

# Clean Energy Access (Phase 2): LA County TECH (CEA-LAT) Grant Application Guidelines

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EQUITY AND ACCESS GRANT PROGRAM

April 3, 2025



**California Public  
Utilities Commission**

Thanks to:

CPUC External Affairs Division – Business and Community Outreach

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# INTRODUCTION

Community-based organizations (CBO) interested in the Equity and Access (E&A) Grant Program should refer to these guidelines and the Resolution approving them prior to applying to this grant.

## E&A Grant Program Vision

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The California Public Utilities Commission (CPUC) is committed to environmental and social justice through its Environmental and Social Justice (ESJ) Action Plan. This commitment includes acknowledging and addressing that some California communities, particularly low-income and communities of color, face structural disadvantages, such as:

- systematic underinvestment;
- higher pollution burdens and exposure to heat, resulting in significant detrimental health impacts; and
- higher barriers to clean, safe, and affordable utility and transportation services.

The E&A Grant Program was initially designed to provide additional support for ESJ communities to participate in CPUC proceedings and decision-making processes, as well as to facilitate access to investments in clean energy resources, transportation, and communication services.

## E&A Grant Program Background

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The E&A Grant Program was initially created with 3 separate grant accounts to implement the Budget Act of 2022 (AB 179) and incorporate its statutory purpose. This included the Clean Energy Access (CEA) Grant Account, which funded awareness and adoption efforts for specific clean energy programs under the auspices of the CPUC. Details about the program appear in Commission Resolution M-4868. Funding for all 3 accounts was fully encumbered via awards and the Budget Act of 2024 (AB 107).

The California Legislature appropriated \$2,000,000 in the Budget Act of 2024 (AB 157) for outreach and education for Los Angeles (LA) County residents from the Aliso Canyon Recovery Account. This is allocated to create a new grant program under the Clean Energy Access (CEA) Grant Account.

The Budget Act of 2024 (AB 157), Section 99 provides:

\$2,000,000 shall be allocated for the Equity and Access Grant Program for community-based organizations to provide education and outreach about building decarbonization, healthy homes, and related health impacts. Organizations located in the Aliso Canyon Disaster Area and the San Fernando Valley shall receive priority for receiving these funds. Additionally, these funds shall support Los Angeles County residents with education about electrification technologies, accessing funds from the Aliso Canyon Recovery Account, and addressing related health impacts. [...]



technology in existing California homes. This pathway aims to directly benefit low-income households and at a broader scale, help California meet its goal of carbon-neutrality by 2045.

The TECH Initiative provides market incentives and workforce education and training to make it easier for distributors and contractors to stock, sell, and install low-emissions heat pump technology for residential replacement projects. Heat pump technologies can reduce household energy burdens, enhance temperature control, and improve resident health by reducing indoor emissions. According to AB 157, Section 99, TECH funding “may also be expended for additional new measures for enabling comprehensive building electrification, including energy audits, panel upgrades, and electrical wiring repairs.”

Per TECH rules, the incentives must be passed 100% from contractors to customers and incentives can be combined with other heat pump incentive programs. In addition to incentives available to all Californians, the TECH Initiative reserves incentives for low- and moderate-income customers only. Altogether, this means Californians can sign agreements with contractors officially approved by the TECH Initiative to replace their existing [water heater](#) and [heating, ventilation, and air conditioning](#) systems with healthier and more efficient alternatives at a reduced cost.

Contractors must first [enroll](#) as a qualified TECH installer. Customers can select a contractor that provides the services and incentives they need using the [TECH Contractor finder](#) tool. After an initial consultation with the contractor, customers must sign the [TECH Customer Terms & Conditions](#). Customers must be enrolled in a [demand response program](#), and will need to complete an income verification application to qualify for equity incentives. Contractors can make a reservation for funds before installation. After installation, contractors can submit a claim for payment. Incentives can be passed along as either an instant discount deducted from the total project cost at the time of customer payment or provided to the customer in the form of a check or other payment method after the contractor receives the incentive.

There are existing challenges to TECH participation, including:

- Contractor-side: knowledge gaps when installing heat pumps in highly varied home setups, lack of awareness of existing training, inadequate resources to access training, language barriers, and complicated rebate processes.
- Customer-side: lack of awareness and trust in technology, high upfront costs, lack of decision-making authority to install heat pumps (for example, for households who rent), language barriers, and complicated rebate processes.

For more information on potential challenges and solutions to TECH program uptake, please look into TECH’s [pilot programs](#), [Quick Start Grants](#), and the TECH [news feed](#).

The TECH Clean California initiative is funded by California taxpayers. The CPUC and CEC set guidelines for fund usage, design, and implementation. Implementation of TECH is led by Energy Solutions ([TECH.info@energy-solution.com](mailto:TECH.info@energy-solution.com)). Energy Solutions partners with Anchor Blue Consulting, Ardenna Energy, Association of Energy Affordability, Building Decarbonization Coalition, Central Coast Energy Services, Inc., Electrify My Home, Frontier Energy, National Comfort Institute, Energy Outlet, Recurve Analytics, The Ortiz Group, Tre’ Laine Associates, and VEIC.

## CEA-LAT Grant Summary

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The CEA-LAT Grant will award up to \$200,000 to CBOs that conduct outreach and education to increase awareness of and facilitate access to the TECH Initiative. At the community level, the grant program is designed to bridge gaps and connect people to these programs, particularly those in underserved areas.

CEA-LAT Grant projects must be in LA County, and priority will be given to organizations located in the Aliso Canyon Disaster Area and/or the San Fernando Valley. Successful applicants for the CEA-LAT Grant will have a demonstrated background in advocating for their chosen target community in these areas.

