



SELF-GENERATION
INCENTIVE PROGRAM

SGIP 2nd Quarterly Workshop of 2026

June 26, 2026





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Welcome and Introductions

Rafeek Yacoub, SCE



Introduction



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PROGRAM ADMINISTRATORS

SCE:

- Rafeek Yacoub
- Timothy Krebs

SoCalGas:

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

PG&E:

- Ron Moreno
- Tiffanie Gulley

CSE:

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

LADWP:

- Narek Abcarian
- Stephanie Macoritto
- Eric Escamilla
- Samer Fakhro

Introduction (continued)



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AESC (Technical)

- Dara Salour
- Stephanie Raya

Energy Division (CPUC)

- Gabriel Petlin
- Valentino Tiangco



Agenda

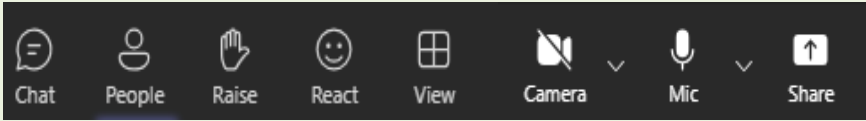
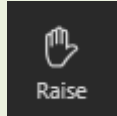
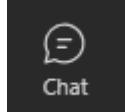


- 9:05** **Welcome, Introductions** (*Rafeek Yacoub, SCE*)
- 9:10** **Teams Meeting Information and Safety Message** (*Rafeek Yacoub, SCE*)
- 9:15** **Program Metrics** (*Ron Moreno, PG&E*)
- 9:25** **Regulatory Update** (*Jan Santos, SoCalGas*)
- 9:40** **TEPC Documentation** (*Stephanie Raya, AESC*)
- 10:10** **2nd Quarter SGIP Workshop Q&A** (*Rafeek Yacoub, SCE*)
- 12:00** **Conclude 2nd Quarter SGIP Workshop**



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



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Firework Safety

⚠ Why It Matters & Common Risks

- Thousands of injuries and fires occur **every year** due to fireworks
- Most common injuries: **burns to hands, face, and eyes**
- Many of these injuries are **preventable**
- Common risks include misuse or malfunction of consumer fireworks

🛡 Key Safety Principles & Prevention Tips

- Leave professional-grade fireworks to **trained professionals**
- Keep a **safe distance** when any fireworks are in use
- Light **one firework at a time**, then immediately move away
- **Never relight a dud** — treat it as a live device
- Keep a **bucket of water or garden hose** nearby at all times
- Always follow **product instructions and local laws**



