



SELF-GENERATION
INCENTIVE PROGRAM

SGIP Combined 3rd & 4th Quarterly Workshop of 2022

November 1, 2022



Safety Message - Cybersecurity

Presenter: Sandi Linares-Plimpton SoCalGas



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It is important to be aware of potential phishing emails and text messages. Phishing is a cybercrime that targets individuals by email or phone posing as a legitimate and often trusted institution or person to gain access to your sensitive information.

Some items to look for to identify these types of emails are:

- The external banner – Ask, yourself, are you expecting this email? Did you initiate the conversation?
- Subject line – Ask, yourself, am I being scared into action? Why are they asking for my email password?
- Sender/return email address – Ask, yourself, does the domain name match the company name? Are they different?
- Body of the email – Are there key words or links in the body of the email that are unusual from this sender or otherwise generally suspicious?

When possible, contact the sender to verify the email.



Safety Message - Cybersecurity

Presenter: Sandi Linares-Plimpton SoCalGas



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Example: The SGIP PAs have become aware of the phishing email below. SGIP uses the secured selfgenca.com database for the transfer of application information. Should you receive a suspicious email asking for alternate submission pathways please contact your project Applicant and/or your Program Administrator prior to clicking on any links.

From: Rafita T <rafitoretz@gmail.com>
Subject: Membership Suspension Notice
Date: October 18, 2022 at 2:23:52 PM PDT
To: undisclosed-recipients,

**Self-Generation
Incentive Program**
San Diego Gas & Electric® (SDG&E) Territory

ATTENTION

SGIP Developer Report / Membership notice- Attached are payment remittance documents generated on 10/18/2022 that require your signature. To open these documents you must sign in through our PDF secured Downloader [HERE](#)

NOTE: The s(PW)s code means your email password

You have 24 hours to complete these steps to avoid Membership License suspension.

Thank you
Assistant of Administration

Legal disclaimer This email is intended for the addressee(s) stated above only and may contain confidential information or Intellectual Property Rights, both protected by law. You are hereby notified that any unauthorized reading; disclosure, copying or distribution of this email or any use of information contained herein is strictly prohibited. If you are not an intended recipient, please delete it immediately thereafter without retaining any copies on your systems. Please note that we will not accept any responsibility for viruses and it is your responsibility to scan attachments (if any)

Introduction



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Program Administrator Teams

SCE:

- Jim Stevenson
- Vicky Velazquez

SoCalGas:

- Jason Legner
- Adrian Martinez
- Sandi Linares-Plimpton
- Laura Diaz
- Jan Santos
- Ashley Pezikian

CSE:

- Vanessa Melvin-Gunn
- Melissa Cintron
- Shalene Watanabe-O'Toole
- Dema Tzamaras

PG&E:

- Ron Moreno
- Ozzy Guzman
- Jacklin Campos-Perez
- Brian Bishop



Introduction (continued)



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Working Group Support Teams

AESC (Technical)

- Dara Salour
- Stephanie Raya

Energy Solutions (Database)

- Kelsey Alders
- Alejandro Prieto

Energy Division (CPUC)

- Gabriel Petlin
- Fang Yu Hu



Teams Meeting



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Function	Teams Icon
Controls	
Mute – <i>Remain muted unless called on</i>	
Raise Your Hand – <i>Wait until you are confirmed to speak on the chat or host</i>	
Type Your Question or Comment	



Agenda



- Welcome and Introductions - SoCalGas
- Program Metrics - Pacific Gas & Electric
- Regulatory Updates - Southern California Edison
- SGIP Low-Income Program Accessibility - SoCalGas
- SGIP Handbook Streamlining - Center for Sustainable Energy
- SGIP Handbook Website Launch - Alternative Energy Systems Consulting, Inc.





