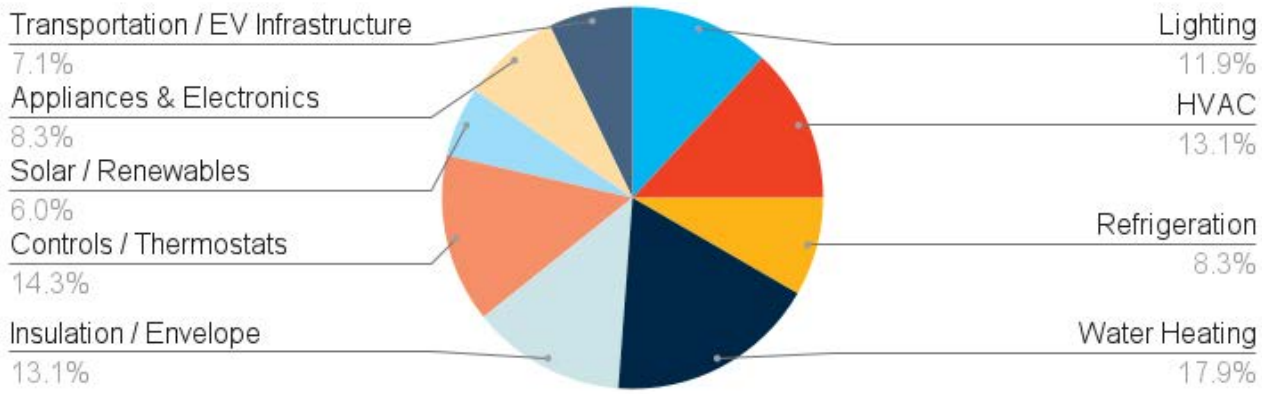
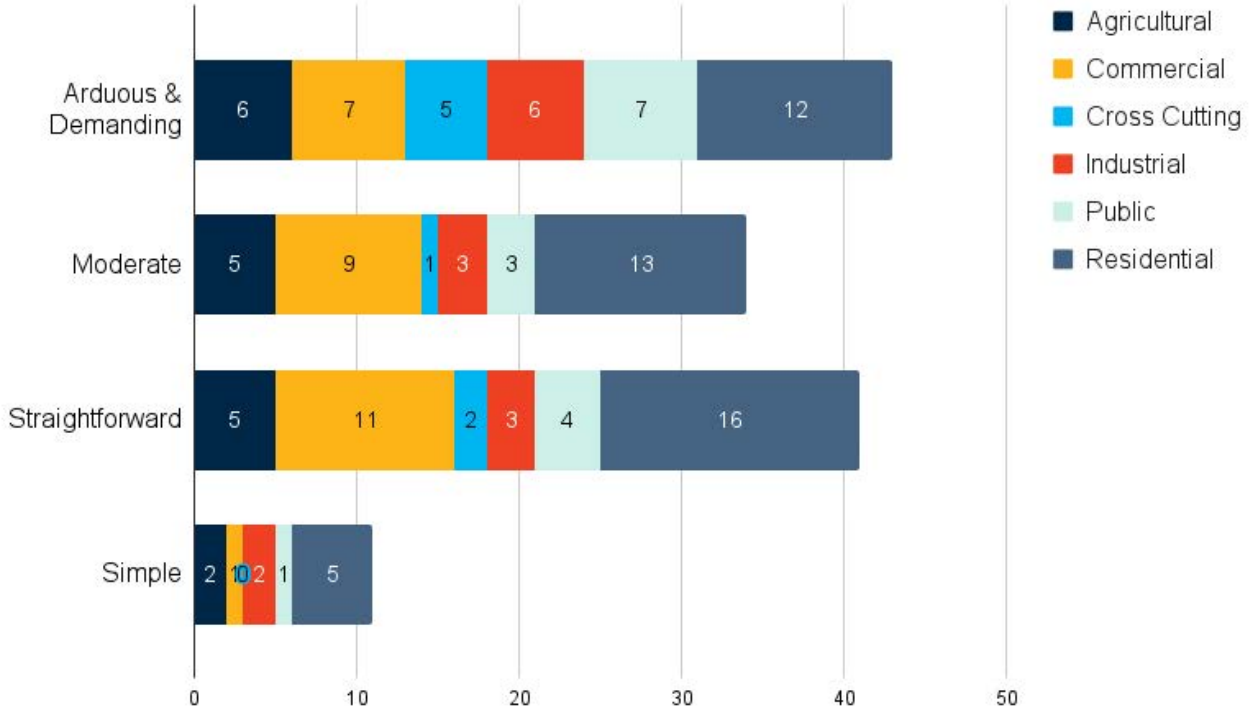


