



SELF-GENERATION
INCENTIVE PROGRAM

SGIP 4th Quarterly Workshop of 2025

December 12, 2025



Los Angeles
Department of
Water & Power



SOUTHERN CALIFORNIA
EDISON
An EDISON INTERNATIONAL® Company



*Pacific Gas and
Electric Company*®



SoCalGas



Center for
Sustainable
Energy®



SELF-GENERATION
INCENTIVE PROGRAM

Welcome and Introductions

Shalene Pierce, Center for Sustainable Energy



Introduction



SELF-GENERATION
INCENTIVE PROGRAM

PROGRAM ADMINISTRATORS

SCE:

- Vicky Velazquez
- Adriana Sepulveda

SoCalGas:

- Julio Robles
- Laura Diaz
- Adrian Martinez
- Ashley Pezikian
- Jan Santos

PG&E:

- Ron Moreno
- Tiffanie Gulley

CSE:

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

LADWP:

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

Introduction (continued)



SELF-GENERATION
INCENTIVE PROGRAM

AESC (Technical)

- Dara Salour
- Stephanie Raya

Energy Division (CPUC)

- Gabriel Petlin
- Maya Noesen

Verdant

- Brian McAuley
- William Marin



Agenda



SELF-GENERATION
INCENTIVE PROGRAM

- 9:00 **Welcome, Introductions** (*Shalene Pierce, CSE*)
- 9:05 **Teams Meeting Information and Safety Message** (*Shalene Pierce, CSE*)
- 9:10 **Program Metrics** (*Adriana Sepulveda, SCE*)
- 9:25 **Regulatory Update** (*Laura Diaz, SoCalGas*)
- 10:35 **SGIP Closeout Decision – Ratepayer** (*Lupe Knox, CSE*)
- 10:50 **SGIP Closeout Decision – AB209** (*Ron Moreno, PG&E*)
- 11:05 **Total Eligible Project Cost Breakdown Refresher** (*Ron Moreno, PG&E*)
- 11:15 **LADWP Opening** (*Stephanie Macoritto, LADWP*)
- 11:30 **Verdant M&E Update** (*Brian McAuley, Verdant*)
- 11:45 **4th Quarter SGIP Workshop Q&A** (*Shalene Pierce, CSE*)
- 12:30 **Conclude 4th Quarter SGIP Workshop**





