



SELF-GENERATION
INCENTIVE PROGRAM

SGIP 3rd Quarterly Workshop of 2025

July 28, 2025





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Welcome and Introductions

Julio Robles, SoCalGas



Introduction



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PROGRAM ADMINISTRATORS

SCE:

- Jim Stevenson
- Vicky Velazquez

SoCalGas:

- Julio Robles
- Laura Diaz
- Adrian Martinez
- Ashley Pezikian
- Jan Santos
- Sandi Linares-Plimpton

PG&E:

- Ron Moreno
- Mary Magdanz

CSE:

- Shalene Pierce
- Dema Tzamaras
- Jess Hilton
- Lupe Knox

LADWP:

- Christian Kroupa
- Narek Abcarian
- Stephanie Macoritto
- Eric Escamilla
- Natalie Benavidez
- Samer Fakhro

Introduction (continued)



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AESC (Technical)

- Dara Salour
- Stephanie Raya

Energy Division (CPUC)

- Gabriel Petlin
- Maya Noesen



Agenda



- 9:00 **Welcome, Introductions** (*Julio Robles, SoCalGas*)
- 9:05 **Teams Meeting Information and Safety Message** (*Julio Robles, SoCalGas*)
- 9:10 **Program Metrics** (*Jim Stevenson, SCE*)
- 9:30 **Regulatory Update** (*Ron Moreno, PG&E*)
- 10:00 **Third-Party Owner Consumer Protections Discussion** (*Laura Diaz, SoCalGas*)
- 10:30 **Residential Solar and Storage Equity Budget Opening** (*Dema Tzamaras, CSE*)
- 11:15 **3rd Quarter SGIP Workshop Q&A** (*Julio Robles, SoCalGas*)
- 12:00 **Conclude 3rd Quarter SGIP Workshop**

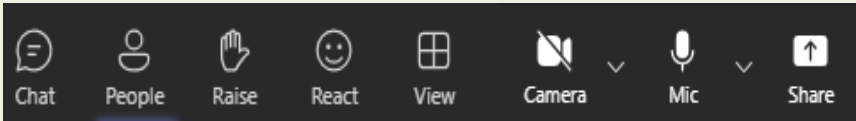

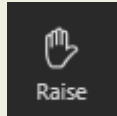
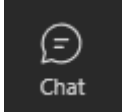


Teams Meeting Information and Safety Message

Julio Robles, SoCalGas

Teams Meeting



Function	Teams Icon
Controls	 A horizontal bar containing icons for Chat, People, Raise, React, View, Camera, Mic, and Share.
Mute – <i>Remain muted unless called on</i>	 A microphone icon with a slash through it and a dropdown arrow, labeled "Mic".
Raise Your Hand – <i>Wait until you are confirmed to speak on the chat or host</i>	 A hand icon with the palm facing up, labeled "Raise".
Type Your Question or Comment	 A speech bubble icon with an equals sign inside, labeled "Chat".



Safety Message



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Excessive Heat Awareness

- **Hydrate**
 - Adequate hydration reduces the chances of heat exhaustion and heat stroke. It is suggested to drinking 8 ounces of water every 15-20 minutes, totaling 32 ounces per hour.
 - Drink electrolytes if you are feeling dehydrated.
 - Avoid drinking caffeinated drinks.
- **Take Micro Breaks**
 - Performing strenuous work throughout the day may require short micro breaks to allow the body to rest and recuperate. During high-heat events, these micro breaks may need to be more frequent to prevent heat-related injuries.
 - Inform a colleague if you are experiencing signs/symptoms of heat illness.
- **Call It A Day**
 - Stop what you are doing, find shade or a cool place, rest and continue to hydrate.