Eligible activities may include:

- Conducting community education and awareness on building decarbonization, public health, and TECH Incentives for the installation of technologies that qualify for a TECH rebate
- Connect community members to existing workforce development training opportunities
- Evaluating Impact of Strategic Outreach and Education
- Providing community members who choose to participate in the TECH Initiative with ongoing support and education
- Program activities that directly address the challenges listed above for either contractors or customers.
- Direct collaboration with the TECH team at Energy Solutions to connect with the communities that the CBO is in touch with or serves.

For example, funding from the CEA Grant Account could be used to:

- Conduct a workshop on the availability of heat pump incentives to increase installment in the Aliso Canyon Disaster Area communities.
- Train CBO staff to educate communities on sources of indoor/outdoor building air pollution and health benefits of building decarbonization efforts with a focus on TECH.
- Gather feedback from community members on an educational workshop using a survey to improve building decarbonization efforts in underrepresented, low-income households.

Eligible activities are further explained on pages 7-9.

This grant will not pay for infrastructure buildout, such as hardware or equipment, but will rather help facilitate connection between eligible households and communities and the TECH program, with the goal of increasing participation by equity communities (as defined on [TECHcleanca.com](https://www.techcleanca.com)).

Grant applications will be accepted in one or two cycles, depending on the quantity and quality of applications received in the first cycle. Application windows will be set up by CPUC staff. The CEA-LAT Grant Account is competitive.

## CEA-LAT Grant Funding Breakdown

Applicants will be awarded funds from the CEA-LAT Grant Account for eligible activities up to a maximum of \$200,000 per award.

AB 157 (2024): Clean Energy Access (Phase 2): LA County TECH (CEA-LAT) Grant Account Funding Breakdown		
Funding Account	Maximum Grant Award	Total Available in Account
CEA-LAT Grant	\$200,000	\$1,900,000
Program Administration	--	\$100,000
<b>TOTAL</b>	--	<b>\$2,000,000</b>

## CEA-LAT Grant Timeline

The CEA-LAT Grant Account will commence accepting applications in 2025. Applications will be accepted and awarded in one or two cycles, depending on the quantity and quality of the first cycle of applications. Specific dates for cycles will be posted to [the program's webpage](#).

Applications will be scored competitively by the CPUC. Depending on the number of applications, scoring will take 1-2 months. Some adjustments to award amounts, workplans, and/or budgets may be necessary before the award.

Applicants requesting less than \$150,000 can be awarded ministerially by staff. Applicants requesting \$150,000 or more will be approved via a 2–3-month long Resolution process.

Applicants who are awarded a grant will be sent a Grant Agreement which details the terms and conditions of the grant in the last quarter of 2025. The applicant must sign and return the Grant Agreement to the CPUC within one month.

Due to statutory encumbrance dates, all grants must be encumbered before June 30, 2027. Due to statutory liquidation dates and state invoice processing times, **all grant projects must finish before April 1, 2030.**

If future funding becomes available for this program, then the duration of the grant program will be modified accordingly.

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# CEA-LAT Application Overview

CPUC staff will release a Notice of Funding Availability (NOFA) prior to the application window. An application form will be published on the program's designated CPUC website along with application instructions.

As the CEA-LAT Grant will be competitive, applicants will be scored based on the information provided in their application. Applications will be scored and evaluated on a competitive basis in grant cycles.

Information about the application process, including specific deadlines, will be included in the NOFA and updated on the program's webpage.

Following each award cycle, staff may revise the guidelines for subsequent cycles.

## Eligible Entities

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Only California tax-exempt organizations under Section 501(c)(3) of the Internal Revenue Code may apply.

## Non-Eligible Entities

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501(c)3 organizations operated by local governments or operating as fiscal sponsors may **not** apply.

## Eligible Locations

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The Budget Act of 2024 (AB 157) funded the CEA-LAT Grant Account with certain geographical limitations. **Projects must serve Los Angeles County residents only. Priority will be given to organizations located in the Aliso Canyon Disaster Area and San Fernando Valley (ACDA/SFV).**

AB 157 defined the Aliso Canyon Disaster Area as the City of Los Angeles communities of Porter Ranch, Granada Hills, Northridge, Chatsworth, North Hills, Canoga Park, Reseda, Winnetka, West Hills, Van Nuys, and Lake Balboa.

## Examples of Eligible Activities

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CEA-LAT Grant projects are meant to support the goals of the TECH Clean CA Initiative, which aims to accelerate the adoption of heat pump space and water heating across California. CBOs should utilize a CEA-LAT grant to provide outreach and education on TECH Clean CA overall, especially heat pump technology and its health benefits, and make incentives more accessible to those who would like to participate.

CEA-LAT funding is to be used to conduct complementary, non-construction-related activities prior to, during, or after project completion that is **not** directly funded by TECH. Below are examples of activities that can qualify for an award through the CEA-LAT Grant.

The activities listed *within* the categories below are not exhaustive. If an applicant is unsure if an activity is eligible, the applicant may contact the grants team at [capacitygrants@cpuc.ca.gov](mailto:capacitygrants@cpuc.ca.gov). Applicants are expected to establish timelines and specific deliverables as part of their work plan for any activity they propose.

### **Outreach and Education**

Develop a strategy that advances the goals of and creates awareness within the community that the applicant serves about TECH and heat pumps, explaining its benefits, especially health benefits, and encouraging program participation. Create culturally relevant materials and a strategic communications and outreach plan using the channels preferred by the community the applicant serves. The strategic communications and outreach plan should demonstrate cultural relevance, language appropriateness, understanding of what households and communities will need in order to understand the potential of the TECH Initiative, and a clear method for connecting households and communities with TECH Initiative staff. Plan and execute community outreach and education activities, such as workshops and webinars, while coordinating all necessary elements of a successful event, such as flyers, venue, speakers, auxiliary aids, etc.