SELF-GENERATION
INCENTIVE PROGRAM

Teams Meeting Information

Shalene Pierce, CSE



Teams Meeting



SELF-GENERATION
INCENTIVE PROGRAM

| 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 | |





SELF-GENERATION
INCENTIVE PROGRAM

Program Metrics

Adriana Sepulveda, SCE

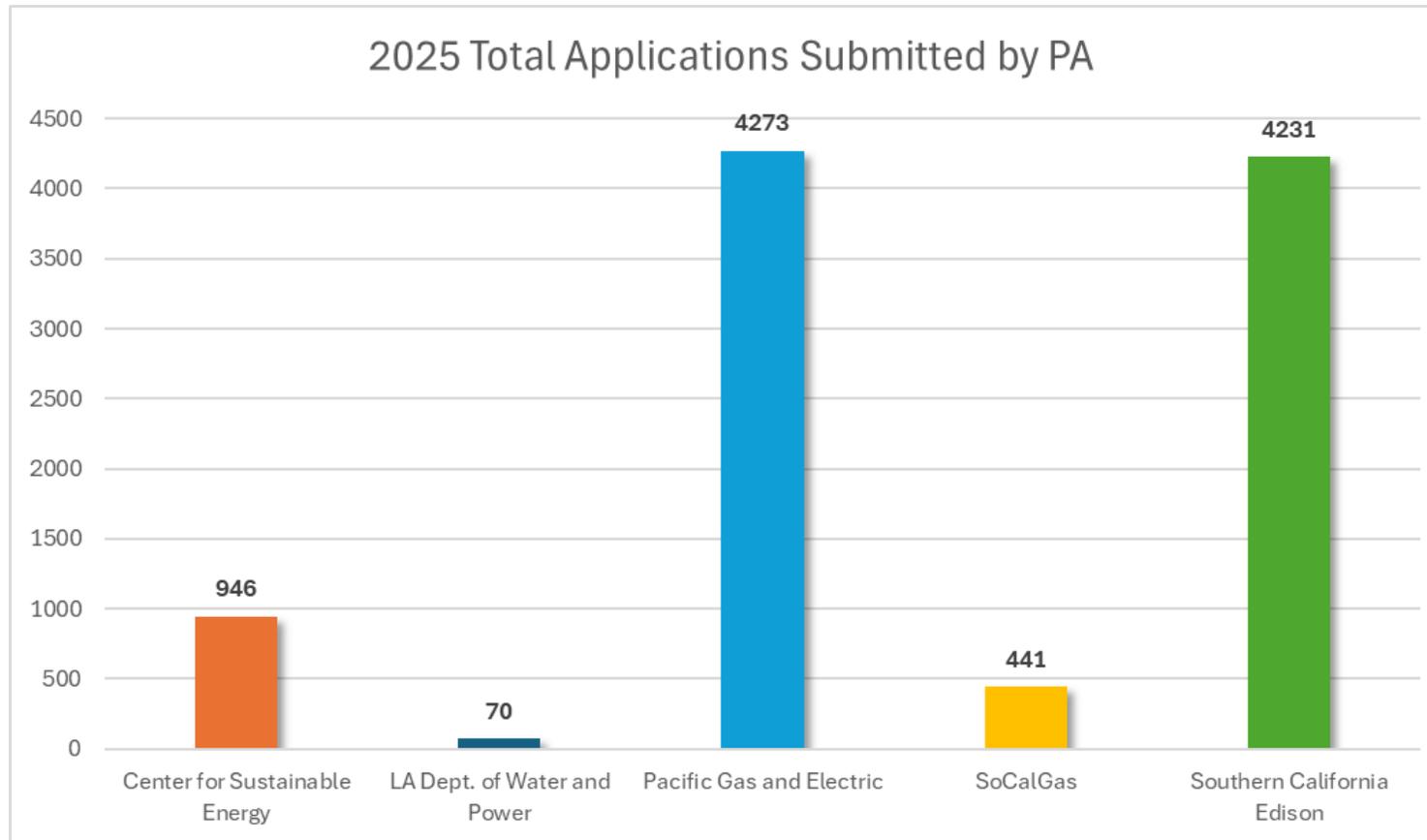


Program Metrics

Data Jan 2025 – Dec 9, 2025



SELF-GENERATION
INCENTIVE PROGRAM



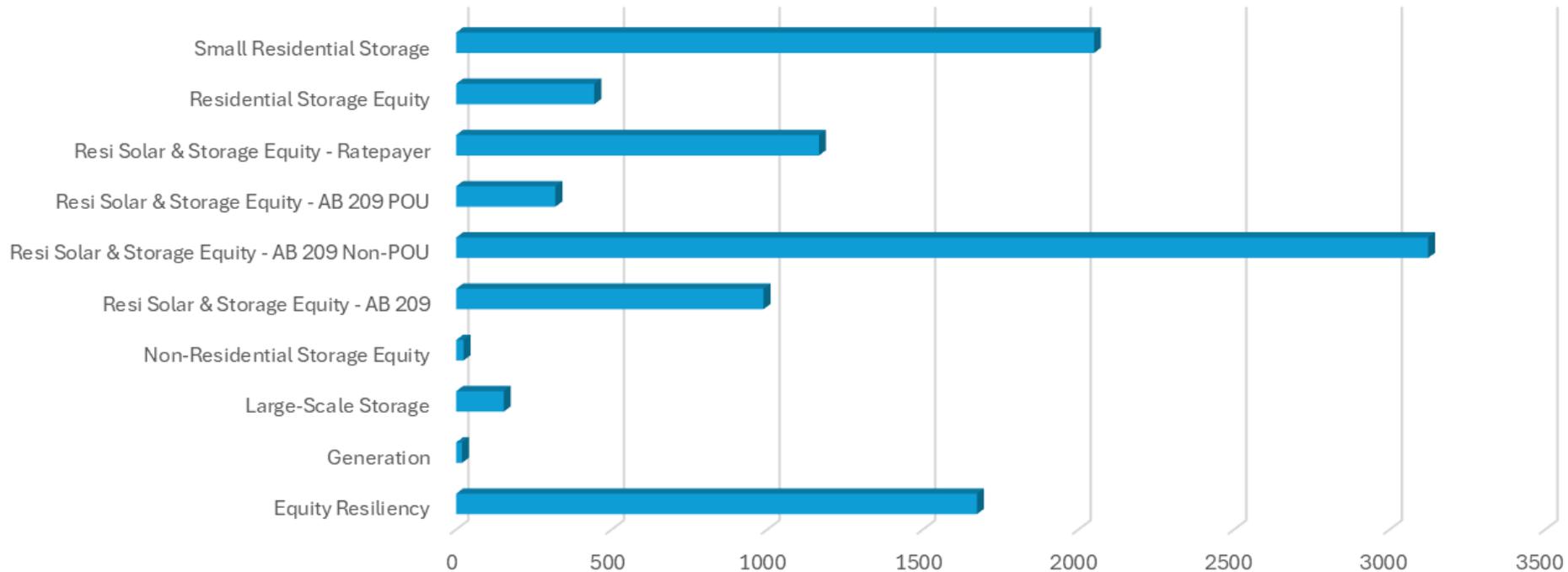
Program Metrics

Data Jan 2025 – Dec 9, 2025



SELF-GENERATION
INCENTIVE PROGRAM

2025 Total Applications by Budget Category



| | Equity Resiliency | Generation | Large-Scale Storage | Non-Residential Storage Equity | Resi Solar & Storage Equity - AB 209 | Resi Solar & Storage Equity - AB 209 Non-POU | Resi Solar & Storage Equity - AB 209 POU | Resi Solar & Storage Equity - Ratepayer | Residential Storage Equity | Small Residential Storage |
|-----------|-------------------|------------|---------------------|--------------------------------|--------------------------------------|--|--|---|----------------------------|---------------------------|
| ■ Series1 | 1674 | 19 | 153 | 24 | 988 | 3124 | 319 | 1166 | 444 | 2050 |