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Program Metrics

Presenter: Ron Moreno – Pacific Gas & Electric



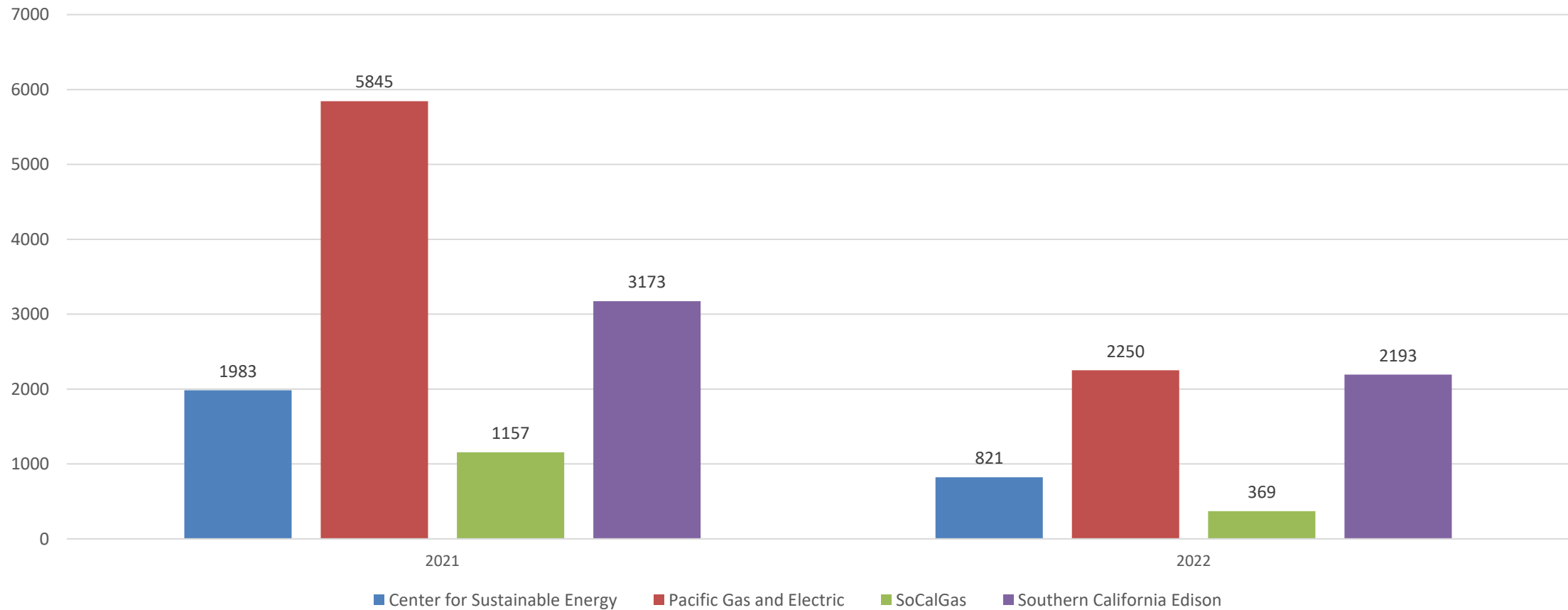
Program Metrics

Data: 2021 – October 25, 2022



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Number of Applications Submitted by Year and PA



Does not include cancellations and waitlist projects

Public

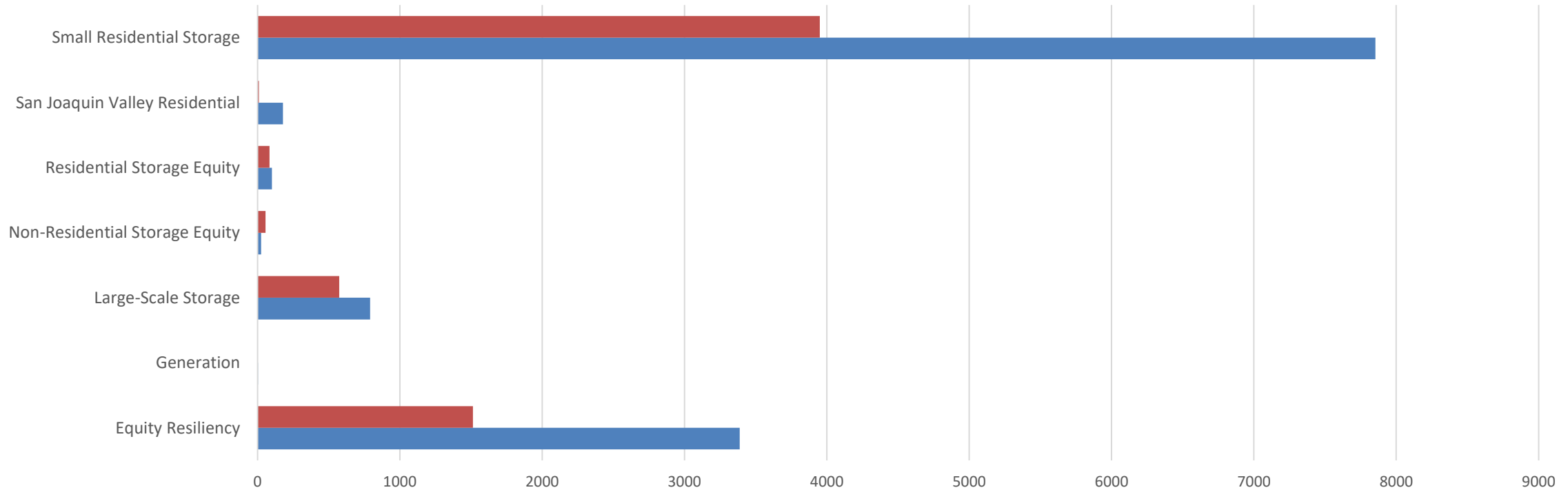
Program Metrics

Data: 2021 – October 25, 2022



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Number of Applications by Budget Category