### **Evaluating Impact of Strategic Outreach and Education**

Setting metrics at the initiation of the grant activities to measure impact and progress during and after activities are complete. Tracking contacts, RSVPs, engagements, and reach of promotional materials or messaging. Preparing and distributing attendance sheets or pre/post grant project event surveys measuring the increase in customer understanding of building decarbonization concepts and technologies. Writing post-event reports summarizing and analyzing community outreach and education events, participant feedback and observed responses, and any issues faced. Following up with event participants to track enrollment or installment and to gather feedback on program participation. Identifying and summarizing successful and unsuccessful outreach and education strategies for future reference by the organization or state. Documenting project impacts and progress against initial metrics and preparing reports for the CPUC, which will be made publicly available.

### **Staff Training**

Members of the CBO can receive training from identified experts to strengthen their ability to carry out outreach and education initiatives. These activities can include learning about TECH's rules; local and statewide environmental and human health impacts of indoor and outdoor air pollution; building decarbonization, healthy homes initiatives, and related health benefits with a focus on TECH; local, state, and federal policies, proceedings, and programs on related topics to extract information important to the communities being served. Staff training should be for the purpose of enriching the main outreach and education component of the grant.

### **Collaboration with Existing Program Implementer**

Coordination necessary with the TECH Initiative implementer or their subcontractors to ensure accurate education and outreach about program rules, heat pumps, and maximum benefits to communities. Please reach out to the current implementer, Energy Solutions, at [TECH.info@energy-solution.com](mailto:TECH.info@energy-solution.com) and CC [capacitygrants@cpuc.ca.gov](mailto:capacitygrants@cpuc.ca.gov) to verify if your planned coordination is feasible beforehand.

### **Program Participant Support**

Provide program support, including initial consultation, contract signing, installation, incentive claims, or other program processes. This could include answering questions, providing guidance on the application process, translating forms and other documents, and offering technical support.

## **Evaluation And Scoring Criteria**

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Grant applications will be evaluated competitively based on the following scoring criteria.

### **Project Narrative (65 Points)**

A well-prepared application narrative will address each of the following:

- Executive Summary
- Organization Background and Qualifications
- Project Need
- Strategic Outreach, Education, and Evaluation Plan
- Quantified Metrics to Evaluate Impact and Progress

See the scoring criteria below for specific information on how to address each section of the project narrative. Each section should be concise and thorough and will pay specific attention to each of the points listed in the scoring criteria.

Project narratives are limited to no more than 15 pages and will account for up to 65/100 points of the evaluations score.

The applicant is responsible for supplying relevant data and concrete examples for the review panel to fully evaluate the application. Citations are required; any citation format is acceptable (APA, numbered references, embedded clickable links, etc).

### **Supporting Documents (35 Points)**

In addition to the project narrative, the following supporting documents will be evaluated:

- Workplan Table
- Budget Table
- Letters of Support (x2)

See the scoring criteria below for specific information on how to address each supporting document.

There are no page limits for supporting documents and they will account for up to 35/100 points of the evaluations score.

### Scoring Criteria

Applicants should refer to the scoring criteria below when developing the project narrative and supporting documents for the CEA-LAT Grant Account Application, as CPUC evaluators will consult the criteria when scoring applicants.

**Cite sources throughout the project narrative.** Any citation format is acceptable (APA, numbered references, embedded clickable links, etc).

SCORING CRITERIA	Points
<b>Project Narrative: Executive Summary</b>	
Clearly define the target community geographically and if applicable, demographically. Offer select high-level demographics of the target community. Briefly describe the elements of the project plan. Briefly describe the desired outcomes of the project, and the reasons why those outcomes will benefit the target community and address their needs in particular.	5
<b>Project Narrative: Organization Background and Qualifications</b>	
<p>Provide a summary of the organization and its ability to fulfill the purposes of this grant.</p> <ul style="list-style-type: none"> <li>A. Provide organization background and primary mission.</li> <li>B. Provide evidence and data on the applying organization’s history of working with and serving the target communities and populations. What insights have you gained about your community that could contribute to the success of this project? Identify local stakeholder relationships that may lead to the project’s success.</li> </ul> <p><i>Outreach and Education Experience</i></p> <ul style="list-style-type: none"> <li>C. Demonstrated experience with planning and implementing community outreach and education programs.</li> </ul>	17
<b>Project Narrative: Project Need</b>	

<p>Identify the problems the project is intended to address. Projects serving the Aliso Canyon Disaster Area or San Fernando Valley will be prioritized.</p> <ol style="list-style-type: none"> <li>A. Define the community or populations of focus.</li> <li>B. Describe the characteristics of that population.</li> <li>C. Link data to need. Specifically identify Environmental Justice issues and use data to highlight the target community's greater need compared to LA County overall or other smaller surrounding areas. What are the unique barriers to building decarbonization and healthy homes in the target community?</li> <li>D. Describe how the applicant's project will benefit the communities or populations that they serve, including immediate and long-term benefits, especially health-related impacts. How will the project address the unique barriers identified above?</li> <li>E. Demonstrate how the proposal aligns with the TECH Initiative, including an explanation of which TECH incentive(s) the target community qualifies for and how the target community meets all eligibility rules for the program.</li> </ol> <p>Data provided could include but is not limited to: ethnicity, higher populations of more vulnerable age groups, median household income, homeownership, comparative uptake of programs, or prevalence of certain health conditions. <i>The following resources may be helpful: <a href="#">CalEPA's CalEnviroScreen tool</a>, <a href="#">US Census Quicksfacts webpage for California data</a>, the <a href="#">TECH Initiative's Heat Pump Data page</a>, <a href="#">TECH Incentives</a>, <a href="#">TECH HPWH Equity Incentives</a>, and the <a href="#">California Department of Finance's webpage for state demographic data</a>.</i></p>	<b>25</b>
<b>Project Narrative: Strategic Outreach, Education, and Evaluation Plan</b>	
<p>Outline your plan for community outreach and education and how you will evaluate success.</p> <ol style="list-style-type: none"> <li>A. Define project goals and objectives. Identify desired outcomes for the targeted community and quantifiable metrics such as deliverables and key dates for your organization's activities.</li> <li>B. Describe your project plan. Describe the full timeline and steps you will take to prepare for, conduct, and follow-up on education, outreach and support activities with your target community members. Ensure that evaluating impact is planned for throughout the duration of your project.</li> <li>C. How will you determine project success and evaluate impact? <ol style="list-style-type: none"> <li>a. What quantitative <b>and</b> qualitative data will you collect before, during, <b>and</b> after outreach and education to show change in your desired outcomes? If no change occurs, what data will you collect to try and figure out why? <ol style="list-style-type: none"> <li>i. For example, number of attendees; surveyed increase in knowledge or interest; percent uptake of promoted programs; compelling stories, quotes or common questions from participants; staff observations.</li> </ol> </li> <li>b. What methods will you use to collect data? Each kind of data mentioned should have a corresponding collection method. <ol style="list-style-type: none"> <li>i. For example, attendance sheets, pre/post workshop knowledge checks, longer term follow up surveys, assigning staff member to observe and record or report on participant feedback during education sessions.</li> </ol> </li> </ol> </li> </ol> <p>Be sure to align your answers to the goals, tasks, metrics, and expected outcomes stated in the Workplan.</p>	<b>23</b>