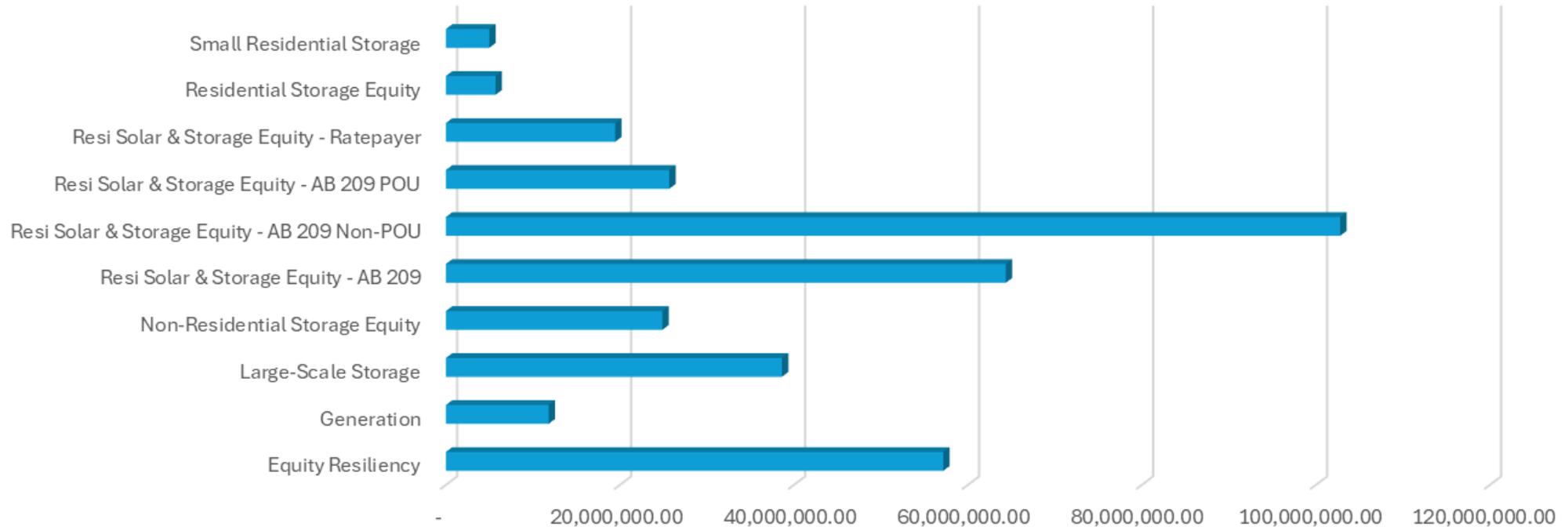
Program Metrics

Data Jan 2025 – Dec 9, 2025



SELF-GENERATION
INCENTIVE PROGRAM

2025 Total Incentive Dollars by Budget Category



| | Equity Resiliency | Generation | Large-Scale Storage | Non-Residential Storage Equity | Resi Solar & Storage Equity - AB 209 | Resi Solar & Storage Equity - AB 209 Non-POU | Resi Solar & Storage Equity - AB 209 POU | Resi Solar & Storage Equity - Ratepayer | Residential Storage Equity | Small Residential Storage |
|-----------|-------------------|--------------|---------------------|--------------------------------|--------------------------------------|--|--|---|----------------------------|---------------------------|
| ■ Series1 | 57,177,945.0 | 11,810,000.0 | 38,631,485.2 | 24,887,077.5 | 64,360,585.7 | 102,790,460.0 | 25,673,486.5 | 19,457,554.9 | 5,705,017.80 | 4,990,261.17 |