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Program Metrics

Ron Moreno, PG&E



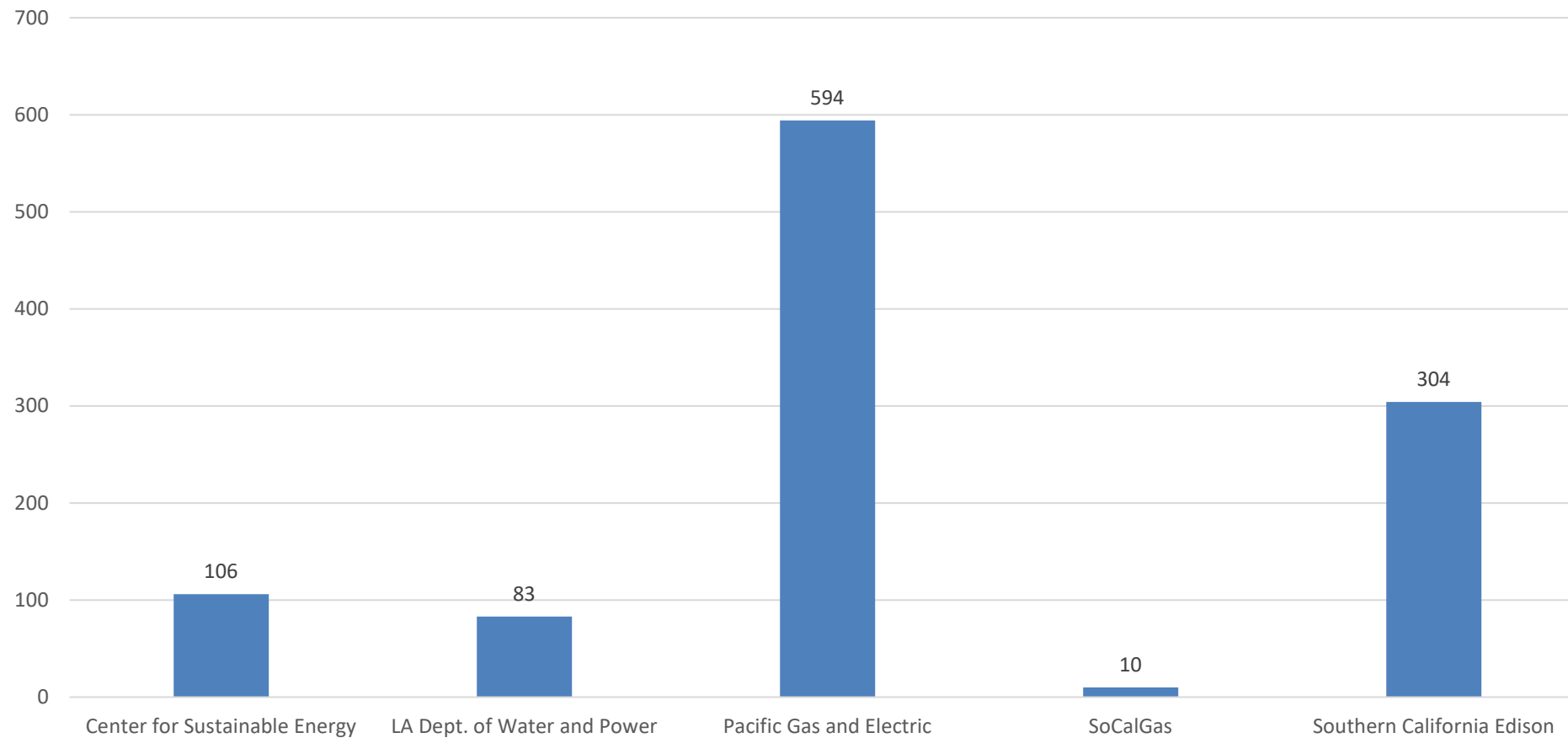
Program Metrics

Data January 2026 – June 22, 2026



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Total Applications Received By Program Administrator



Does not include cancellations and waitlist projects

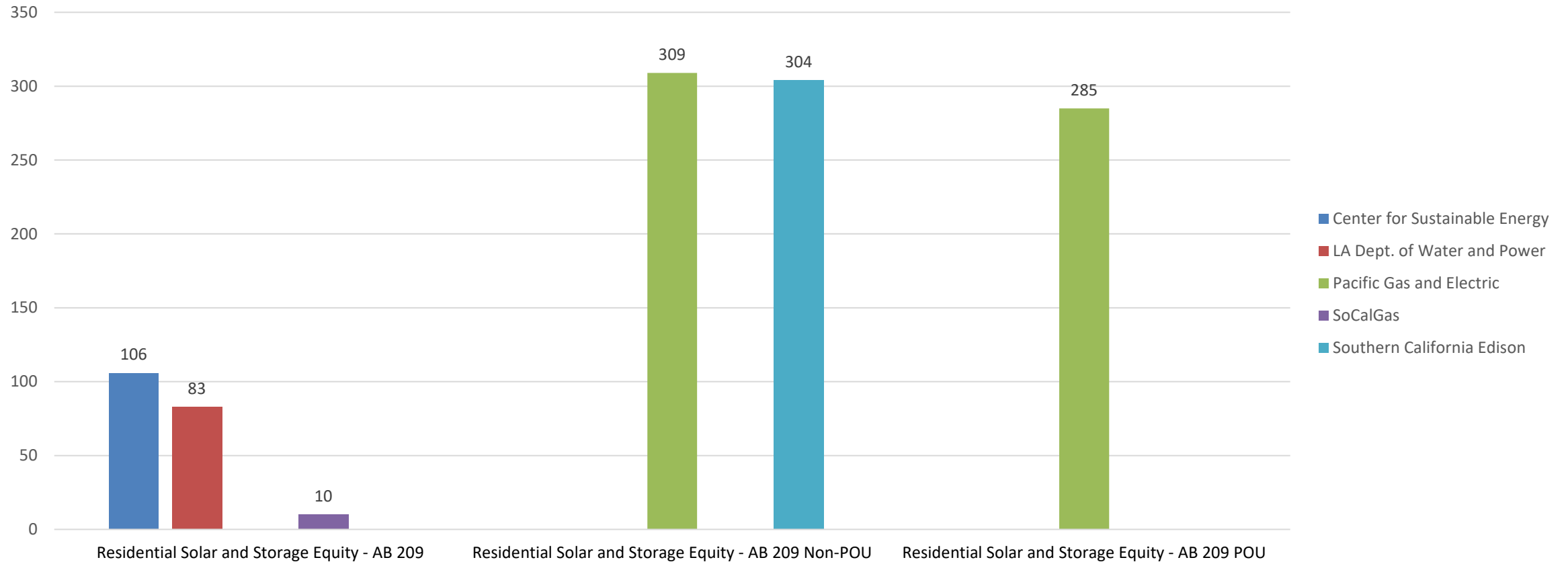
Program Metrics

Data January 2026 – June 22, 2026



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Applications Received By Budget Category