<b>Supporting Documents: Workplan Table</b>	
The Workplan must detail all activities that will take place within the scope of the applying organization’s project. The Workplan must align with the information presented in the project narrative. Don’t forget to include the data collection and observation needed to evaluate impact. Although there is no required project length, grant projects must be completed by April 1, 2030 to allow time for final invoice processing. See <a href="#">Appendix 1</a> for a sample workplan table.	<b>15</b>
<b>Supporting Documents: Budget Table</b>	
The budget must detail all activity and resource expenses and should amount to the requested grant award. Ensure every task from the Workplan is represented in equal or greater detail in the budget. Note that grantees can receive an upfront payment of 25% of their grant award; the advance will need to be reconciled with expenditure summaries and supporting documentation of actual expenses before subsequent payments are disbursed. See <a href="#">Appendix 2</a> for instructions and <a href="#">Appendix 3</a> for a sample.	<b>15</b>
<b>Supporting Documents: Letters Of Support</b>	
Submit two (2) letters of support from partner organizations or local community leaders that work in or are a part of the communities or populations that the applying organization intends to serve with the CEA-LAT grant funds. Make sure it is clear how the organization or leader serves or is <u>local</u> to the target community. Letters must be written specifically for this grant.	<b>5</b>
<b>Total</b>	<b>100 Points</b>

## Eligible Expenses

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Below are expenses that are eligible for support via a CEA-LAT Grant. Applicants must ensure that proposed expenses are eligible for funding. Expenses deemed ineligible in the application review process will be removed and the project’s recommended total award will be adjusted accordingly.

### Staff

The following are eligible staff expenses:

- Grant recipients, subgrantees, and their contractors’ staff costs, including salary at an hourly rate, benefits, taxes, and leave.
- Staff may be full or part-time employees.
- If applicants wish to use grant funds to pay for interns, fellows, or other positions that are not on an organization’s payroll, these costs should be classified in the budget as a direct cost via a consultant contract.
- If applicants wish to use grant funds to pay for training staff on an organization’s payroll, these costs should be classified in the budget as a direct cost via a consultant contract.

## **Travel**

Travel reimbursements must adhere to the State rates and conditions established on the CalHR website, except for “incidentals” and out-of-state travel, which will not be reimbursable under this grant. Each claimant must complete a form [STD-262A, Travel Expense Claim \(TEC\) Form](#), and follow instructions therein. Expense claims must comply with the travel expense, limitation rules applicable to State of California employees and contractors. An applicant use their own funds to pay for costs above the state-authorized amounts. An electronic copy of STD 262A, instructions, and current applicable information are available at: <https://www.calhr.ca.gov/employees/Pages/travel-reimbursements.aspx>.

## **Administrative**

Costs incurred by the recipient to administer the grant, or costs incurred by subgrantees to perform the tasks necessary to fulfill the deliverables outlined in these guidelines. Administrative costs include, but are not necessarily limited to:

- Office space
- Supplies
- Legal or management oversight
- Prorated general liability, Workers' Compensation (may be included in payroll), and automotive insurance

## **Tools, Subscriptions, and Software**

Subscriptions to tools and other software that will help increase capacity, facilitate communication, or otherwise facilitate implementation of the project such as project management software, video conferencing technology subscriptions, and mapping software.

## **Engagement, Outreach, Education, and Training**

Costs related to the development and administration of engagement, outreach, education, and training activities under the grant, including, but not limited to:

- Materials developed for outreach events, trainings, and other grant activities.
- Access to proprietary data or research materials.
- Facilitation for meetings.
- Translation and interpretation for meetings and written materials.
- Marketing and advertisements.
- Participant compensation is an exchange of payment for services rendered in the development of community work products, and appropriately documented with deliverables such as sign in sheets or written surveys. Ensure associated deliverables are clear in the related workplan and budget item.

- Transportation stipends and provision of transportation services for community residents, such as a vanpool.
- Rental costs of equipment, facilities, or venues.

## Ineligible Expenses

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Grant funds may not be used for the following costs:

- Costs that occur outside of the Grant Agreement term.
- Direct and indirect construction costs.
- Direct lobbying.
- Indirect costs in excess of 25 percent of the awarded funds.
- Reimbursements for travel expenses that exceed State of California travel expense limits.
- The following costs associated with community engagement and outreach:
  - » Direct cash benefits or subsidies to participants.
  - » Refreshments.
  - » Participant incentives, such as door prizes, which are unrelated to specific community work products.
  - » General meetings that do not specifically discuss or advance implementation of the grant project.