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Program Metrics

Jim Stevenson, SCE

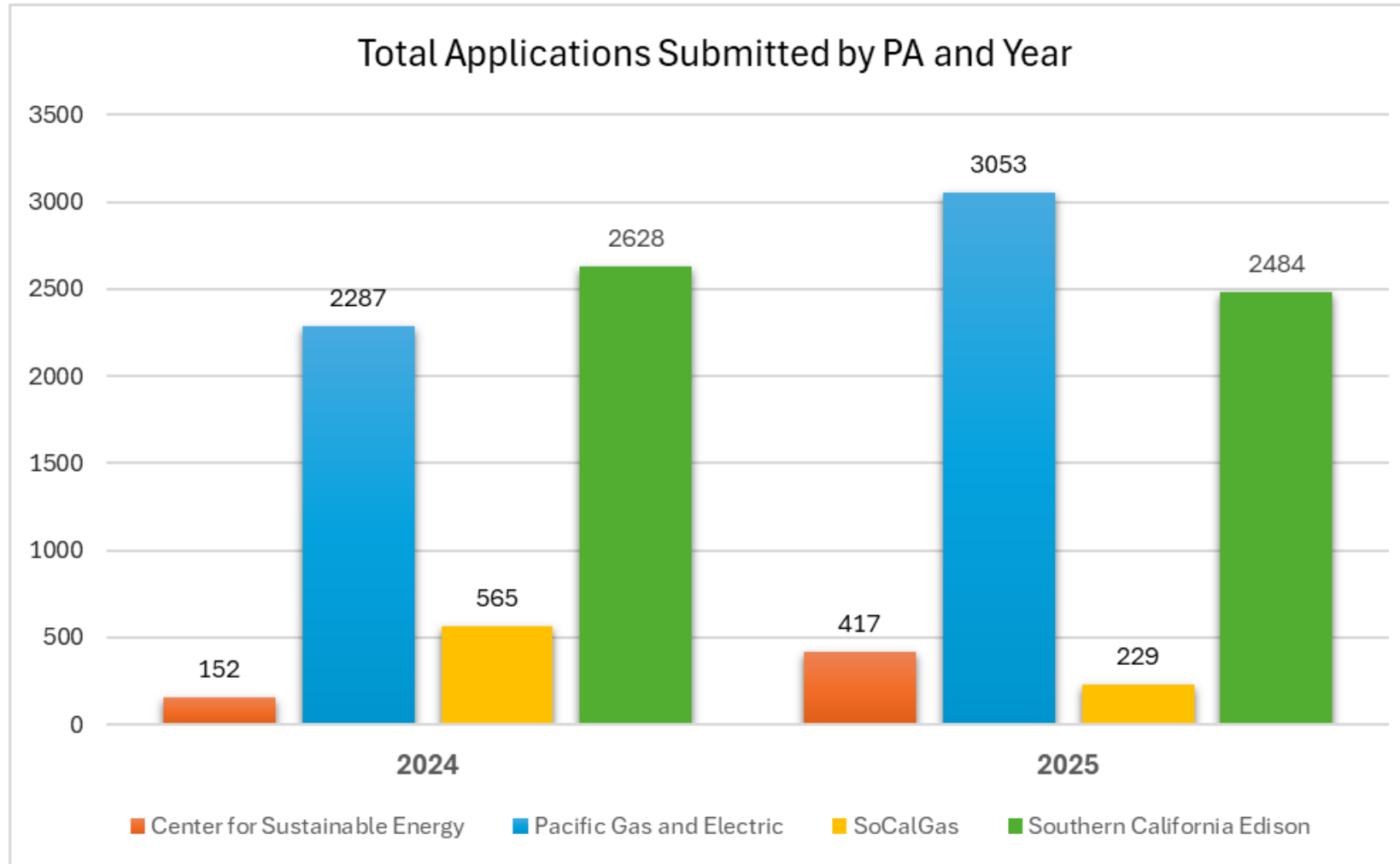


Program Metrics

Data 2024 – July 14, 2025



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Does not include cancellations and waitlist projects

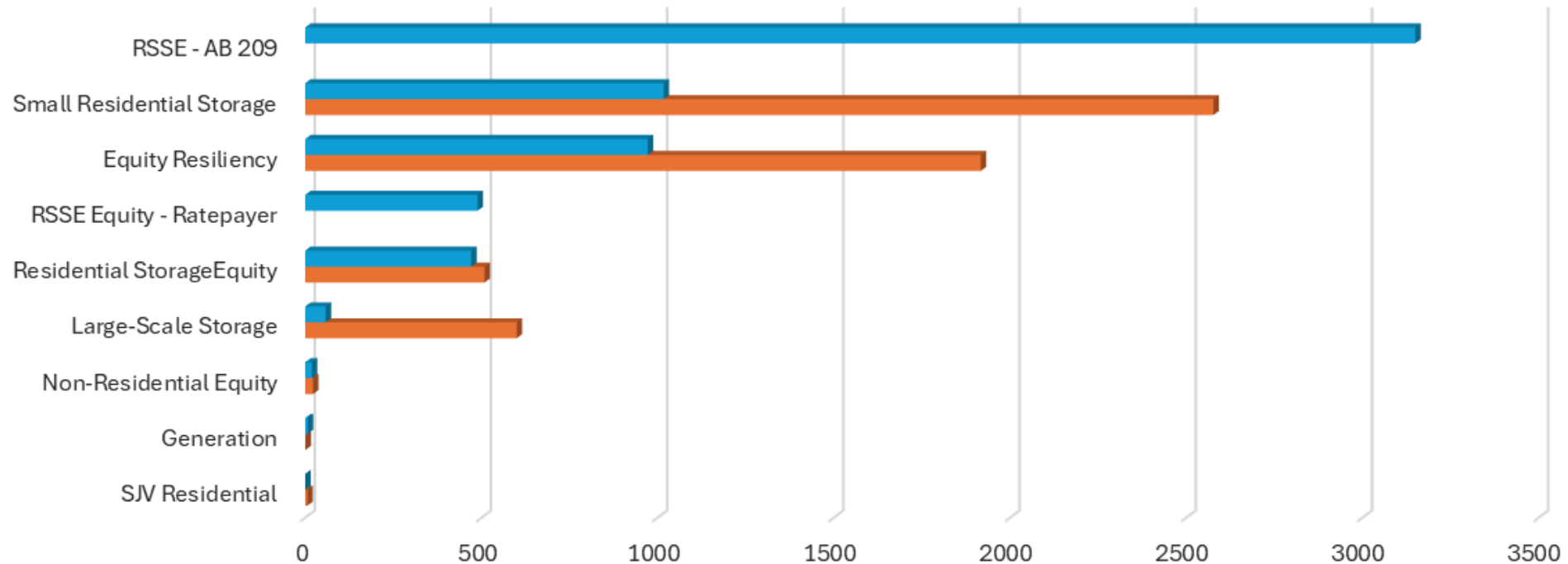
Program Metrics

Data 2024 – July 14, 2025



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Total Applications by Budget Category and Year



	SJV Residential	Generation	Non-Residential Equity	Large-Scale Storage	Residential StorageEquity	RSSE Equity - Ratepayer	Equity Resiliency	Small Residential Storage	RSSE - AB 209
■ 2025	0	7	19	58	471	489	972	1017	3150
■ 2024	6	1	22	600	509		1917	2577	