	Equity Resiliency	Generation	Large-Scale Storage	Non-Residential Storage Equity	Residential Storage Equity	San Joaquin Valley Residential	Small Residential Storage
■ 2022	1514	3	575	56	84	10	3950
■ 2021	3387	4	791	25	101	179	7853

■ 2022 ■ 2021

Public

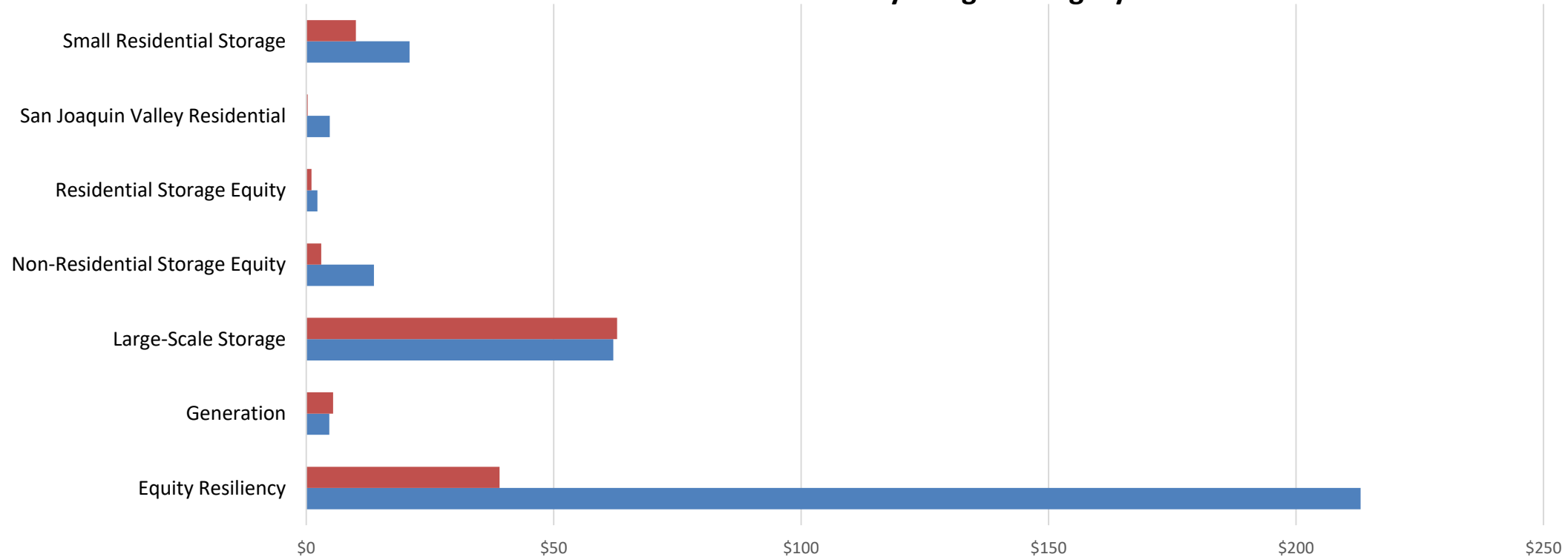
Program Metrics

Data: 2021 – October 25, 2022



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Total Incentive Dollars by Budget Category



	Equity Resiliency	Generation	Large-Scale Storage	Non-Residential Storage Equity	Residential Storage Equity	San Joaquin Valley Residential	Small Residential Storage
■ 2022	\$39,073,791	\$5,433,221	\$62,789,267	\$3,006,630	\$1,042,801	\$264,000	\$10,014,870
■ 2021	\$213,040,400	\$4,632,000	\$62,040,280	\$13,694,487	\$2,244,508	\$4,725,600	\$20,859,529