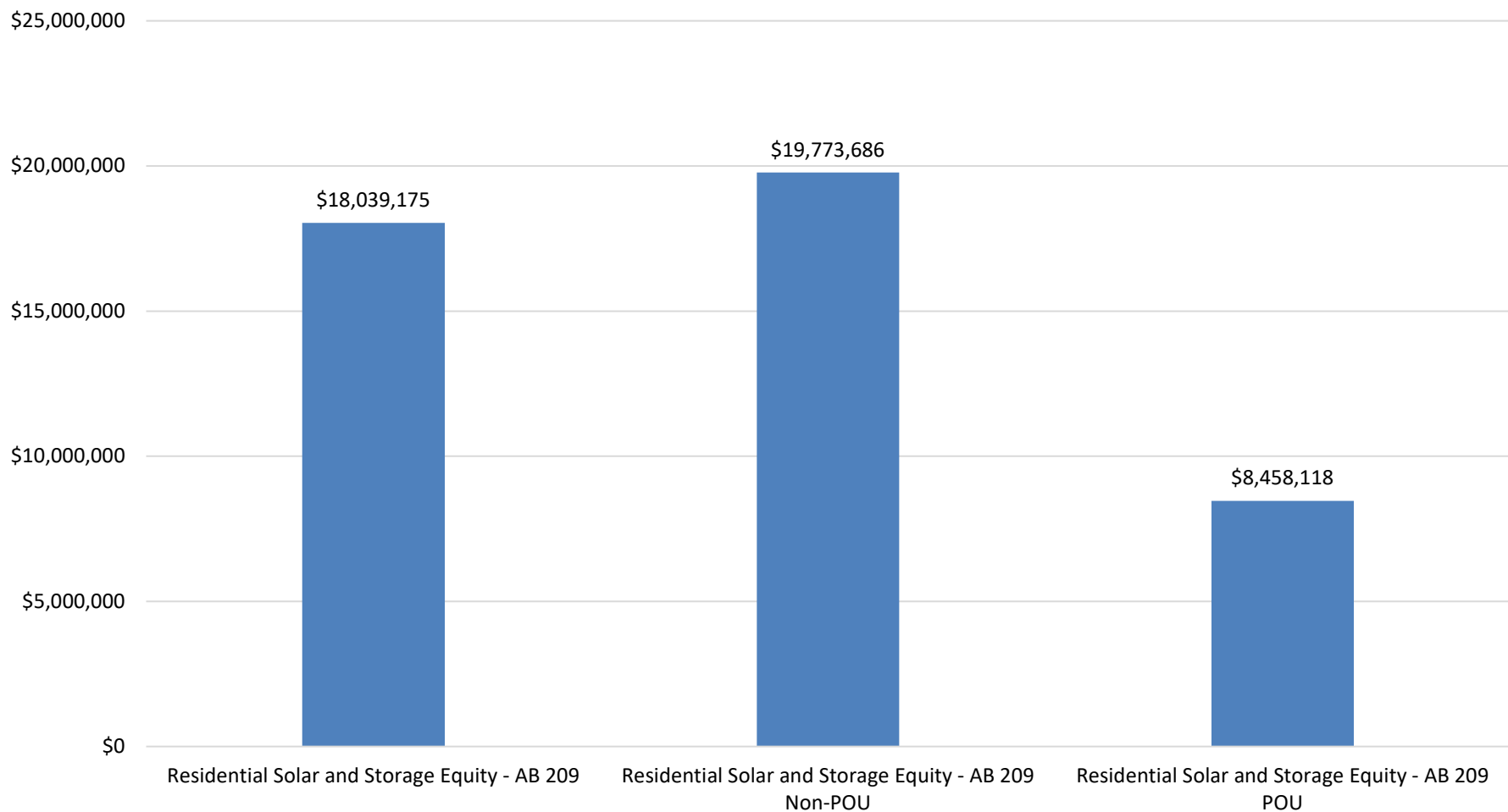


Program Metrics

Data January 2026 – June 22, 2026



Incentives Submitted in 2026

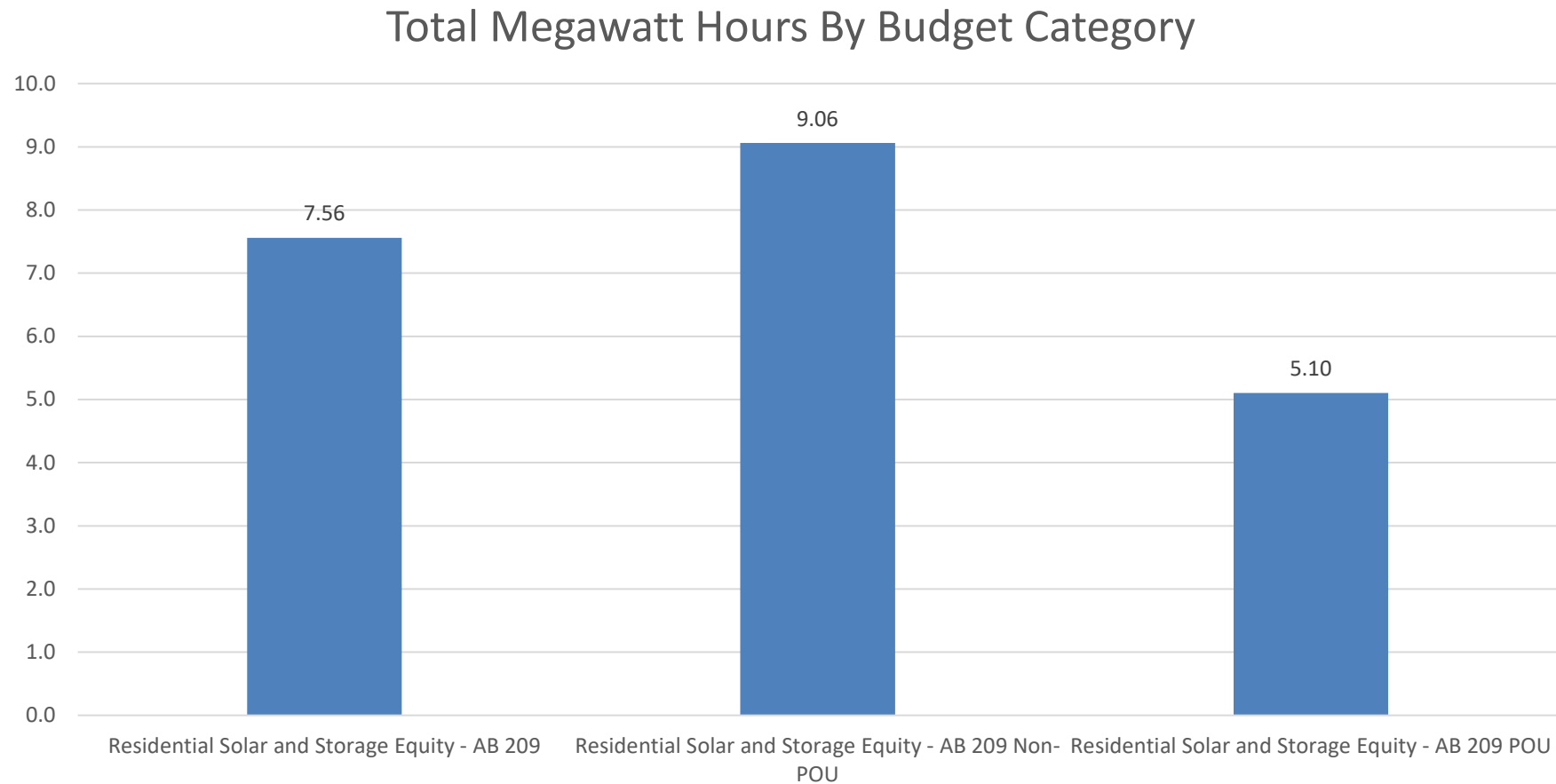