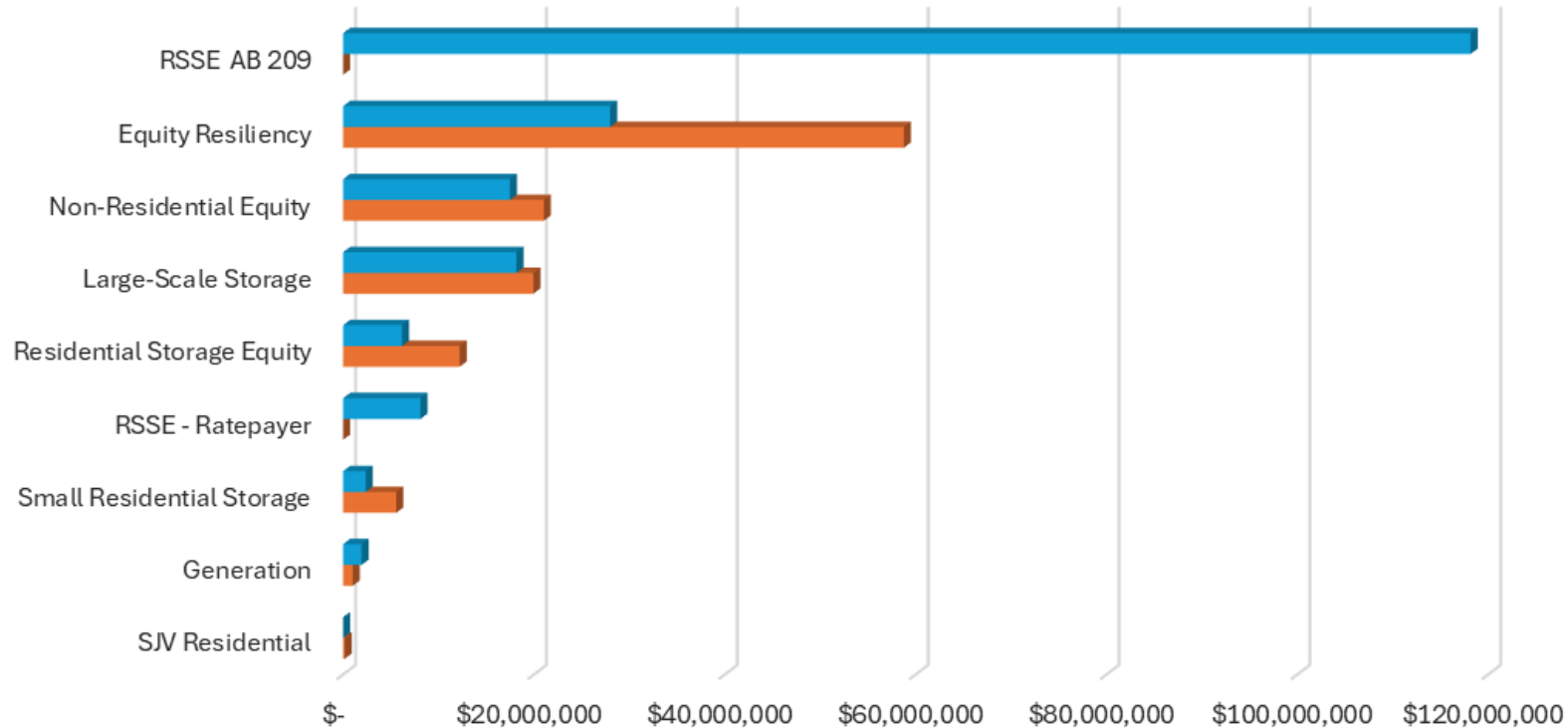
Program Metrics

Data 2024 – July 14, 2025



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Total Incentive Dollars by Budget Category



	SJV Residential	Generation	Small Residential Storage	RSSE - Ratepayer	Residential Storage Equity	Large-Scale Storage	Non-Residential Equity	Equity Resiliency	RSSE AB 209
2025	\$-	\$1,927,413	\$2,360,538	\$8,093,599	\$6,167,214	\$18,149,942	\$17,468,188	\$27,974,913	\$118,155,500
2024	\$158,400	\$1,000,000	\$5,564,407	\$-	\$12,201,748	\$19,919,432	\$21,021,368	\$58,748,836	\$-