Public

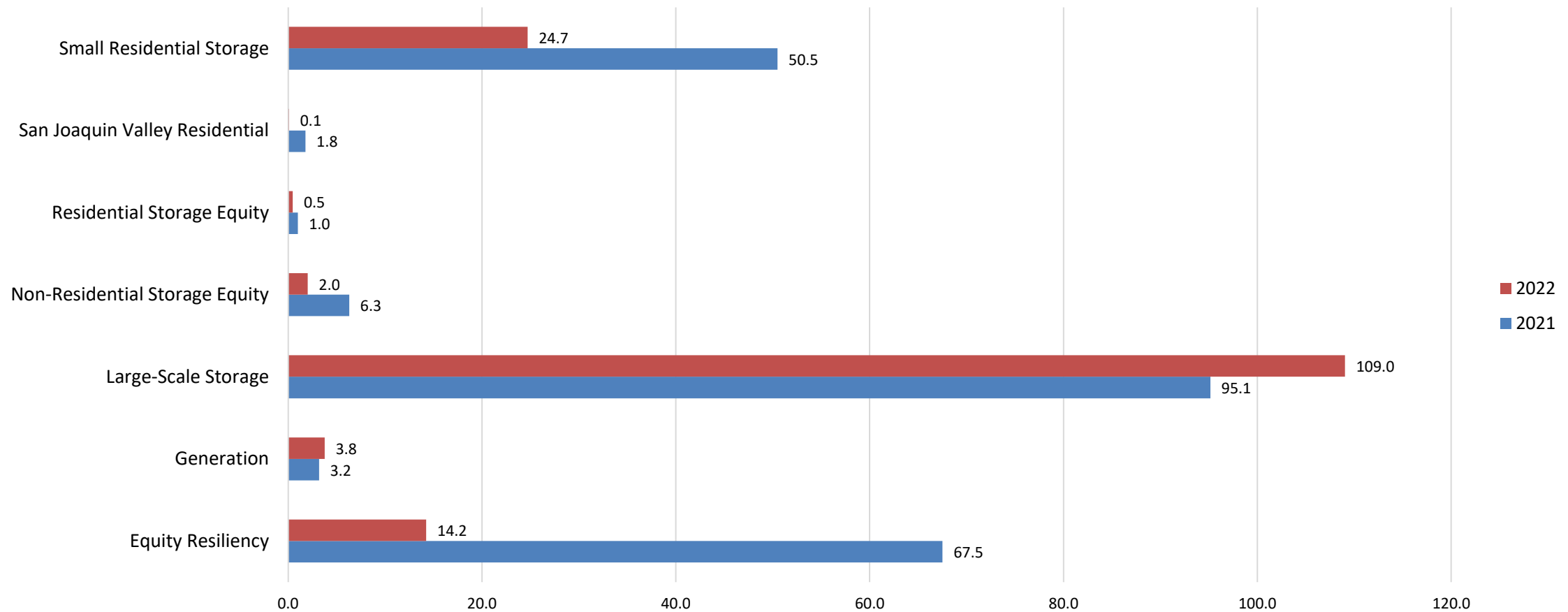
Program Metrics

Data: 2021 – October 25, 2022



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Total Rated Capacity (MW) by Budget Category