Program Metrics

Data January 2026 – June 22, 2026



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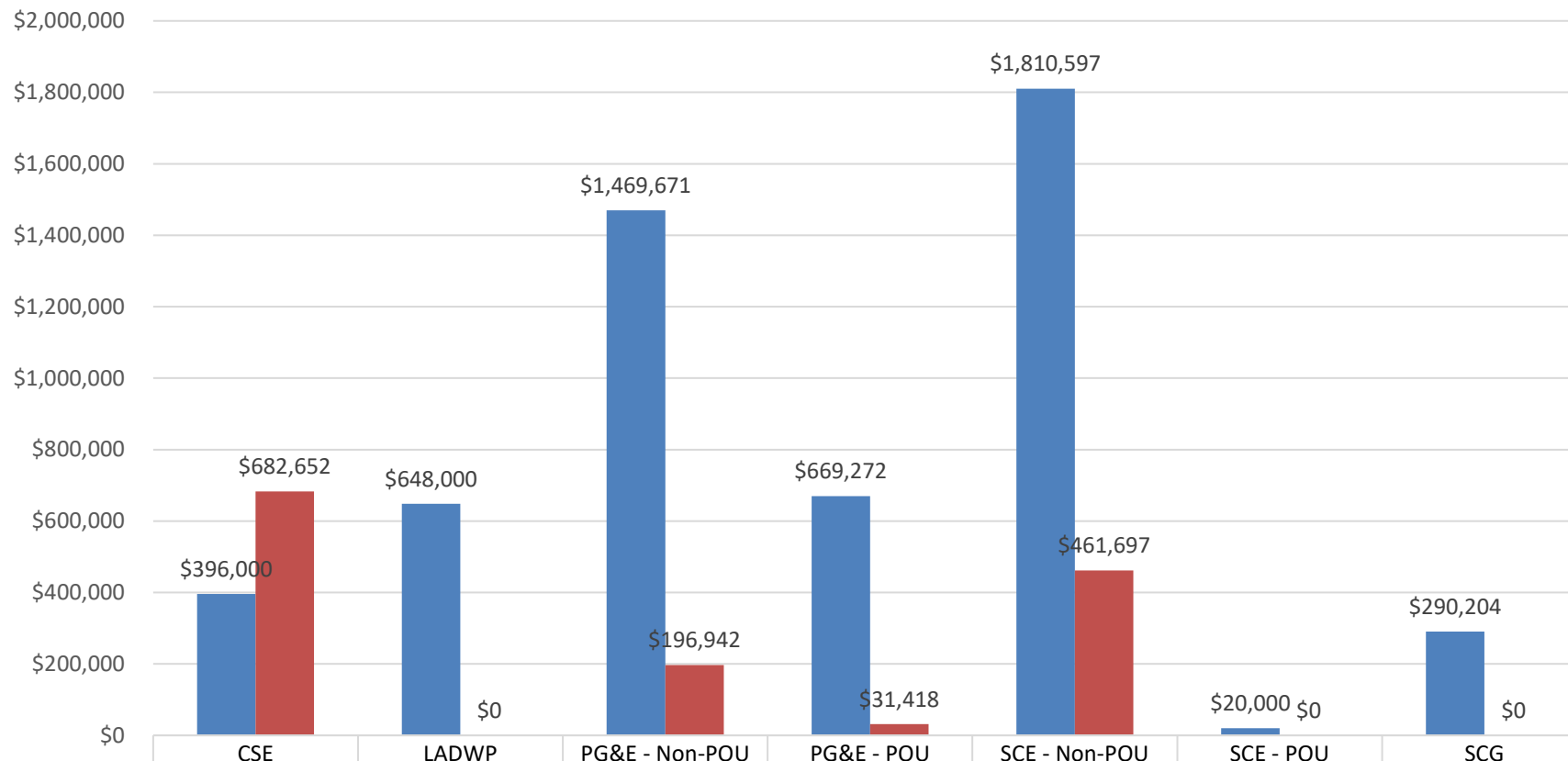
Program Metrics