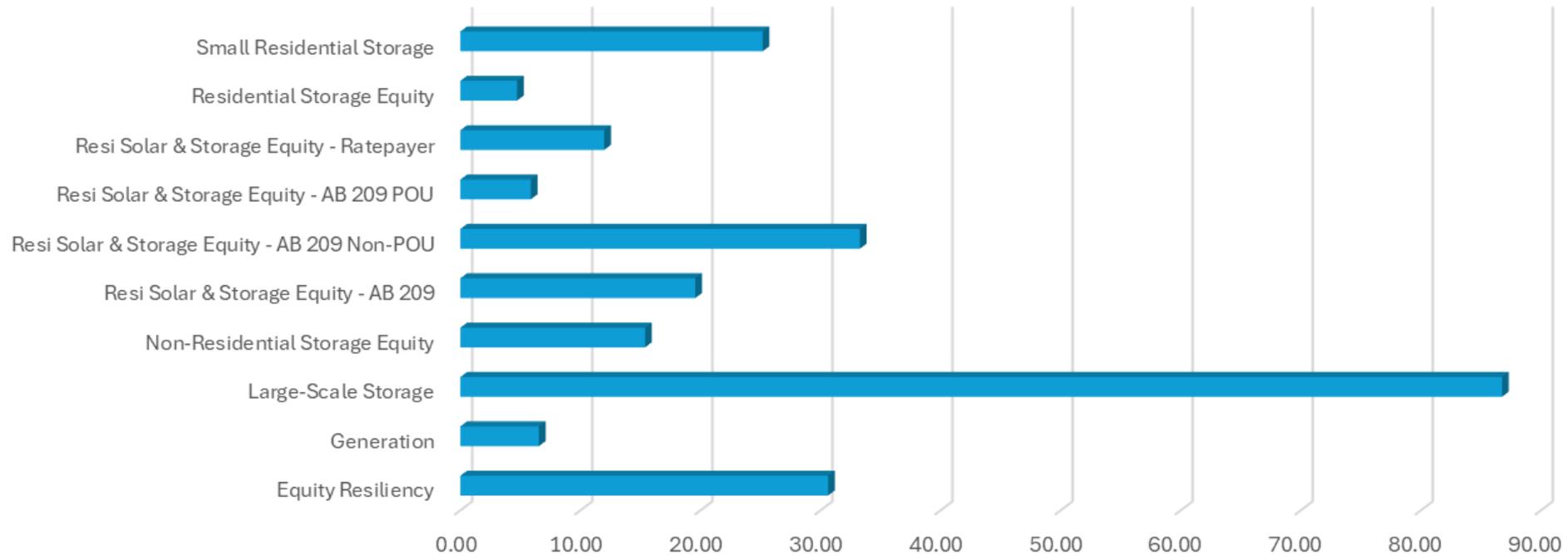
Program Metrics

Data Jan 2025 – Dec 9, 2025



SELF-GENERATION
INCENTIVE PROGRAM

2025 Total Storage Rated Capacity (MW) by Budget Category



| | Equity Resiliency | Generation | Large-Scale Storage | Non-Residential Storage Equity | Resi Solar & Storage Equity - AB 209 | Resi Solar & Storage Equity - AB 209 Non-POU | Resi Solar & Storage Equity - AB 209 POU | Resi Solar & Storage Equity - Ratepayer | Residential Storage Equity | Small Residential Storage |
|---------|-------------------|------------|---------------------|--------------------------------|--------------------------------------|--|--|---|----------------------------|---------------------------|
| Series1 | 30.63 | 6.54 | 86.76 | 15.38 | 19.56 | 33.27 | 5.87 | 11.98 | 4.72 | 25.18 |