Public

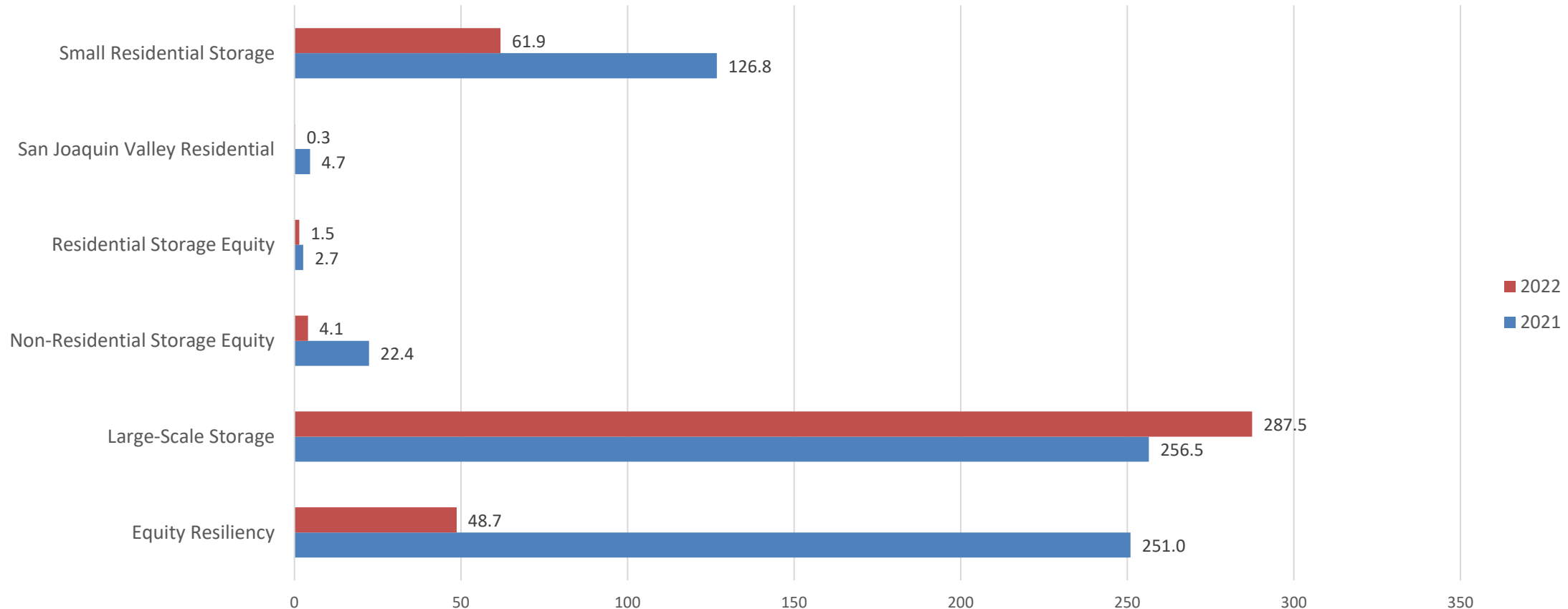
Program Metrics

Data: 2021 – October 25, 2022



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Total Energy Capacity (MWh) by Budget Category



Public

Program Metrics

As of October 25, 2022



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Budget Category	CSE	SCE	SCG	PG&E
Large-Scale Storage	Step 4	Waitlist	Waitlist	Waitlist
	\$8,128,739			
Small Residential Storage	Step 7	Step 7	Step 6	Step 7
	\$553,443	\$9,920,490.52	\$204,922	\$3,227,275
Residential Storage Equity	Step 5	Step 5	Step 5	Step 5
	\$2,887,472	\$2,855,082	\$911,603	\$5,334,511.66
Non-Residential Storage Equity	Waitlist	Waitlist	Waitlist	Waitlist
Equity Resiliency	Waitlist	Step 5	Waitlist	Waitlist
		\$356,563		
San Joaquin Valley Residential		Step 5		Waitlist
		\$4,563,200		
San Joaquin Valley Non-Residential		Step 5		Step 5
		\$120,000		\$120,000
Generation	Step 3	Step 3	Step 3	Step 3
	\$15,507,136	\$33,508,542	\$11,547,246	\$37,264,768

SCE will open their Small Residential Storage budget Step 7 on November 28, 2022.

SCG has reached the 50% Residential Storage Soft Target Cap for Small Residential Step 6

CSE and PG&E have reached the 50% Residential Storage Soft Target Cap for Small Residential Step 7

When additional funding is provided in a given budget category, applications on a waitlist will be awarded funding in the order they were received

https://www.selfgenca.com/home/program_metrics/

Program Metrics



Questions?





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Regulatory Updates

Presenter: Jim Stevenson – Southern California Edison



Regulatory Updates



Modifications to Inspection Protocol Procedures

Joint Advice Letter (PGE 4644-G/6680-E; CSE 136-E; SCE 4848-E; SCG 6020-G) to modify SGIP Inspection Protocol approved 10/26/2022. Effective Date: 9/15/2022

Figure 1: Comparison of Current Protocol to Proposed Changes

Inspection Process	Before (current process)	After (proposed change)
Accepted Into Sampling	3 Inspections	2 Inspections
Sampling Rate	1:5	No Change
Six Passed Inspections	1:10	1:15
New Equipment Models	3 Inspections	1 Inspection



Regulatory Updates



Petition for Modification for Developers Going out of Business

On May 20, 2022, PG&E filed on behalf of the other SGIP PAs the Petition for Modification for Developers Going out of Business.

- Seeks Modification to Decisions (D.) 11-09-015, D.15-06-002, and D.19-08-001.
- Approximately 270 projects left with no developer currently unable to move forward to completion.
- Petition for Modification seeks to relieve these customers along with future customers who “unexpectedly and permanently lose contact with their developer due to the developer declaring bankruptcy or otherwise going out of business” by granting exceptions to:
 - Extensions
 - Warranty Requirements
 - Ongoing Developer Fleet Compliance Operations



Regulatory Updates



Mainspring Energy, Inc. Petition for Modification of D.11-09-015

On August 19, 2022, Mainspring Energy, Inc. filed a Petition for Modification requesting that the Commission to modify its performance-based incentive calculation methodology as specified in D.11-09-015

- Seeks to modify the anticipated capacity factor for eligible dispatchable projects.
- The PBI calculation should be modified to accommodate dispatchable renewable generation that provides essential emissions reductions, resiliency and grid support.
- The current PBI methodology assuming 80% capacity factor is reasonable for generators that provide baseload power, however for dispatchable generators this methodology would prevent the project from receiving its full potential SGIP incentive value.
- For a dispatchable renewable generation project the anticipated capacity factor shall be agreed upon, on a project-specific basis, with the Program Administrators, but not to be below 10%.

SGIP Program Administrators are supportive of the PFM.