Data January 2026 – June 22, 2026



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AB209 Tribal Funding Availability



Sum of Tribal Budget	\$396,000	\$648,000	\$1,469,671	\$669,272	\$1,810,597	\$20,000	\$290,204
Sum of Incentives Requested - Tribal	\$682,652	\$0	\$196,942	\$31,418	\$461,697	\$0	\$0

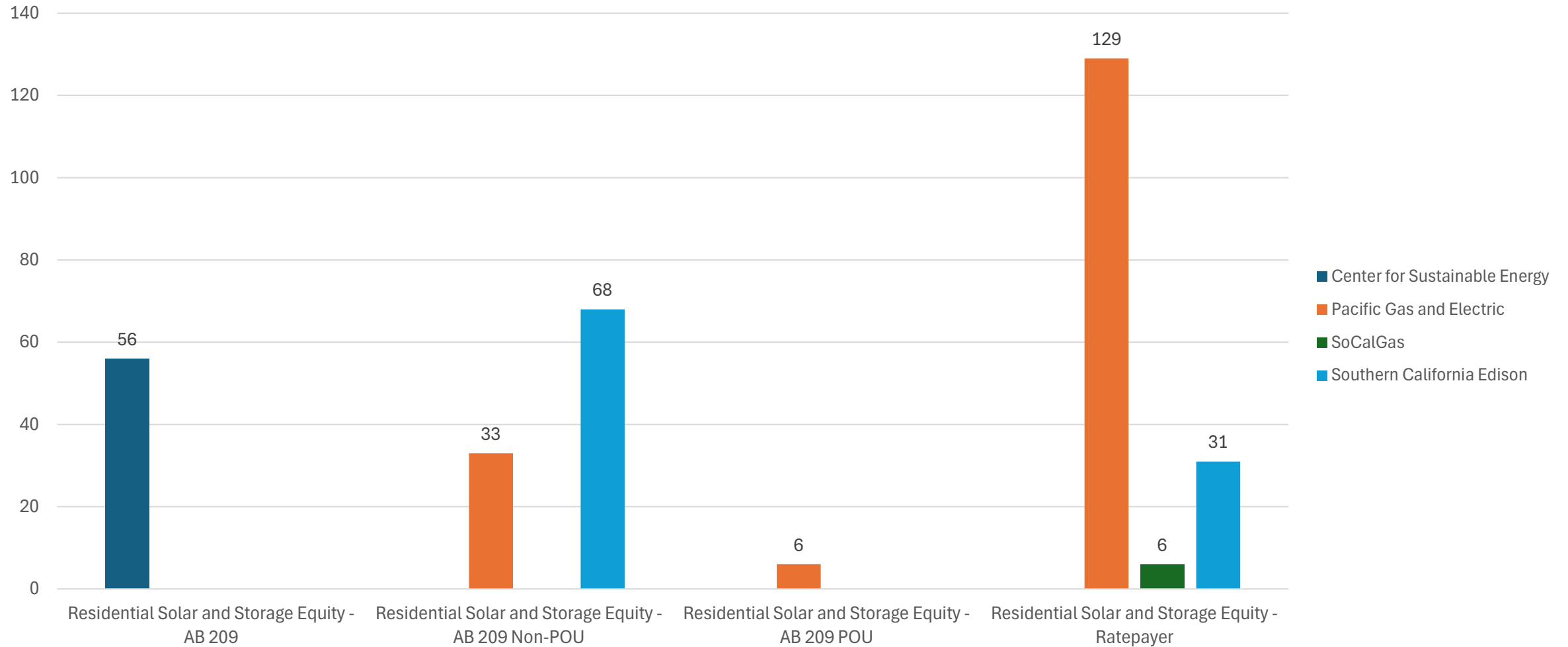