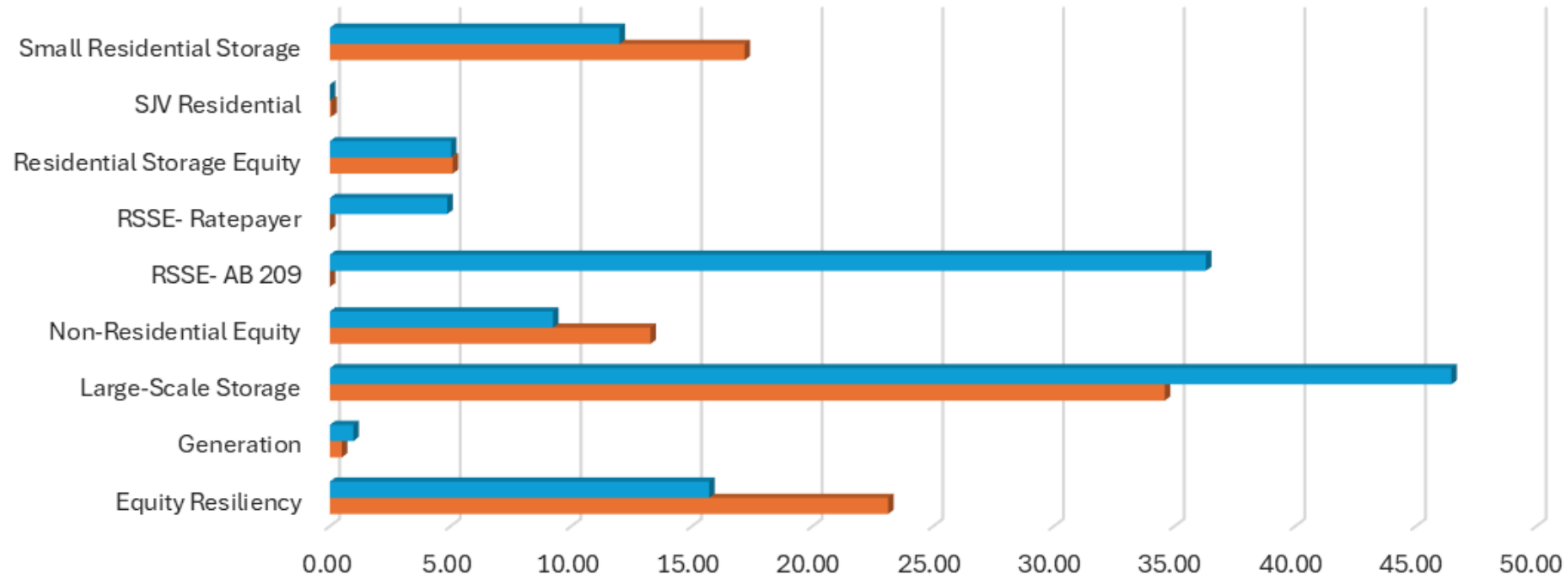
Program Metrics

Data 2024 – July 14, 2025



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Total Storage Rated Capacity (MW) by Budget Category



	Equity Resiliency	Generation	Large-Scale Storage	Non-Residential Equity	RSSE- AB 209	RSSE- Ratepayer	Residential Storage Equity	SJV Residential	Small Residential Storage
■ 2025	15.72	0.97	46.47	9.25	36.30	4.86	5.02	0	12.01
■ 2024	23.13	0.50	34.60	13.29	0	0	5.09	0.06	17.19