Regulatory Updates



Assigned Commissioner's Ruling (ACR)

On October 26, 2022, the Commission issued the Assigned Commissioner's Ruling (ACR) seeking comments on improving Self-Generation Incentive Program (SGIP) equity outcomes and implementing AB 209

- The Legislature provided \$900M from the General Fund to SGIP and AB 209 allocates 70% of that funding towards incentives for low-income residential BTM solar paired with storage systems or new storage systems, and 30% towards residential storage systems (general market).
- The AB 209 funding will be available in FY23/24 and residential customers served by a publicly-owned electric utility (POU) are also eligible.
- The ACR seeks input on 38 questions covering 9 topics focused on AB 209 implementation, obstacles to low-income and tribal participation, and operational changes (including demand response participation).
- Comments are due December 2 and reply comments December 16.



Regulatory Updates



Questions?





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SGIP Low-Income Program Accessibility

Presenters: Laura Diaz and Adrian Martinez - SoCalGas



SGIP Low-Income Program Accessibility



Objective

To identify and understand the SGIP participation barriers that exist for low-income customers and discuss possible solutions the Program Administrators can support today or as context for future regulatory proceedings. As noted in the Regulatory Update, the Commission (on October 26, 2022) released an Assigned Commissioner's Ruling also requesting feedback to improve SGIP program equity outcomes and otherwise implement AB 209. Comments to that ACR are due December 2nd.

Developer Feedback

SoCalGas reached out to several developers actively participating in the SGIP Equity and Equity Resiliency budgets to solicit feedback specific to the challenges they have experienced in engaging low-income customers eligible for SGIP participation. That feedback will be the foundation of today's discussion.



Host Customer Eligibility- Equity Budgets Multifamily



Host Customer Eligibility- Multifamily (SGIP Handbook Section 4.1.1.1)

Eligible multifamily housing is defined as:

- a) a multifamily residential building of at least five rental housing units that is operated to provide deed-restricted low-income residential housing and is either
 - i. located in a disadvantaged community or
 - ii. is a building where at least 80% of the households have incomes at or below 60% of the area median income. Any customer account in such buildings will be eligible for the Equity Budget.

Required Verification Materials (SGIP Handbook Section 5.4.1 #6)

- SGIP Multifamily Low-Income Housing Documentation Cover Sheet
- Copy of Deed-Restriction or Regulatory Agreement
- Proof of Indian Country Qualification (*Indian Country Multifamily projects only*)

The Equity Budget is also available to multifamily properties that have reserved funds in the MASH or SOMAH programs.

- A copy of MASH or SOMAH Reservation Letter will be required



Host Customer Eligibility- Equity Budgets Single-Family Projects



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Host Customer Eligibility- Single-family (SGIP Handbook Section 4.1.1.1)

The Equity Budgets are available to customers living in single-family low-income residences sold at an affordable housing cost to a lower income household that is subject to:

- a) income verification and
 - i. a resale restriction or;
 - ii. an equity sharing agreement, for which the homeowner does not receive a greater share of equity than described in paragraph (2) of subdivision (c) of Section 65915 of the Government Code, with a public entity or nonprofit housing provider organized under Section 501(c)(3) of the Internal Revenue Code that has as its stated purpose in its articles of incorporation on file with the office of the Secretary of State to provide affordable housing to lower income households.

Required Verification Materials (SGIP Handbook Section 5.4.1 #6)

- Proof of Income Qualification
- Proof of PU Code Section 2852 Compliance
- Proof of Indian Country Qualification (*Indian Country Single-family projects only*)

The Equity Budget is also available to residential customers who have participated or who are eligible for the SASH or DAC-SASH programs.

- A copy of SASH or DAC-SASH Reservation Letter will be required



SGIP Low-Income Program Accessibility



Low Income Participation in Equity and Equity Resiliency Budgets

Residential Storage Equity (RSE) Budget	
Multi-Family Low Income	158
Single-Family Low Income	131
<i>Total No. of RSE Applications</i>	289

Remaining RSE Funds Statewide \$12 Million

Equity Resiliency (ER) Budget	
Low Income Qualifier	70
Other ER Qualifiers	10,929
<i>Total No. of ER Applications</i>	10,999

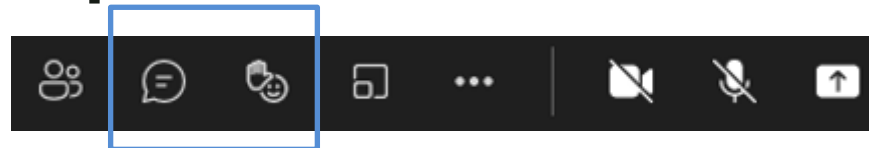
Remaining ER Funds Statewide \$3.9 Million*

*All PAs have gone into an ER Waitlist status. Available funds in any territory are by way of attrition. The \$3.9M currently available is in SCE territory.





Open Discussion



*SoCalGas will be documenting the barriers and recommendations resulting from today's discussion.