Program Metrics

Data: Inception to July 1, 2026



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Paid RSSE Applications



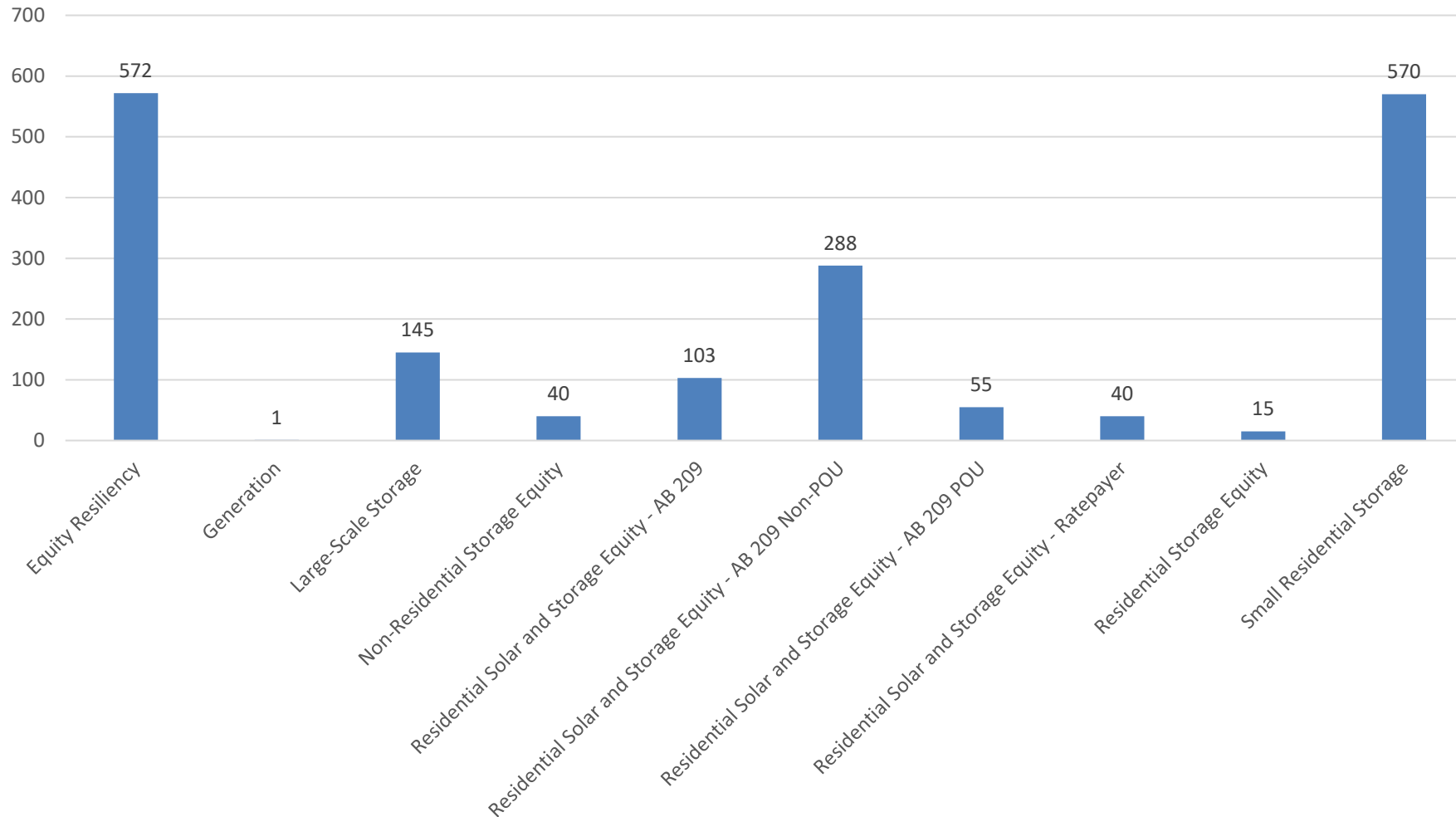
Program Metrics

Data January 2026 – June 22, 2026



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Cancellations By Budget Category