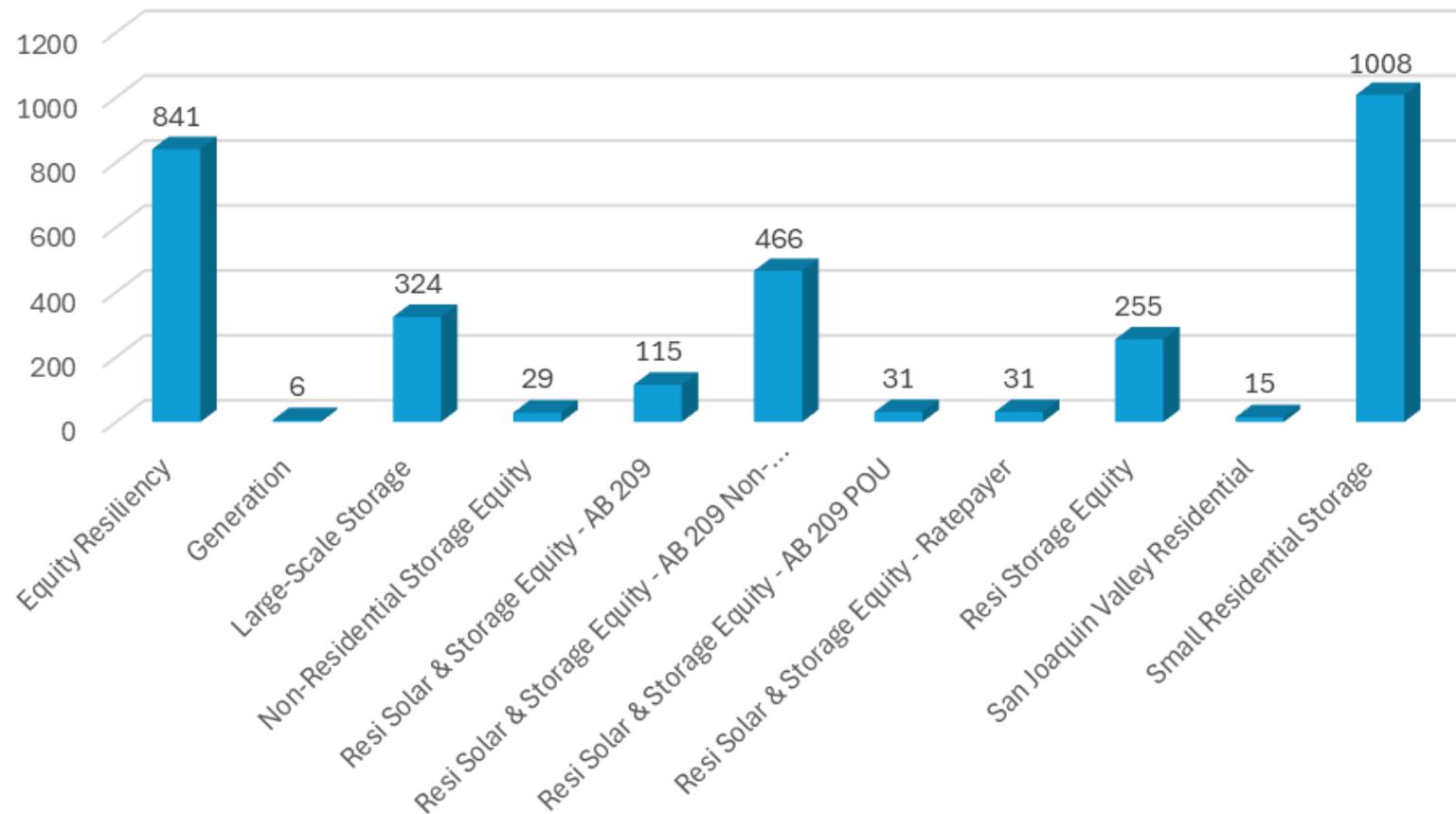
Program Metrics

Data Jan 2025 – Dec 9, 2025



SELF-GENERATION
INCENTIVE PROGRAM

2025 Cancellations



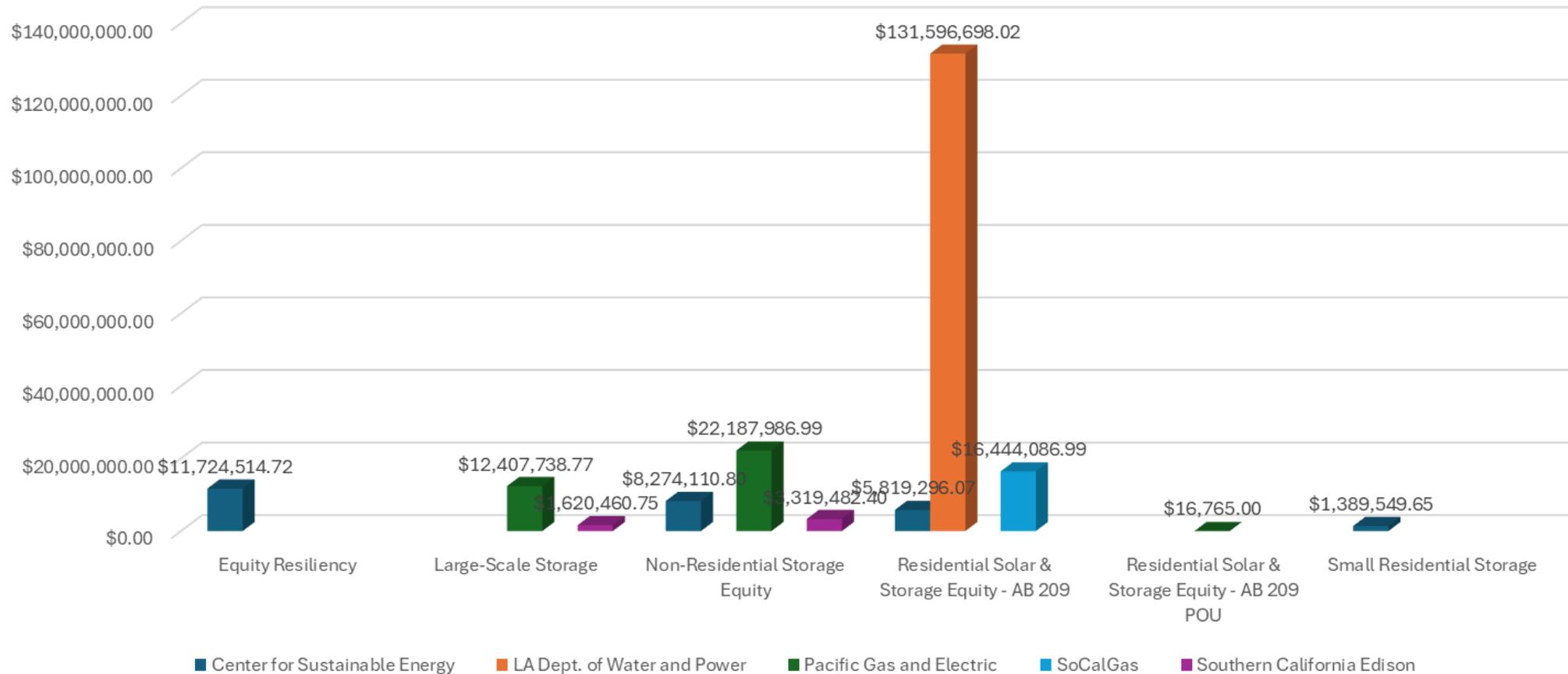
Program Metrics

Data Jan 2025 – Dec 9, 2025



SELF-GENERATION
INCENTIVE PROGRAM

Waitlist



<https://www.selfgenca.com/home/waitlist/>

Program Metrics

As of December 9, 2025



**SELF-GENERATION
INCENTIVE PROGRAM**

| Budget Category | CSE | SCE | SCG | PG&E | LADWP |
|--|-----------------|-----------------|-----------------|-----------------|-----------------|
| Large-Scale Storage | Step 5 | Waitlist | Step 5 | Waitlist | |
| | \$2,238,601.12 | \$271,417.75 | \$1,793,808.17 | \$28,631.54 | |
| Small Residential Storage | Waitlist | Step 7 | Step 7 | Step 7 | |
| | \$151,986.64 | \$1,010,898.32 | \$1,146,216.97 | \$1,119,915.64 | |
| Residential Solar and Storage Equity - Ratepayer | Step 6 | Step 6 | Step 6 | Step 6 | |
| | \$13,362.98 | \$245,989.20 | \$1,265,169.72 | \$918,603.01 | |
| Residential Solar and Storage Equity - AB 209 | Waitlist | | Waitlist | | Waitlist |
| | \$383,909.07 | | \$282,852.02 | | \$672,653.12 |
| Residential Solar and Storage Equity - AB 209 POU | | Step 6 | | Step 6 | |
| | | \$1,000,000.00 | | \$5,326,513.43 | |
| Residential Solar and Storage Equity - AB 209 Non-POU | | Closed | | Closed | |
| | | \$24,829,320.44 | | \$26,721,298.56 | |
| Non-Residential Storage Equity | Waitlist | Waitlist | Step 5 | Waitlist | |
| | \$1,279,343.02 | \$488,201.73 | \$1,075,760.83 | \$4,758,961.48 | |
| Equity Resiliency | Waitlist | Step 5 | Step 5 | Step 5 | |