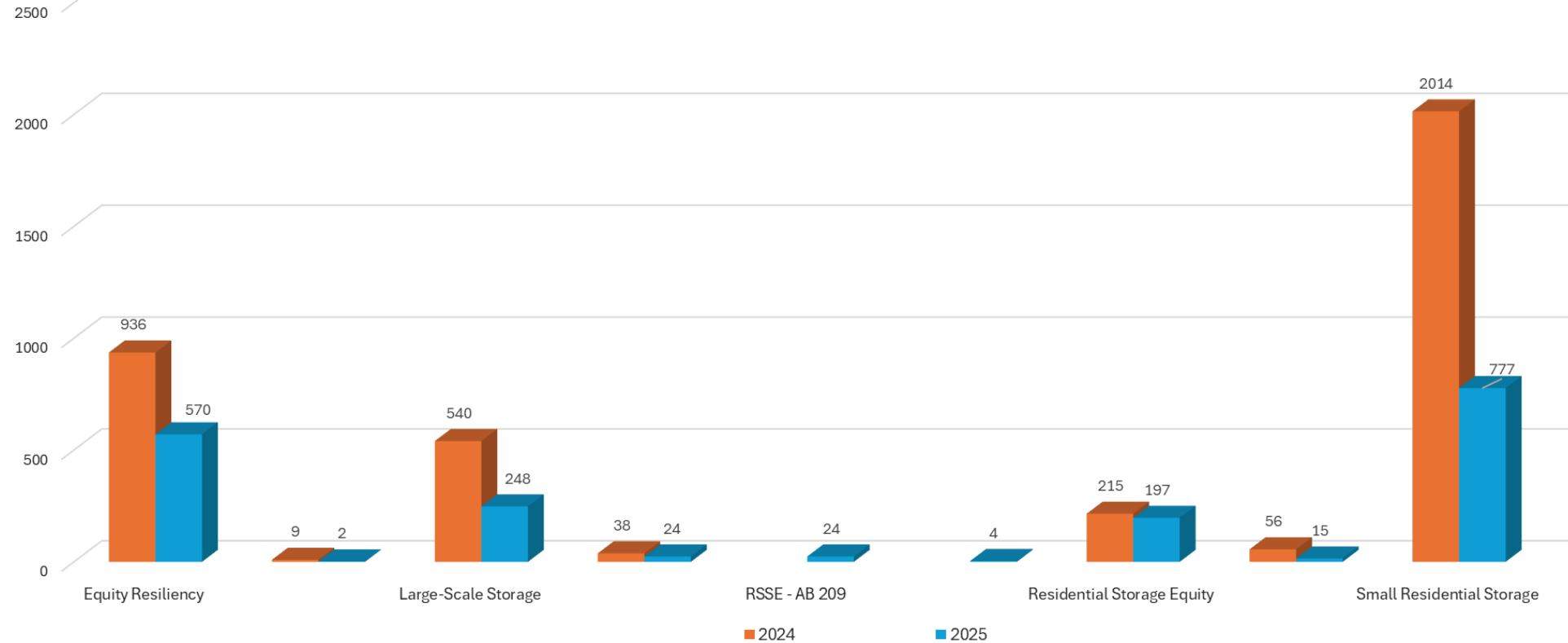
Program Metrics

Data 2024 – July 14, 2025



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Cancellations by Year



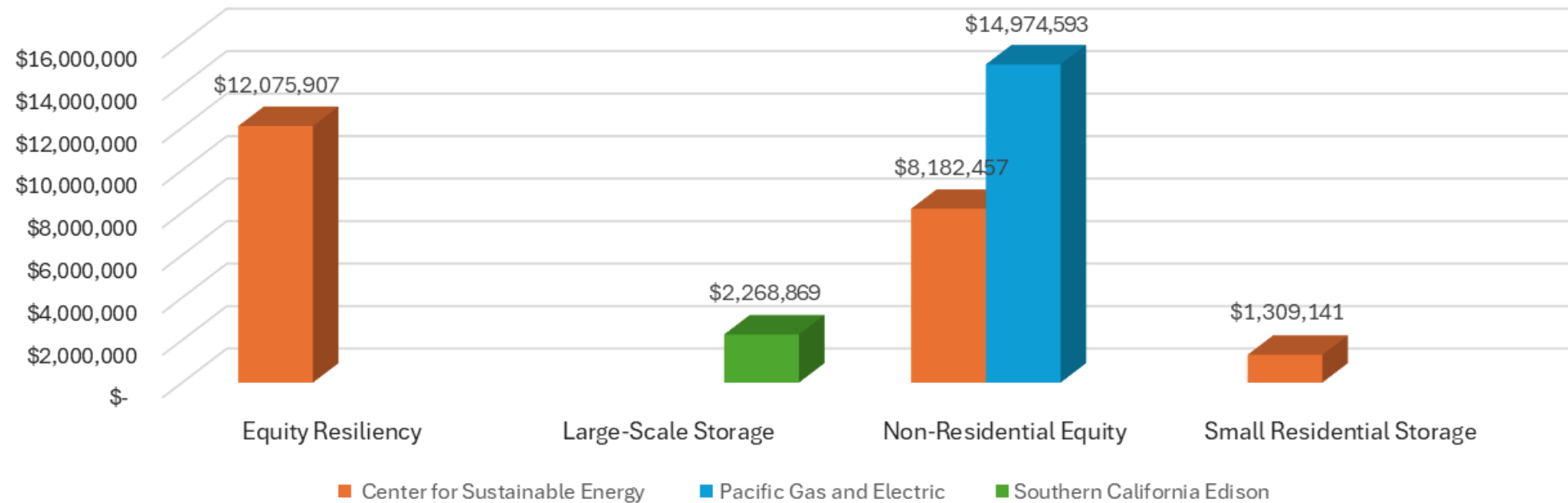
Program Metrics

Data 2024 – July 14, 2025



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Waitlist



Program Metrics

As of July 15, 2025



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Budget Category	CSE	SCE	SCG	PG&E
Large-Scale Storage	Will open soon	Waitlist	Step 5	Step 5
	\$553,488		\$2,718,819	\$3,309,955
Small Residential Storage	Waitlist	Step 7	Step 7	Step 7
		\$1,747,646	\$1,335,283	\$2,488,466
Residential Solar and Storage Equity - Ratepayer	Open	Open	Close	Open
	\$616	\$12,517		\$3,900,029
Residential Solar and Storage Equity - AB 209	Open	Open	Closed	Open
	\$11,899,322	\$48,132,227		\$38,227,086
Non-Residential Storage Equity	Waitlist	Open	Open	Waitlist
		\$8,143,553	\$1,226,406	
Equity Resiliency	Waitlist	Open	Open	Open
		\$15,766,363	\$3,724,274	\$13,280,357
San Joaquin Valley Residential		Open		Open
		\$4,589,600		\$1,210,400
San Joaquin Valley Non-Residential		Open		Closed
		\$120,000		
Generation	Open	Open	Open	Open
	\$1,600,884	\$36,725,083	\$12,284,568	\$17,243,065

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

Program Metrics



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Questions?



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Regulatory Update

Ron Moreno, PG&E



Regulatory Update



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Demand Response ACTIVE REGULATORY FILINGS STATUS

REGULATORY ITEMS	SUBMITTED	STATUS
Clarification of Low-Income and VNEM Demand Response Participation (5072-G/7611-E; SCE Advice 5661-E; CSE Advice 166-E)	June 4	Suspended
Update the Capacity Bidding Program to Enable Participation of Residential Customers (PG&E Advice 7458-E)	December 20, 2024	Suspended
Add PG&E’s Automated Response Technology Demand Response Program (PG&E Advice 7577-E-A)	April 22 Supplemental submitted April 30	Approved
Add Peninsula Clean Energy’s Demand Response Programs (PCE Advice 41-E)	March 27	Rejected



Regulatory Update



Demand Response ACTIVE REGULATORY FILINGS STATUS

REGULATORY ITEMS	SUBMITTED	STATUS
Add Marin Clean Energy's Peak Flex Market Demand Response Program (PGE Advice 5491-E)	January 17	Rejected
Add Clean Power Alliance's DR Programs (SCE Advice 5500-E-A)	March 12 Supplemental submitted on March 28	Rejected
Add CalChoice's Critical Peak Pricing Demand Response Program (SCE Advice 5491-E)	March 4	Rejected
Add San Diego Community Powers's Solar Battery Savings Demand Response Program (CSE Advice 165-E)	May 30	Rejected
Add Clean Energy Alliance's PeakSmart Savers Demand Response Program (CEA Advice 12-E)	May 15	Pending