Program Metrics

Data January 2026 – June 22, 2026



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Budget Category	CSE	SCE	SCG	PG&E	LADWP
Residential Solar and Storage Equity - AB 209	Waitlist	NA	Waitlist	NA	Waitlist
Residential Solar and Storage Equity - AB 209 POU	NA	Open	NA	Open	NA
		\$1,000,000		\$5,757,432	
Residential Solar and Storage Equity - AB 209 Non-POU	NA	Waitlist	NA	Waitlist	NA

selfgenca.com/home/program_metrics/

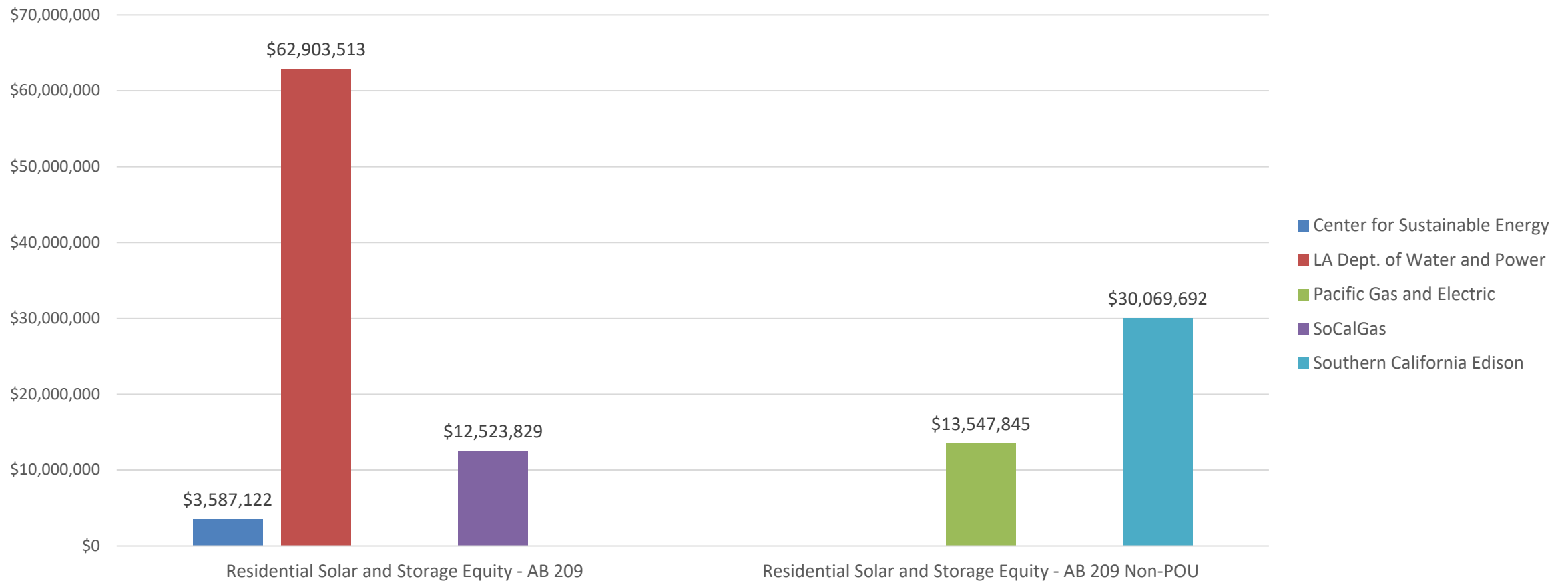
Program Metrics

Data January 2026 – June 22, 2026



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AB 209 Waitlists



Program Metrics



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Questions?



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Regulatory Update

Jan Santos, SoCalGas



Regulatory Update



D.26-04-032 Dismissed Petition For Modification (PFM) for SCTCA and LGSEC

- Effective April 30, 2026:
- PFM filed on April 8, 2025, by **Southern California Tribal Chairmen's Association (SCTCA)** and **Local Government Sustainable Energy Coalition (LGSEC)**, was dismissed because relief was granted in D.25-12-003
- Relief requested in PFM, which has been adopted retroactively:
 - *SGIP Handbook be modified to provide four additional six-month extensions beyond the three presently authorized for non-residential equity projects, after which no further extensions would be permitted*
 - *All non-residential equity projects would be eligible for this relief retroactive to March 1, 2025*

Regulatory Update



Assigned Commissioner's Ruling (ACR) on Resuming Payments & Notifying Developers of Audits

- ACR issued May 8, 2026
- SGIP PAs shall collect cost verification documentation in compliance with previous rulings in this proceeding
- SGIP PAs shall pay developers in the SGIP RSSE program for completed projects with approved and completed ICFs, complete cost documentation, and a Supplemental Cost Verification Form, in compliance with the ACR from March 13, 2026
- The Commission's UAB will perform audits to determine whether TEPC costs are properly substantiated and consistent with SGIP program rules

Regulatory Update



D.26-05-021 - Order Extending Statutory Deadline

- Decision Effective May 14, 2026
- R.20-05-012 (originally initiated May 2020) extended its current statutory deadline from June 1, 2026 to Sept 30, 2026