SGIP Low-Income Program Accessibility



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
For today's discussion, SoCalGas reached out to several developers to solicit feedback on their experience in engaging low-income customers for participation in the SGIP Equity and Equity Resiliency budgets. As part of that outreach, SoCalGas asked what barriers they feel are preventing significant SGIP engagement by this customer segment. The feedback received will form the basis of today's discussion as we dig into those areas identified. SoCalGas also requested those developers join today's discussion with their responses or to provide additional feedback.



SGIP Low-Income Program Accessibility



A few developers indicated they are not actively targeting low-income customers in their marketed outreach.

- How many developers on today's call are reaching out to customers that are low-income or located in low-income census tracts? 
- For those developers not actively marketing to this customer segment, what is the primary reason?



SGIP Low-Income Program Accessibility



Some developers indicated that low-income customers do not proactively contact them to participate in SGIP.

- Do participants today agree that this is the case, or are low-income qualified customers reaching out to install SGIP incentivized systems but choosing not to continue?



SGIP Low-Income Program Accessibility



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Of the developers reaching out specifically to low-income customers, they indicated these customers were often unresponsive.


- For those participating today that indicated they are reaching out to low-income communities, are you finding these customers are responsive?
- What challenges are you finding in their interest or communication?



SGIP Low-Income Program Accessibility



Feedback received also indicated that SGIP is a very complex application process and, from the customer's perspective, very document-intensive.

- Is this supported by consensus today? 
- What specific program requirements or documents are primary barriers for low-income customer participation?
- Are there other general program requirements or documents (that are not specific only to low-income customers) that are problematic for low-income customers?

• Additional Low-Income Documentation:

Multifamily

- SGIP Multifamily Low-Income Housing Documentation Cover Sheet
- Copy of Deed-restrictions or Regulatory Agreement
- Proof of Indian Country Qualification (Indian Country Multifamily projects only)
- Copy of MASH or SOMAH Reservation Letter (if property has reserved funds)

Single Family

- Proof of Income Qualification
- Proof of PU Code Section 2852 Compliance
- Proof of Indian Country Qualification (Indian Country single-Family projects only)
- Copy of MASH or SOMAH Reservation Letter (if property has reserved funds)



SGIP Low-Income Program Accessibility



Thank you also to CALSSA, who reached out to members to solicit feedback on potential barriers of SGIP participation by low-income customers. They identified that the program requirements specific to resale restrictions and equity sharing agreements were the primary barriers of participation by these customers.

- Consensus?
- Other comments or feedback on these requirements?



SGIP Low-Income Program Accessibility



Upfront Project Costs:

Low-income customers may not be able to afford the upfront cost of installing a battery system and wait for the incentive issued only after installation is complete.

Others identified this should *not* be an insurmountable barrier since financial institutions that offer financing for solar installs also offer financing for battery installations. However, low-income customers may not be taking advantage of these financing options to avoid upfront costs.

- Is the expectation of low-income customers to carry upfront costs a barrier of participation?
- Are financing options available being utilized to address this barrier (either by customers or developers)?



SGIP Low-Income Program Accessibility



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Open Discussion:

Additional barriers or other program considerations?