## Application Checklist

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Complete applications for the CEA-LAT Grant Account will have all the items listed in the checklist below.

<b>Application Packet Checklist (no page limits):</b>	
<input type="checkbox"/>	<b>CEA-LAT Grant Account Application Coversheet</b> (Appendix 4) Must be signed by an individual who has the authority to sign on behalf of the applying organization.
<input type="checkbox"/>	<b>Proof of Eligibility</b> IRS Letter confirming status as a 501(c)(3) entity. The IRS letter must also include the applicant's Tax Identification Number.
<input type="checkbox"/>	<b>Workplan Table</b> (Appendix 1) Must be formatted as separate spreadsheet file(s) from the application narrative.

**Budget Table** (Appendix 2)

Must be formatted as separate spreadsheet file(s) from the application narrative.

**Letters of Support**

Two (2) letters of support from partner organizations or local community leaders that work in or are a part of the communities or populations that the applying organization intends to serve with the CEA-LAT grant funds.

**Application Packet Checklist (15-page limit):**

**Project Narrative**

The project narrative must include sections on:

- Executive Summary
- Organization Background and Qualifications
- Project Need
- Outreach, Education, and Evaluation Plan

See [Appendix 1](#) for the Work Plan template. See [Appendix 2](#) for the Budget instructions. See [Appendix 3](#) for the Budget template. Please submit the Work Plan and Budget as a spreadsheet file.

See [Appendix 4](#) for the PDF of the CEA-LAT Grant Account Application Coversheet. See [Appendix 5](#) for the CEA-LAT Grant Account Application Coversheet Instructions.

Downloadable versions of the application coversheet, workplan table template, and budget table template can be found on the E&A Grant Program webpage here: [www.cpuc.ca.gov/capacitygrants](http://www.cpuc.ca.gov/capacitygrants).

Required formatting for application documents:

- **Font:** no less than 10-point font. Fonts smaller than 10-point font will not be reviewed.
- **Paper Size:** 8 ½” x 11” size paper and numbered consecutively.
- **Stapled, not bound (for paper applications):** upper left-hand corner.
- **Edited and reviewed:** Double-checked for grammar and spelling errors.
- **Page Limit:** 15 pages for the project narrative.
- **Citations:** Cite sources throughout the project narrative. Any citation format is acceptable (APA, numbered references, embedded clickable links).

## Submission

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For electronic applications, please email a completed coversheet, IRS letter, project narrative, workplan table, budget table, and two letters of support to [capacitygrants@cpuc.ca.gov](mailto:capacitygrants@cpuc.ca.gov) and include “CEA-LAT Grant” in the subject line.

For paper applications, please mail completed forms and required documents to:

Business and Community Outreach  
Attn: E&A Grant Program  
California Public Utilities Commission  
505 Van Ness Ave.  
San Francisco, CA 94102

## Post-Application Process

### Application Evaluation

The Commission delegates ministerial review and approval authority to CPUC staff for CEA-LAT Grant Account applications under \$150,000. Staff are directed to evaluate grant applications for eligibility, completeness, and score each application according to the Evaluation and Scoring Criteria (see below).

For applicants that request \$150,000 and above, the Commission reserves discretion to address such applications through the 2–3-month long Resolution process. CPUC staff will evaluate these applications for completeness, ensure they meet all eligibility criteria, score each applicant according to the Evaluation and Scoring Criteria set forth in the program guidelines, and recommend approval of each grantee via Resolution.

Some discussion and adjustments to award amounts or workplan and budgets may be necessary prior to award. The CPUC will notify grantees of awards made via a letter.

### Grant Agreement

Following CPUC award, successful applicants will be provided with a Grant Agreement, which will include an *E&A Grant Program Manual, Terms and Conditions, and Notarized Affidavit*. These documents, along with the applicant's approved *Budget Table and Workplan*, comprise the Grant Agreement. The signatory designated in the Application Coversheet will be required to sign the Grant Agreement and return it to the CPUC **within thirty (30) days** from the date that it was sent (either electronically or via mail).

### Notice to Proceed

Once the applicant's signed Grant Agreement is received and then executed by the CPUC, a Notice to Proceed letter will be sent to the grantee as notification for approval to proceed with project implementation and expenditures. Awards will be posted to the Commission's website.

# Reporting Requirements

Grantees are required to submit a progress report for every six months, starting from the date of the grant agreement. The purpose of this grant reporting requirement is to ensure that grantees provide timely updates on the progress and achievements of their project. All reports are public records and any confidential treatment must be requested consistent with the Commission's General Order 66-D. The Commission will determine the appropriateness of an applicant's request for confidential treatment of any portion of a report, consistent with applicable law and rules.

The reporting periods will be as follows:

1. First reporting period: From the grant start date to the end of the 6<sup>th</sup> month.
2. Second reporting period: From the beginning of the 7<sup>th</sup> month to the 12<sup>th</sup> month.
3. Subsequent reporting periods: Every six months thereafter until the grant project concludes.

A report template will be provided to grantees. Grantees may combine these required reports with budget requests. Grantees may also choose to report the accomplishments of project milestones outside of these required reports as a part of a budget request.

In addition to biannual reports, grantees may be asked to attend brief monthly meetings with grant staff to informally share grant project progress, ask questions, and receive updates.

A final report will include a summary of the remaining unreported activities as well as a summary and evaluation of the entire project's activities and post-project goals, feedback, and lessons learned. The final report template will be sent to grantees after two reporting cycles.

# Attachments and Appendix Items

## Attachment 1: Glossary of Terms

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### **Applicant**

Individual on behalf of an entity or an entity who completes an CEA-LAT Grant application and submits it the CPUC.