Regulatory Update



Administrative Law Judge (ALJ) Ruling on SGIP's Close-out

- Released April 28
- Asks various questions regarding close-out procedures for ratepayer and GGRF funds and M&E activities
- Opening Comments were submitted May 12; Reply Comments were submitted May 19

Assigned Commissioner's Ruling (ACR) on SGIP's Demand Response Requirement for RSSE Customers

- Released on July 7
- Asks "Should the Commission remove the DR requirement for all residential low-income customers applying to the Residential Solar and Storage Equity budget?"
- Comments were submitted on July 15

H.R.1 “One Big Beautiful Bill”



H.R.1 changes the ITC structure for residential and non-residential solar and storage systems

Summary of ITC changes effecting SGIP

- Residential Tax Credit set to end December 2025 for both solar and storage projects.
- Non-Residential Tax Credit – Construction must begin by 7/4/2026 or be placed in service by 12/31/2027.
 - Also applicable to TPO Residential projects.
- ITC cannot be paid if system is from a Foreign Entity for any residential TPO and non-residential projects that begin construction after 12/31/2025.

Resolution E-5373, Ordering Paragraph 10, requires the SGIP PAs to file and Advice Letter within 21 days of learning about a material change to the investment tax credit

On 7/21/25, the SGIP PAs filed an extension to request an additional 45 days, to allow for appropriate review and coordination across the SGIP PAs, and to ensure the necessary SGIP changes are implemented accurately and consistently.

Regulatory Update



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Third-Party Owner Consumer Protections Discussion

Laura Diaz, SoCalGas



Third-Party Owner Consumer Protections



Background

- Third-Party Ownership (TPO) arrangements have historically existed in CPUC customer programs, including SGIP
- In 2015, Resolution E-4719 adopted a TPO model and outlined the minimum standards required as consumer protections
- With the success of the TPO model in SASH, when DAC-SASH was launched in 2018, also adopted the SASH TPO framework, currently in use today
- AB 209 directives were implemented into SGIP starting in 2023
- Specifically, Resolution E-5373 approved the SGIP PAs AL implementing IRA tax credit modifications to help leverage federal investment credits within SGIP and was also directed to explore the adoption of consumer protections:
 - Ordering Paragraph 11: *SGIP PAs shall hold a workshop to discuss whether to require the TPO consumer protection requirements established in D.15-01-027 OP 18 in SGIP. The SGIP PAs shall file a Tier 2 Advice Letter within six months determining whether and what TPO consumer protections should be in SGIP.*
- This TPO workshop was held on May 9, 2025 and PAs received helpful feedback from stakeholders
- The SGIP PAs are currently finalizing the AL, which will be submitted by August 20, 2025

Third-Party Owner Consumer Protections



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Differing Program Aspects Identified:

- Program Administrator role
- System ownership and application types
- Approved TPO Partner
- Financing options
- PPAs
- Incentive payment pay-out
- Technologies incentivized

Third-Party Owner Consumer Protections



DAC-SASH TPO Consumer Protections:

- 1) Ensure the Program customers receive at least 50 percent of the savings, as compared to standard IOU rates, from the PV generating and storage equipment;
- 2) Reduce or eliminate barriers for customers with poor credit (low FICO score) to qualify and participate;
- 3) Address concerns that homeowners may have about moving or selling their home during the TPO contract term;
- 4) Cover maintenance, operations, inverter replacement, and monitoring;
- 5) Prohibit liens on homes;
- 6) Minimize the risk to the low-income customers that the system would be removed for delinquent payments;
- 7) Ensure that all costs are apparent and upfront and that there is no risk that the TPO deal would result in an additional financial burden to the customer;
- 8) Standardize financial terms for low-income customers where possible;
- 9) Protect the customer against terms that could change after contract signing;
- 10) Require that TPO agreements note the potential for additional costs associated with the contract, if applicable;
- 11) Require the TPO provider to clearly explain that rate changes will affect the economies of a PPA;
- 12) Require that TPO agreement provisions spell out what happens in the event that the financing company defaults.

PROPOSED SGIP TPO Consumer Protections:*

- 1) Cover maintenance (includes but not limited to system support, problem diagnosis, on-site repair, and preventative maintenance), operations, inverter replacement, and monitoring;
- 2) Ensure that all costs are apparent and upfront and that there is no risk that the TPO deal would result in an additional financial burden to the customer;
- 3) Protect the customer against terms that could change after contract signing;
- 4) Require that TPO agreements note the potential for additional costs associated with the contract, if applicable;
- 5) Require the TPO provider to clearly explain that rate changes will affect the economies of a PPA;
- 6) Require that TPO agreement provisions spell out what happens in the event that the financing company defaults.
- 7) Ensure the TPO can transfer ownership of the incentivized SGIP system to the Host Customer at no additional cost.

**list subject to change*

Third-Party Owner Consumer Protections



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Residential Solar and Storage Equity (RSSE) Budget Opening

Dema Tzamaras, CSE



Residential Solar and Storage Equity (RSSE) Budget Opening



Improve SGIP Program Equity Outcomes

The Residential Solar and Storage Equity budget was established in CPUC Decision (D.) 24-03-071. The Decision allocated \$280 million from the Greenhouse Gas Reduction Fund to provide the framework for RSSE, improve eligibility requirements, and administration of the program.