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SGIP Handbook Streamlining

Presenter: Melissa Cintron – Center for Sustainable Energy

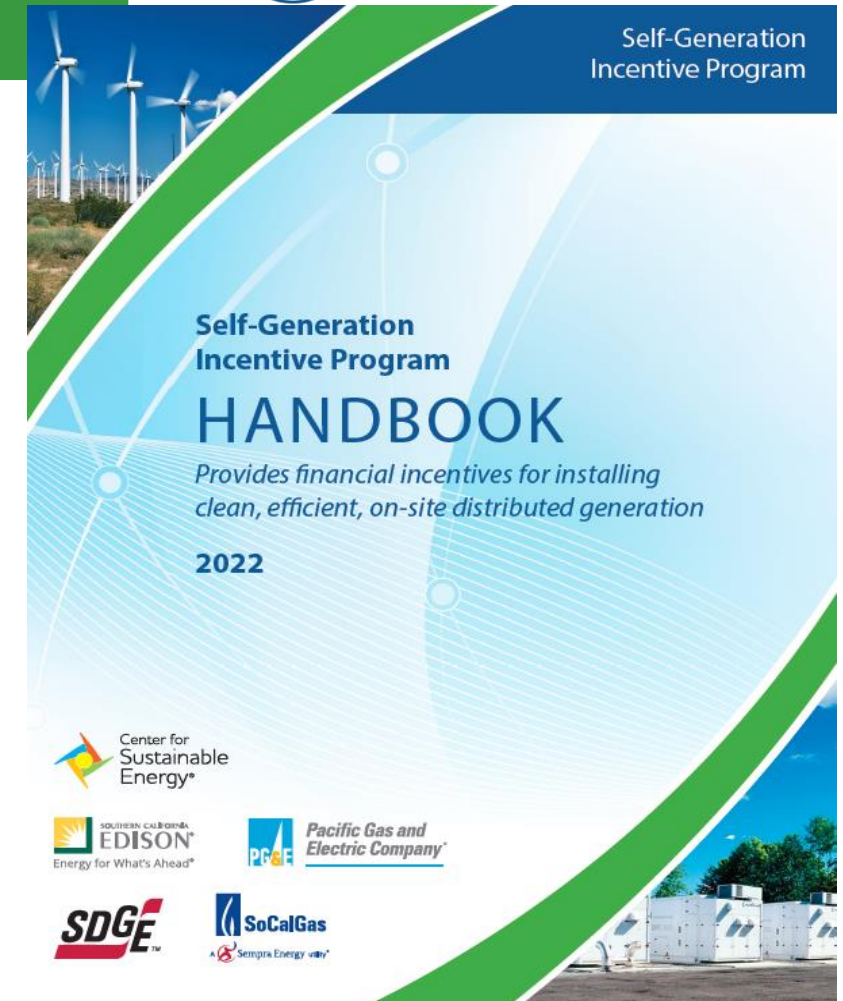


Handbook Streamlining



Overview

- The Handbook establishes program policies and procedures for participants
- Program Administrators collaborated with Energy Division to update the Handbook
- Multiple section updates occurred between 2020-2022, which lead to a fragmented document



Handbook Streamlining



Objective

Improve Handbook readability & comprehension by clarifying policies & eligibility requirements

Methods

How can we achieve this?

- Grouping related sections
- Creating visual tables
- Provide additional section context
- Overall content updates

Our current tasks are:

- Review all references for accuracy
- Review all footnotes for accuracy & applicability
- Review tables for accuracy
- Format and edit the application requirements checklist



Handbook Streamlining



Notable Updates

Table of Contents

- Organizational formatting & grouping
- Changes to section & subsection numbers

Updated Visuals & References

- Introduction to reformatted tables
- Updated table references

Program Equipment Requirements Section 5: → Section 4
Residential Equity Resiliency Eligibility Section 3.1.1.3 → 4.1.1.3

Table 5.4.2: Proof of Project Milestone Requirements

Required Materials (3-Step Projects)
1. Online Proof of Project Milestone Form (All Projects)
2. Copy of RFP or equivalent after 90 days (Public Entity Projects Only)
3. Copy of Executed Contract or Agreement for Installation (All Projects) <ul style="list-style-type: none">• Includes Required Warranty Documentation

Handbook Streamlining- Timeline



All Handbook edits must be approved by all Program Administrators

Action Items	Projected Completion Date
CSE circulated Handbook for Program Administrator edits	October 14 th , 2022
Program Administrator feedback due date	November 3 rd , 2022
Collective Handbook review meeting	November 14 th and 15 th , 2022
CSE to compile all comments, edits, and recommendations for next version	November 18 th , 2022
Next round of edits	TBD



SGIP Handbook Streamlining



Questions?



Searchable Online Handbook



Demonstration of Features and Functionality

A screenshot of the Self-Generation Incentive Program Handbook website. The page has a light blue background with a dark blue header. The main heading is "Welcome to the Self-Generation Incentive Program Handbook". Below this is a paragraph of text explaining the program. There are two main content areas: "View the Handbook" and "Application Requirements", each with a "Start" button. At the bottom, there are logos for Pacific Gas and Electric Company, Center for Sustainable Energy, SDGE, SoCalGas, and EDISON. A footer contains a disclaimer about the program's approval and administration.

Welcome to the Self-Generation Incentive Program Handbook

The Self-Generation Incentive Program (SGIP) provides financial incentives for the installation of new qualifying technologies that are installed to meet all or a portion of the electric energy needs of a facility. This website provides access to the handbook which establishes the policies and procedures of the SGIP for potential program participants and other interested parties. In addition, you can generate an estimated incentive for anticipated projects, and get direction on how to reserve and apply for incentives.

View the Handbook
Start

Application Requirements
Start

Pacific Gas and Electric Company
 Center for Sustainable Energy
 SDGE
 SoCalGas
 EDISON

The SGIP has been approved by the California Public Utilities Commission (CPUC) and is subject to change in whole or in part at any time without prior notice. Any changes made to the SGIP will be published in revisions to this Handbook and/or posted at each Program Administrator's (PA's) website. The Program Administrators are Pacific Gas and Electric (PG&E), Southern California Edison (SCE), the Southern California Gas Company (SoCal Gas) and the Center for Sustainable Energy® (CSE). CSE administers the program for SDG&E customers.

SGIP Handbook Streamlining



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Questions?





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General Workshop Q & A





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Thank You