### **Application**

A submittal comprised of responses and supporting documents to apply for the grant.

### **Applying Organization**

Entity who is applying to the CEA-LAT Grant Account.

### **Building Decarbonization**

Refers to the umbrella of methods to reduce greenhouse gas emissions from buildings. Read more about building decarbonization at the CPUC here: [Building Decarbonization](#).

### **Building Electrification**

Building electrification is the act of installing electric heating and cooking equipment, such as induction cooktops, heat pump water heaters, and heat pump space conditioning systems. It can be a type of building decarbonization. Read more [here](#).

### **Capacity Building**

The process of strengthening local coordination, leadership, knowledge, skills, expertise, and access to resources in under-resourced communities with the goal of helping to develop or increase the ability of that community to independently engage in state decision-making processes and conduct outreach on clean energy and equity initiatives. Capacity building activities include, but are not limited to, hiring legal expertise, identifying and planning opportunities and barriers for clean energy access and equity initiatives in a given region and identifying existing state programs that can leveraged and means to engage state agencies to implement needed policy changes.

### **Community Based Organization (CBO)**

A public or private nonprofit organization of demonstrated effectiveness that is representative of a community or significant segments of a community and provides educational or related services to individuals in the community.

### **Community Engagement**

The process of working collaboratively with and through groups of people affiliated by geographic proximity, special interest, or similar situations to address issues affecting the well-being of those people.

### **Competitive**

Method in which applications will be evaluated and scored based on the information provided within the application. Applications with higher total scores will take priority for funding over applications with lower total scores.

### **Direct Costs**

Costs directly tied to the implementation of an CEA-LAT grant, including, but not limited to personnel costs, subcontracts, equipment costs, travel expenses, etc.

### **Disadvantaged Communities**

Designation of census tracts and physical locations used to identify the areas most affected by pollution and the people most vulnerable to its effects, based on geographic, socioeconomic, public health, and environmental hazards criteria. The California Environmental Protection Agency (CalEPA) historically bases designations on analyses conducted by the California Communities Environmental Health Screening Tool (CalEnviroScreen) but can also exercise discretion in developing other criteria and methods.

### **Electrification Technologies**

Broadly, any technology that can facilitate a building off gas to instead be fueled entirely by electricity. Specific technologies may include heat pump appliances and induction stoves, but could also include meter socket adapters, smart electric panels (and other load management devices), solar panels, battery storage systems, electric fireplaces and more.

### **Grant Account**

A category of funding awarded through the overall E&A Grant Program.

### **Grant Agreement**

Arrangement between the State and grantee, in which the grantee will be awarded specific funds to be used for specific work within a specific period.

### **Grantee**

Designated entity that has an agreement for grant funding with the State.

### **Healthy Homes**

A healthy home is a structure that is free from the following substandard housing conditions, as defined in the California Health & Safety Code (Section 17920.3):

- Moisture and mold that can cause or worsen illness or damage personal belongings;

- Pests that can cause illness or are a nuisance;
- Unsafe conditions and poorly maintained plumbing, heating and other systems that can lead to injuries and other problems;
- Unventilated areas that can increase indoor pollutant levels.

See more from the [California Department of Public Health](#).

## Indicators

Quantitative measures, including project-related metrics that show changes in conditions over a period.

## Indirect Costs

Expenses of doing business that are of a general nature. These costs are not directly tied to the grant but are necessary for the general operation of the organization. Examples of indirect costs may include but are not limited to: personnel costs associated with administrative, supervisory, legal, and executive staff; personnel costs associated with support units, including clerical support, housekeeping, etc.; and operating expenses and equipment costs not included as part of direct project costs.

## Technology and Equipment for Clean Heating (TECH) Program

A CPUC program implemented by Energy Solutions that offers rebates for installing space and water heater heat pumps in both residential and commercial properties. Rebates can be combined with other non-CPUC incentive programs. Higher rebates are available for equity customers.

Program Website: [TECH Public Reporting TECH Home Page \(techcleanca.com\)](#)

Contractor Facing Website: [TECH Clean California Contractor Knowledge Base](#)

Customer Facing Website (includes non-CPUC rebates): <https://switchison.org/>

## Travel Reimbursement

State rates and conditions established on the CalHR website, (<https://www.calhr.ca.gov>) except for “incidentals” and out-of-state travel, which will not be reimbursable.

## Underrepresented Communities

Communities whose presence and participation in state decision-making processes and programs connected to clean energy access and equity initiatives is much smaller than their presence in society as a whole.

## Underserved Communities

As defined by Public Utilities Code Section 1601(e), which states: ‘Underserved community’ means a community that meets one of the following criteria: (1) Is a ‘disadvantaged community’ as defined by subdivision (g) of Section 75005 of the Public Resources Code; (2) 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; (3) 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; (4) 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; and (5) Is a community located on lands belonging to a federally or non-federally recognized California Native American Tribes (Tribes).

# Appendix 1: Sample Workplan Table

This Sample Workplan table can be used for the Clean Energy Access -- LA County TECH Grant Application.

Although there is no required project length, CEA-LAT grant projects must be completed by April 1, 2030 to allow time for final invoice processing.

Visit the Equity and Access Grant Program webpage to download the Microsoft Excel version of the Sample Workplan at: [www.cpuc.ca.gov/capacitygrants](http://www.cpuc.ca.gov/capacitygrants).