- RSSE funding is available to all residential low-income customers in California receiving electric service from a load serving entity (LSE).
 - Low-Income is defined as a household income of 80% area median income or less
 - LSEs include Investor Owned Utilities (IOUs), Community Choice Aggregators (CCAs), Publicly Owned Utilities (POUs), Municipalities, and Rural Electric Cooperatives

Reintegration of Solar

- Eligible customers can now receive an incentive for new solar photovoltaic systems when paired with an energy storage system.
- Solar plus storage incentives are only available for applications receiving funding from Assembly Bill (AB) 209.

RSSE Budget Available Funding



Program Administrator	AB209 Incentive Allocation	Tribal Carveout (2%)
PG&E	\$99,000,000	\$1,980,000
SCE	\$87,300,000	\$1,746,000
LADWP	\$32,400,000	\$648,000
CSE	\$19,800,000	\$396,000
SCG	\$13,500,000	\$270,000
Statewide Total	\$252,000,000	\$5,040,000

- SGIP PAs are directed to reserve 2% of their AB209 incentive budgets for tribal customers.
- Funds set-aside for tribal customers that remain unencumbered in the final 12 months of the program shall be made available to any eligible customer

Understanding the RSSE Incentives



Standalone Storage Incentive \$1.10/Wh

Storage Sizing

- Storage paired with solar generation is sized to the average daily excess solar generation in a summer calendar month
- Standalone storage is sized to the average daily energy consumption during 4-9pm during a summer calendar month

Single Family homes can have a maximum storage size of 30 kWh (approx. \$33,000)

Systems over 15 kWh (approx. \$16,500) require load justification

Solar + Storage Incentive \$3.10/W + \$1.10/Wh

Solar Sizing

- Solar is sized to 100% of the customer's annual on-site load
- Standalone Solar is not eligible for an incentive. Solar purchase must be bundled with a storage purchase

Solar PV can be sized up to 150% of the customer's onsite load if sizing for future load growth

Systems over 5 kW (approx. \$15,500) require load justification

RSSE Budget Requirements



Income Verification

- Household Income must be 80% AMI or less



Demand Response

- Required to enroll in an SGIP eligible DR Program for 10 years



Investment Tax Credit

- Applications are defaulted to a 30% ITC
- Customers can self-own or participate through TPO

RSSE Income Verification Process



Verification Documents

Host Customers must provide documentation showing their household income is 80% of the area median income* or less based on a copy of their most recently available federal tax documents.

- Not all customers file taxes
- Previously accepted documents include: IRS 1040, W-2, 1099, Bank Statements, Pay Stubs, and Social Security Letters

Categorical Eligibility

Customers who have **completed income-verification** as a result of participation in the SASH, DAC-SASH, CARE, FERA, ESA, MASH, or SOMAH programs can qualify under categorical eligibility.

- CARE and FERA do not require income verification to participate. Make sure to verify before applying.

*Area Median Income is subject to annual changes based upon Housing and Urban Development's income guidelines (<https://www.huduser.gov/portal/datasets/il.html>).

** Please work with your respective PA to verify income if your host customer was not previously required to file federal taxes.

RSSE Demand Response Requirements



Investor Owned Utility Customers

A list of available SGIP Approved DR programs can be found under the Resources tab on selfgenca.com.

https://www.selfgenca.com/home/resources/demand_response/

Community Choice Aggregator Customers

The Commission has established that CCA customers are to be handled in the same manner as IOU customers. At this time, there are no SGIP approved DR programs available to CCA customers.

Non-Investor Owned Utility Customers

At this time, there are no SGIP approved DR programs available to non-IOU customers. Because these customers do not have access to a DR program, they are exempt from this requirement.

RSSE and the ITC



Incentive Funding Source	System Owner	ITC Requirement	Exemption Process to claim 0%
Ratepayer Collections	Host Customer	1-30%	Documentation demonstrating why: <ul style="list-style-type: none"> - The host customer is ineligible to receive the IRA tax credit, and - Why the credit could not otherwise be utilized or transferred by a third-party entity
	Third-Party Ownership	30-70%	No Exemption Pathways
AB209 Budget/ GGRF Funds	Host Customer	30%	Documentation demonstrating why: <ul style="list-style-type: none"> - The host customer is ineligible to receive the IRA tax credit, and - Why the credit could not otherwise be utilized or transferred by a third-party entity
	Third-Party Ownership	30-70%	No Exemption Pathways

More about RSSE and the ITC



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IRS Classifications

- Incentive funding from ratepayer collections are considered **Public Utility Subsidies**. Because of this, SGIP incentives are subtracted from qualified expenses when claiming the ITC.
- Incentive funding from AB209 are considered **State Energy Efficiency Incentives**, which are generally not subtracted from qualified costs.
- The SGIP PAs encourage program participants to consult a tax professional to address questions relating to their finances.