Figure 10.Application Process by Sector



- **Arduous & Demanding** refers to application processes requiring significant documentation, multiple approval steps, and extensive technical or regulatory review.
- **Moderate** indicates processes with a moderate level of documentation and some customized requirements but fewer overall steps than "Arduous & Demanding."
- **Straightforward** describes processes that may require multiple steps but are clear, well-structured, and easy for applicants to follow without confusion.
- **Simple** refers to processes with minimal documentation needs and very few steps, typically standardized forms with limited customization.

Figure 11. Funding Sources for Programs Assessed

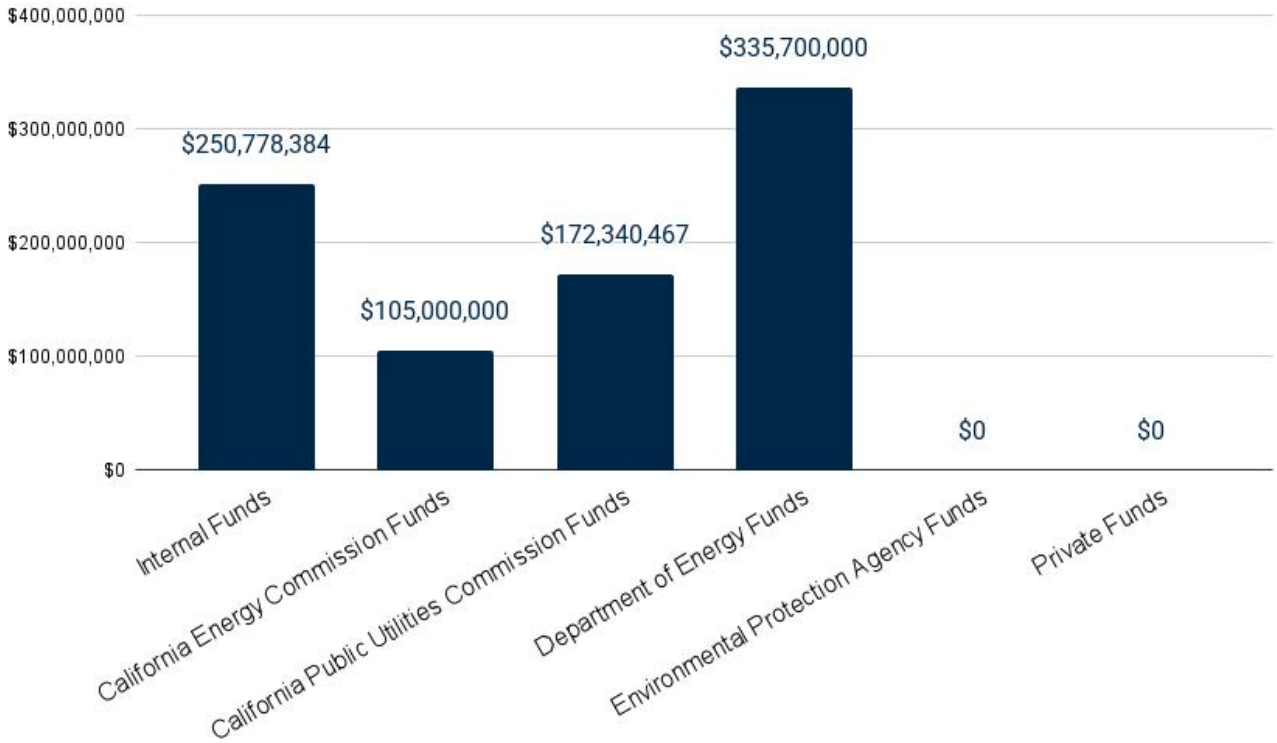


Figure 12. Funding By Sector