Equity and Access Grant Work Plan						
To be used for both Equity, Engagement, and Education and Clean Energy Access Grant Accounts						
Task Number	Activities to Accomplish Stated Goals	Project Staff Involved	Start Date	End Date	Performance Measures (used to measure goals)	Expected Outcomes (The outcomes you get when accomplishing your goals)
<b>Goal 1</b>	<b>Build Legal Capacity</b>	<b>Ben Kinney, Executive Director</b>			<b>Hire one in-house attorney and build a new regulatory function for our organization.</b>	<b>Our organization will become a Party to MIP Proceeding and will file reply comments.</b>
<b>Task 1.1</b>	Draft Scope of Work	Ben Kinney, Executive Director	7/7/2023	7/12/2023		
	Interview attorneys and consultants	Ben Kinney, Executive Director, Concepcion Rui, Chair of the Board	7/18/2023	8/6/2023		
	Hire legal resource	Ben Kinney, Executive Director, Concepcion Rui, Chair of the Board	8/10/2023	8/15/2023		
	Create plan for CPUC engagement with new legal resource	Ben Kinney, Executive Director	8/24/2023	8/26/2023		
<b>Task 1.2</b>						
<b>Task 1.3</b>						
<b>Goal 2</b>	<b>Build Staff Capacity to educate community on CPUC proceedings</b>	<b>Darla Ramirez, Organizing Director</b>			<b>Trained 5 organizers to educate the community on active proceedings</b>	<b>The community will become aware and educated on the High DER proceeding and will provide input on the impacts of the proposed regulations.</b>
<b>Task 2.1</b>	Hold 2 staff trainings on High DER Proceeding	Darla Ramirez, Organizing Director	8/21/2023	9/15/2023		
<b>Task 2.2</b>	Hold 2 staff trainings on Microgrid Incentive Program Proceeding	Darla Ramirez, Organizing Director	8/8/2023	9/26/2023		
<b>Task 2.3</b>	Prepare community materials and presentation	Darla Ramirez, Organizing Director	Month 3 (beginning)	Month 4 (end)		
<b>Goal 3</b>						
<b>Task 3.1</b>						

Start and end dates for each task may be specific or written in a generalized fashion to accommodate different start dates.

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## Appendix 2: Grant Budget Table Instructions

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Appendix 3 is an example of how a budget table must be itemized. It is included to give you an idea of the level of detail expected. Make sure to provide enough detail so application evaluators understand what is being budgeted (i.e., provide detail as to what materials/supplies will include).

### **General descriptions will not be accepted/considered.**

Round budget line items to the nearest whole dollar. Items less than fifty cents should be rounded down and those at fifty cents or more should be rounded up. Review your budget table to ensure the budget adds up correctly.

Time spent by a staff performing an activity directly related to the execution of the grant (not supervision or writing reports), such as speaking at events, drafting program materials, etc., is a direct cost and should be charged to the appropriate activity.

Time spent on personnel costs should include the first name and last name, title, rate of pay (e.g., \$15/hour) of the staff person listed. Include personnel rates as hourly rates. Hourly personnel rates should be reasonable. Hourly rates over \$100/hour will need explanation or justification (i.e., breakdown of costs that may be included in the hourly rate). If including benefits in the hourly rate, include a breakout of the hourly rate and fringe benefits charged. Please account for any yearly increases in rates. Not-to-exceed hourly rates are acceptable. Grantees will need to track staff time by task for expense reimbursement.

Total indirect costs shall not exceed 25 percent (25%) of the total grant award. Indirect costs are expenditures not capable of being assigned or not readily itemized to a particular activity but considered necessary for the operation of the organization and the performance of the program. Overhead, the costs of administrative operations, accounting services, and in-house printing are examples of indirect costs. List the names of the indirect costs that will likely be covered. If awarded, grantees will need to provide the method(s) of cost allocation.

A complete budget table must be submitted for a complete Clean Energy Access -- LA County TECH Grant Application.

Travel must follow the [State of California guidelines](#) for travel reimbursements.

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## Appendix 3: Sample Budget Table

This Sample Budget table can be used for the CEA-LAT Grant.

Visit the Equity and Access Grant Program webpage to download a Microsoft Excel version of the Sample Budget Table at: [www.cpuc.ca.gov/capacitygrants](http://www.cpuc.ca.gov/capacitygrants)

Equity and Access Grant Budget Table						
To be used for both Equity, Engagement, and Education and Clean Energy Access Grant Accounts						
Task Number	Budget Item	Explanation	Rate	Unit	Number of Units	Cost
<b>Objective 1</b>	<b>Develop plan to build capacity to engage on the Distributed Energy Resources proceeding by hiring legal consultant and educating organizing staff</b>					
<b>Task 1.1</b>	<b>Hire legal consultant to become party to proceeding and organize internal staff team to keep track of proceeding</b>					
	Gordon Wu, Executive Director	5 hours/week x 50 weeks @ \$30/hour	\$30.00	hour	250	\$7,500
	Miriam Hernandez, Policy Director	25 hours/week x 2 weeks @ \$20 hour	\$20.00	hour	50	\$1,000
	Penelope Marbella, HR Director	6 hours/week x 6 weeks @ \$25/hour	\$25.00	hour	36	\$900
<b>Task 1.2</b>	<b>Train community organizers on DER proceeding and plan community outreach</b>					
	Consultant: Melanie Harris, Trainer	8 hours/week x 1 week @ \$20/hour	\$40.00	hour	8	\$320
	Sam Cachu, Senior Community Organizer	25 hours/week x 50 weeks @ \$18 hour	\$18.00	hour	1250	\$22,500
<b>Task 1.3</b>	<b>Prepare and conduct meeting with 20 interested community residents and informed youth educators</b>					
	George Williams, Organizing Director	8 hours/week x 20 weeks @ \$17.00/hour	\$17.00	hour	160	\$2,720
<b>Objective 2</b>	<b>Become Party to DER Proceeding</b>					
<b>Task 2.1</b>	<b>Submit paperwork and prepare to submit comments</b>					
	Imelda Jackson, Attorney	20 hours/week x 1 weeks @ \$175/hour	\$175.00	hour	20	\$3,500
	Miriam Hernandez, Policy Director	15 hours/week x 2 weeks @ \$20 hour	\$20.00	hour	30	\$600
<b>Objective 3</b>	<b>Develop and Disseminate Outreach Collateral</b>					
<b>Task 3.1</b>	<b>Develop and Design 6"x 11" postcard</b>					
	Graham Singer, Graphic Designer	3 hours/week x 1 week @ \$50/hour	\$50.00	hour	3	\$150
						\$0
<b>Total Grant Budget</b>						<b>\$39,040</b>

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## Appendix 4: CEA-LAT Grant Application Coversheet



### *Equity And Access Grant Program*

### Clean Energy Access -- LA County TECH Grant Account Application Coversheet

Before completing this form, refer to the Coversheet Instructions in Appendix 5 of the CEA-LAT Grant Guidelines for more details on each section below.