| | \$1,496,684.41 | \$6,065,574.66 | \$275,163.96 | \$13,500,006.95 | |
| San Joaquin Valley Residential | | Closed | | Closed | |
| | | \$0.00 | | \$0.00 | |
| San Joaquin Valley Non-Residential | | Closed | | Closed | |
| | | \$0.00 | | \$0.00 | |
| Generation | Step 3 | Step 3 | Step 3 | Step 3 | |
| | \$1,152,883.63 | \$12,922,083.34 | \$12,770,567.73 | \$13,883,214.67 | |

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



SELF-GENERATION
INCENTIVE PROGRAM

Questions?



SELF-GENERATION
INCENTIVE PROGRAM

Regulatory Update

Laura Diaz, SoCalGas



Regulatory Update



Statewide Update: Changes to ITC treatment in SGIP

Draft Resolution E-5430

- Scheduled for Dec 18th CPUC Voting Meeting
- SoCalGas AL 6523, et al. submitted on August 20, 2025 – TPO Consumer Protections (Res. E-5373, OP 11)
 - OP 11: *SGIP PAs shall hold a workshop [held on May 9, 2025] 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.*
- SCE AL 5617, et al. submitted on August 27, 2025 – H.R. 1 Bill (Res. E-5373, OPs 8 & 10)
 - OP 10: *SGIP PAs are directed to file a Tier 2 Advice Letter within 21 days of learning of any material changes [passage of H.R. 1 Bill on July 4, 2025] to the tax credit to implement the needed handbook and database changes.*
 - OP 8: *SGIP PAs shall file a Tier 2 Advice Letter six months after the RSSE budget is opened [opened on June 2, 2025] to modify the IRA tax credit exemption criteria as needed.*



Regulatory Update



SELF-GENERATION
INCENTIVE PROGRAM

Draft Resolution accepted TPO
Consumer Protections as proposed in
Joint PA AL, which considered
feedback from Q2 Workshop and SGIP
Working Group