RSSE Developers



Number of Projects by Developer:

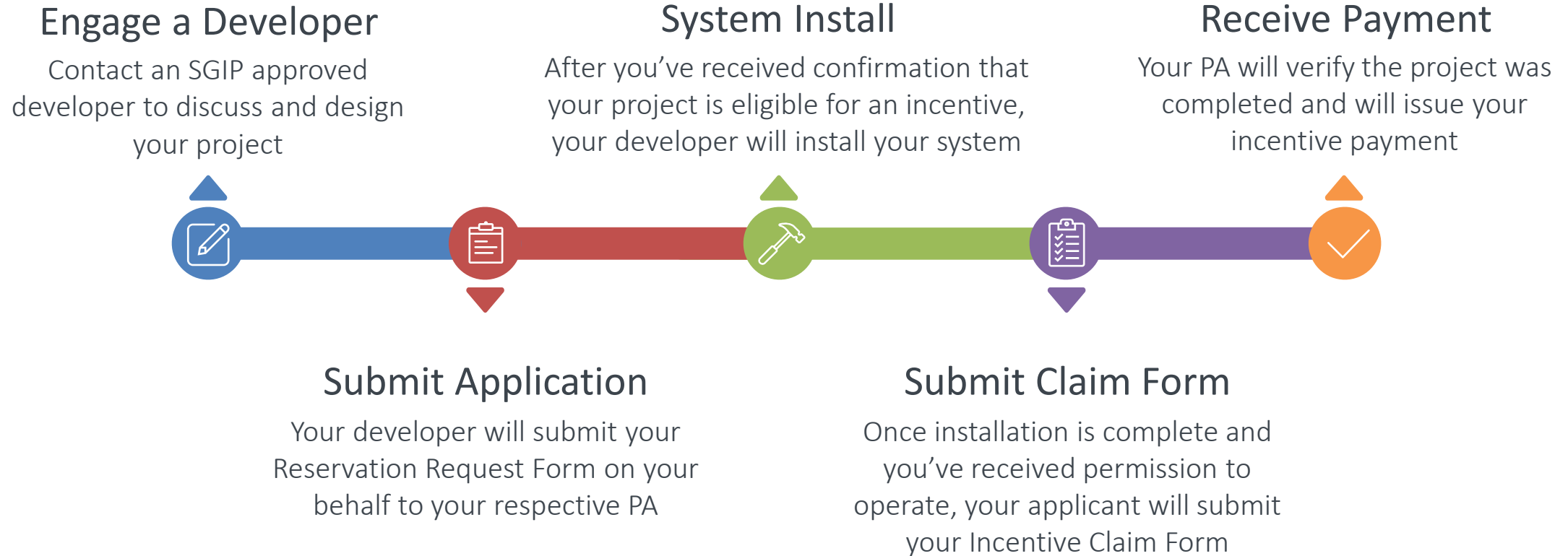
Haven Energy Services, Inc – 598
 GRID Alternatives – 181
 Apollo Home Power LLC – 171
 Sunrun Installation Services – 134
 Solar Optimum, Inc – 120

Number of Projects Participating in APP:

SolarMax Renewable Energy Provider, Inc. – 69
 Haven Energy Services, Inc – 58
 Hooked on Solar – 43
 Vital Energy Consulting, Staffing & Logistics, LLC DBA
 Vital Energy Solar – 41

Row Labels	Count of Developer Company Name	Sum of Current Incentive (\$)	Count of Advance Payment Program (AB 209)
Haven Energy Services, Inc	598	\$ 19,306,081.23	58
GRID Alternatives	181	\$ 2,700,499.84	
Apollo Home Power LLC	171	\$ 2,821,500.00	
Sunrun Installation Services	134	\$ 26,742,374.11	
Solar Optimum, Inc.	120	\$ 4,072,110.01	
SolarMax Renewable Energy Provider, Inc.	93	\$ 2,619,033.86	69
Store Energy LLC	84	\$ 1,820,728.84	
Nanofy of California Llc	79	\$ 1,988,250.17	
PE Operations LLC	60	\$ 1,896,153.15	
Hooked on Solar	55	\$ 1,275,379.38	43
Vital Energy Consulting, Staffing & Logistics, LLC DBA Vital Energy Solar	41	\$ 1,467,016.74	41
LA Solar Group	32	\$ 914,527.07	
ES Solar LLC	28	\$ 912,822.65	
SolarTech Energy, Inc.	18	\$ 426,684.84	18
Advanced Conservation Systems, Inc.	13	\$ 438,133.97	11
Ally Electric And Solar Inc	12	\$ 522,667.60	
Current Energy, LLC	11	\$ 245,366.94	
Buildings And Construction By Bodde: dba Incentive Electric	10	\$ 455,960.23	

RSSE Application Process



The list of SGIP approved developers can be found on the resources page on [selfgenca.com](https://www.selfgenca.com) SGIP Developer Eligibility Application

<https://www.selfgenca.com/documents/developer/approved>

SoCalGas RSSE Lottery



What occurred when the RSSE budget opened?

The RSSE budget was temporarily closed only in SoCalGas territory on June 3, 2025 because SoCalGas received reservation requests for the RSSE AB 209 budget in excess of funds available for non-tribal customers on the first day of application submissions. This resulted in some projects receiving a 'Rejected' notice when funding was no longer available.

How was this corrected?

To address this, SoCalGas conducted a lottery for all RSSE AB 209 applications that were assigned a status of 'RRF Submitted' or 'RRF Rejected' on June 3, 2025. Following the lottery selection process, those projects not selected for funding were placed onto a waitlist in the order in which they were received.

SoCalGas reviewed the results of the lottery, including communicating with the straddler application. SoCalGas is expected to process the results of the lottery within the coming weeks. Applications selected for funding will get the 'RRF Submitted Notification' email communication and projects not selected for funding will be placed in a Waitlist status.

What will happen moving forward?

Any new project submitted after the lottery will be placed on the Waitlist in the order received.

Residential Solar and Storage Equity Budget Opening



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Questions?



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Q & A

(Open now for all topics)





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Thank You



SGIP PA Contacts



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