For your application to be considered complete and eligible for award, an IRS letter confirming 501(c)(3) status, a project narrative, workplan table, budget table, and two letters of support must be attached to this application coversheet. Consult the CEA-LAT Grant Guidelines on the CPUC website for more information at: [www.cpuc.ca.gov/capacitygrants](http://www.cpuc.ca.gov/capacitygrants).

#### 1. CONTACT INFORMATION

First and Last Name:		
Title:		
Organization Name:		
Employer Identification Number:		
Phone Number:		
Email:		
Physical Address:		
Mailing Address: (if different from above)		
Website:		

#### 2. COMMUNITIES SERVED BY GRANT PROJECT

Select only one:	Los Angeles County	Exclusively Aliso Canyon Disaster Area or San Fernando Valley
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If serving only a smaller area within the above area selected, please list locations:		
(Optional) Reach Estimate:		
<b>3. ELIGIBILITY</b>		
<p><input type="checkbox"/> The Applicant is a California tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code.</p> <p><input type="checkbox"/> The Applicant is not operated by a local government.</p> <p><input type="checkbox"/> The Applicant is not proposing to operate as a fiscal sponsor for the project proposed in this application.</p>		
<b>4. REQUESTED GRANT AMOUNT*</b>		
<p><i>*A budget plan is required. Please use the budget template outlining your planned expenses and enter total cost above.</i></p>		
<b>5. ATTESTATION</b>		
<p>I, the undersigned, am a legal representative of the Applicant, and declare under penalty of perjury under the laws of the State of California that, to the best of my knowledge, all the statements and representations made in this Application are true and correct.</p> <p>Signed: _____</p> <p>Name (Print): _____</p> <p>Date: _____</p>		
<p><b>For electronic applications, please email completed forms, proof of eligibility, a project narrative, workplan table, budget table, and two letters of support to <a href="mailto:capacitygrants@cpuc.ca.gov">capacitygrants@cpuc.ca.gov</a> and include “Clean Energy Access -- LA County TECH Grant” in the subject line.</b></p> <p><b>For paper applications, please mail completed forms and required documents to:</b></p> <p style="padding-left: 40px;"> <b>Business and Community Outreach</b>  <b>Attn: E&amp;A Grant Program</b>  <b>California Public Utilities Commission</b>  <b>505 Van Ness Ave.</b>  <b>San Francisco, CA 94102</b> </p>		

## Appendix 5: CEA-LAT Grant Application Coversheet Instructions

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All applicants must submit a completed and signed Clean Energy Access -- LA County TECH Grant Application Coversheet. Please refer to the Guidelines above for additional information.

### Coversheet Instructions

#### 1. Contact Information

**First and Last Name:** Name of individual representative participating in the eligible activity(s) claimed on this application on behalf of the applying organization.

**Title:** Job title of applying organization's representative.

**Organization Name:** Name of organization being represented in the eligible activity.

**Employer Identification Number:** Provide organization's Employer Identification Number (EIN) provided by the Internal Revenue Service (IRS). The EIN is a unique number that identifies the organization to the IRS. This is required for grant award payment.

**Phone Number:** Phone number where the applying organization representative can be reached.

**E-mail:** E-mail address where the applying organization's representative can be reached.

**Physical Address:** Address where the applying organization is physically located (street, city, state, zip code).

**Mailing Address:** If different from physical address, address where applying organization receives its mail (street, city, state, zip code).

**Website:** Applying organization's website URL.

#### 2. Communities Served By Grant Project

The applicant must select the checkbox for one of the following options:

- Los Angeles County
- Exclusively Aliso Canyon Disaster Area or San Fernando Valley

Please also list locations served, if more specific than those 2 options. Otherwise, leave blank. For example, if you intend to serve only the cities of Carson and Compton within LA County, select "Los Angeles County" and write "Cities of Carson and Compton". If you intend to serve only the communities of Porter Ranch and Granada Hills, select "Exclusively Aliso Canyon Disaster Area or San Fernando Valley", and write "Communities of Porter Ranch and Granada Hills."

Optional. Estimate the maximum reach of your grant project. In the right-hand box, write a unit of measurement, such as households or individual residents. In the left-hand box, write the numerical estimate. This is an estimate to gauge the potential of the CEA-LAT Grant Account overall; applicants are not scored on the coversheet estimate and will not be held to the coversheet estimate.

3. Eligibility

Confirm that your organization is a California tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code. Confirm that your organization is not operated by a local government. Confirm that your organization is not acting as a fiscal sponsor and will be the organization executing the grant project.

4. Requested Grant Amount

In dollars, the specific total grant amount being requested (e.g., \$100,000.00). The maximum award per grant is \$200,000. A budget plan is required as an attachment detailing how the total requested grant amount was calculated; make sure the amount listed on the coversheet and budget plan match.

Refer to the Equity & Access Grant Program Guidelines for a list of eligible and ineligible activities and expenses eligible for reimbursement.

5. Attestation

The representative for the applying organization must sign, print their name, and date this form.

By signing, the representative attests to the attestation statement on the form.