Figure 1. Proposed TPO Consumer Protections for SGIP⁸
(Revisions based on the DAC-SASH TPO Model)

- 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 (includes, but not limited to, system support, problem diagnosis, on-site repair, and preventative 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 (i.e., additional or hidden costs outside of what is agreed upon upfront in the sales contract, such as penalties for non-payment not previously disclosed);
- 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 economics of a power purchase agreement (e.g., the financial impacts of a new successor tariff may have a different economic proposition; or impacts from rate escalators built into PPAs);
- 12) Require that TPO agreement include provisions spell-out what happens in the event that the TPO will notify the Host Customer in the event that the company owning the system defaults; and
- 13) Ensure that the TPO transfer of ownership of the incentivized SGIP system to the Host Customer shall not result in incremental revenue or profit to TPO, or in other words, a TPO should not profit from the transfer of ownership of an SGIP system.



Regulatory Update



SELF-GENERATION
INCENTIVE PROGRAM

Decision (D.) 24-03-071 (“the Decision”) requires that the CPUC maximize the federal cost share of SGIP project costs covered by the federal IRA tax credits with the goal of spreading SGIP funds to more projects. This Resolution determines how to update CPUC policy on how to maximize the federal cost share of SGIP project costs covered by the federal IRA through the following policies:

- Requires all projects that claim less than 30 percent of the total eligible project costs through the federal tax credit to submit supporting documentation to validate both:
 - a. Why the project is ineligible for the tax credit; and
 - b. Why the project could not be third-party owned (TPO)?
- All host customer-owned projects with a permission to operate (PTO) date after December 31, 2025, are no longer eligible for the tax credit (criteria a). The applicants will still need to demonstrate how they meet criteria b to claim less than 30 percent of the total eligible project costs through the federal tax credit.
- Maintains the current SGIP policy of a 30 percent deduction from the total eligible project costs for TPO or non-residential projects that have material assistance from a prohibited foreign entity.
- Removes the assumed tax credit for solar equipment for TPO or non-residential projects with a PTO date after December 31, 2027.
- Requires the SGIP PAs to make the relevant handbook and application changes before January 1, 2026 through a Tier 1 advice letter.
- Maintains the pathway for SGIP PAs to modify the tax credit in SGIP if the availability of the tax credit changes or if in one year from issuance of this Resolution there has been low uptake in the program due to these policies.

Draft Resolution modified elements in Joint PA AL to help gather the appropriate project information and further refine ITC requirements in SGIP



Regulatory Update



Statewide Update: SGIP Close-out

Approved Decision 25-12-003

- Approved in the December 4, 2025 CPUC Voting Meeting
- Provided guidance to PAs on the closeout of ratepayer and taxpayer SGIP budgets from Administrative Law Judge (ALJ) Ruling on SGIP's Close-out issued on April 28, 2025
- CPUC addressed Assigned Commissioner's Ruling on SGIP's DR requirement for RSSE (Low-income) Customers released on July 7, 2025, supporting an exemption to the requirement to participate in a qualifying DR program for all residential low-income customers applying to the RSSE budget
- Allowed extensions for special and unusual circumstances – all Non-residential equity and Non-residential equity resiliency projects would be eligible for this relief, retroactive to March 1, 2025
- Ratepayer-funded portion of SGIP sunsets December 30, 2025



Regulatory Update



SELF-GENERATION
INCENTIVE PROGRAM

| PA Territory | Update |
|---|---|
|  | <ul style="list-style-type: none">• Submitted on October 3, 2025 Advice Letter 5644-E proposing SGIP Ratepayer Funds Between Budget Categories• Submitted a Tier 1 AL that was approved and became effective on October 24, 2025. Advice Letter 5656-E proposing removal of its SGIP Small Residential Budget Soft-Cap |
|  | <ul style="list-style-type: none">• Submitted on November 6, 2025 Advice Letter 5143-G/7751-E requesting a Reallocation of SGIP Funds Between Budget Categories<ul style="list-style-type: none">○ On Nov 26, filed a supplemental updating budget numbers |
|  | <ul style="list-style-type: none">• Submitted on November 13, 2025 Advice Letter 6562-G requesting to Approve SGIP Eligible Residential Time-Varying Rates Within SoCalGas Territory |



Regulatory Updates



SELF-GENERATION
INCENTIVE PROGRAM

Questions?



SELF-GENERATION
INCENTIVE PROGRAM

SGIP Closeout Decision - Ratepayer

Lupe Knox, CSE



SGIP Closeout Decision - Ratepayer



SELF-GENERATION
INCENTIVE PROGRAM

December 30, 2025

- Last Day to Receive Applications
- Close Date for Waitlist
- PBI Period reduced to 2 years (for projects entering PBI after 12/30/25)
 - 2 Year PBI Incentive Calculation:
 - $\$/kWh = \text{remaining } 50\% \text{ of incentive} / (\text{energy capacity (kWh)} * 104 \text{ full discharges} * 2 \text{ years})$

Extensions (effective as of 12/4/25)

- All PBI extensions will be removed
- Non-Residential Equity and Equity Resiliency projects will have access to up to four additional 6-month extensions if the following conditions are met:
 - The Host Customer has passed the Proof of Project Milestone submitted stage
 - The project will be completed before all extensions expire
 - The Host Customer agrees to participate in a SGIP-approved Demand Response program for ten years by Incentive Claim Form submission

Stay on Covid Cancellations will be removed (effective as of 12/4/25)

Demand Response

- Demand Response participation requirement has been removed for RSE and RSSE Residential Low-Income Customers and is retroactive

SGIP Closeout Decision - Ratepayer



SELF-GENERATION
INCENTIVE PROGRAM

Questions?



SELF-GENERATION
INCENTIVE PROGRAM

SGIP Closeout Decision – AB209

Ron Moreno, PG&E



SGIP Closeout Decision - Taxpayer



- Customers in the Residential Storage Equity (RSE) and Residential Solar and Storage (RSSE) budgets are no longer required to participate in Demand Response but are encouraged to do so.
- SGIP PAs are allowed to transfer 10% of the annual interest to their administrative budgets. The remaining interest will go to the RSSE incentive budget(s). Next transfer of interest funding is March 2026.
- RSSE budgets will close to new applications on June 30, 2028.



SGIP Closeout Decision – AB209



SELF-GENERATION
INCENTIVE PROGRAM

Questions?



SELF-GENERATION
INCENTIVE PROGRAM

Total Eligible Project Cost Breakdown Refresher

Ron Moreno, PG&E



Total Eligible Project Cost Breakdown Refresher



Total Eligible Project Costs (TEPC):

No project can receive total incentives (to include any combination of the technology incentive and/or California Manufacturer) that exceed the TEPC. Submittal of project cost details is required to report TEPC and to ensure incentive limits are not exceeded. Equipment and other costs outside of the project envelope are considered ineligible project costs but must also be reported.

Special considerations for TEPC:

- Warranty and/or maintenance contract costs associated with eligible project cost equipment. The cost of this component is capped at 10% of the total claimed project costs.
- Electrical and critical loads panel and wiring upgrades are allowable costs for Equity Resiliency and Equity Budget projects with a maximum reimbursement of \$3,500 per project.
- Interconnection costs: Electric grid interconnection application fees, and Metering costs associated with interconnection.
- For incentivized solar and storage, permit and interconnection fees must be inputted equally.

A more detailed list of eligible costs and their description can be found in the 2025 SGIP Handbook v2, section 4.5.2, pg. 46.



Total Eligible Project Cost Breakdown Refresher



SELF-GENERATION
INCENTIVE PROGRAM

Questions?



SELF-GENERATION
INCENTIVE PROGRAM

LADWP Opening

Stephanie Macoritto, LADWP



Background – Opening Day



SELF-GENERATION
INCENTIVE PROGRAM

**SGIP Residential Solar & Storage Equity Program launch on
September 30, 2025 – Day 1 Lottery**

Applications Received

Value:

\$160,905,661

Number of
Applications

Received:

301

Number of Tribal

Applications:

2

LADWP SGIP Incentive

Amount:

\$32.4M

Lottery Breakdown / Process

Application
submittals exceeded
LADWP total
incentives in Day 1



Triggered lottery:
all eligible applications
from Day 1 included in
the lottery



Lottery is facilitated by
the online
database: randomizing
Day 1 applications
then assigning ranks



Next slide



Lottery Breakdown / Process



SELF-GENERATION
INCENTIVE PROGRAM



LADWP posts lottery results,
and non-selected applications
are waitlisted by submission
time



Applications are evaluated in
lottery order by the PA



**Being selected in the lottery does not guarantee funding,
funding reservation occurs only after passing technical review.**

Current Status



SELF-GENERATION
INCENTIVE PROGRAM

of Lottery
applications



43

of Waitlisted
applications



347

Applications in Lottery-
Single Family



44%

LADWP Opening



SELF-GENERATION
INCENTIVE PROGRAM

Questions?



SELF-GENERATION
INCENTIVE PROGRAM

Verdant M&E Update

Brian McAuley, Verdant



Verdant M&E Update



SELF-GENERATION
INCENTIVE PROGRAM

Questions?



SELF-GENERATION
INCENTIVE PROGRAM

Q & A

(Open now for all topics)





SELF-GENERATION
INCENTIVE PROGRAM

Thank You



SGIP PA Contacts



SELF-GENERATION
INCENTIVE PROGRAM

SoCalGas

selfgeneration@socalgas.com

PG&E

selfgen@pge.com

SCE

SGIPGroup@sce.com

CSE

sgip@energycenter.org

LADWP

sgip@ladwp.com