Regulatory Update



Proposed Decision (PD) Denying Moulton Niguel Water District's PFM

- PD Issued on June 12, 2026
- The PFM asks for the Commission to modify D.11-09-015 and the SGIP Handbook so that Moulton Niguel's SGIP incentive can be based on its portfolio-wide energy demand rather than solely the on-site demand at its Bridlewood Flow Control Facility
- According to Moulton Niguel, this modification would better align the elements of the SGIP with the Renewable Energy Self-Generation Bill Credit Transfer (RES-BCT) program. Moulton Niguel also asserts that the modification would alleviate barriers to entry for emerging clean energy technologies, such as pressure-reducing turbines
- Comments due July 2nd, Reply Comments due July 7
- To be heard, at the earliest, at the July 16 CPUC Business Meeting

Regulatory Update



Advanced Payment Program (APP) – Annual Recertification

- Resolution E-5346 made effective September 26, 2024, for Implementation of SGIP's Upfront Incentive Payments
- CPUC approved:
 - *Be an SGIP approved developer in good standing;*
 - *Provide a Certificate of Insurance for Commercial General Liability;*
 - *Possess a Business Auto Insurance;*
 - *Possess a satisfactory Better Business Bureau rating;*
 - *Provide a signed Upfront Incentive Agreement Form for each project;*
 - *Not be in the process of dissolving or filing for bankruptcy; and*
 - ***Developer must annually recertify the above.***

Regulatory Update



Advanced Payment Program (APP) - Recertification Due by June 30, 2026

Notice Sent on June 15, 2026, to APP approved Developers due for recertification :

APP approved developers must annually furnish the Program Administrator (PA) with Certificate(s) of Commercial General Liability and Business Auto Insurance to continue participating in the APP. To keep your eligibility current, please provide both of the following insurance coverages:

*1) **Certificate of Insurance for Commercial General Liability** which limit shall not be less than \$1,000,000 each occurrence/\$2,000,000 aggregate for bodily injury, property damage and personal injury.*

*2) **Business Auto Insurance** which shall be at least as broad as the Insurance Services Office (ISO) Business Auto Coverage form covering Automobile Liability, and which shall not be less than \$1,000,000 each accident for bodily injury and property damage.*

Reminder to send recertification documents to SelfGeneration@socalgas.com by June 30, 2026

Regulatory Update



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Questions?



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TEPC Documentation Presentation

Stephanie Raya, AESC



Cost Documentation Workbooks



- Developers may choose to submit project-specific cost documentation or develop a baseline TEPC for their RSSE projects.
- Optional Cost Documentation workbooks for both project-specific and baseline submissions are available to download on the Statewide Announcements page on www.selfgenca.com (see the 2026-06-08 post).

Cost Documentation Workbook Links

Baseline Cost Documentation for SGIP RSSE V3

https://www.selfgenca.com/documents/application_forms/cost/baseline_cost_documentation

Project Cost Documentation for SGIP RSSE V3

https://www.selfgenca.com/documents/application_forms/cost/project_cost_documentation

Developer Baseline Methodology



Developer Baseline TEPC Methodology

- Developers have the option to establish a baseline for each PA they work with.
- Baseline uses cost information for a set number of projects depending on the number of active RSSE projects in the PA's territory:
 - < 200 projects = 10 projects
 - ≥ 200 projects = 20 projects
- Baseline created by taking average of the 10 or 20 projects in each cost category per the SGIP Handbook.
- Developer must submit a Total Project Cost Documentation Workbook along with supporting documents/invoices/receipts for each of the cost categories.

See the Statewide Announcement made on 2026-05-29 on www.selfgenca.com for the full methodology.



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Project Cost Documentation Workbook

Breakdown Sheet



- Fill out for individual project submissions and meant to help categorize costs in each of the SGIP cost categories and document the backup invoice/receipt.
- Start in the ‘*Breakdown*’ tab and fill out fields highlighted in yellow.

Cost Documentation For SGIP RSSE Projects	
SGIP Application Number	
Developer Company Name	
Host Customer Name	
Project Site Address	
Instructions:	
1. Fill out cells in this color or leave blank if not applicable.	
2. Notate the filename of the uploaded invoice/receipt for the respective cost category.	

- Section for:
 - Developers to enter the cost in each cost category.
 - PAs to approve cost/documents.
 - Developers to indicate the filename of the backup invoice/receipt.

Interconnection	Cost per Job	PA Approved (Y/N)	Uploaded Document Filename
Electric Utility			

Capital Equipment



- Detail bulk costs for a general list of equipment.
- If costs not purchased in bulk, can put quantity of 1 for *# per Batch* and quantity of 1 for *# per Job*.
- Rows for *Miscellaneous* costs (for costs that are not listed already) and *Sales Tax*.

Capital Equipment	Bulk Cost	# per Batch	Cost per Each Unit	# per Job	Cost per Job
Panels			\$ -		\$ -
Solar Inverters			\$ -		\$ -
Racking			\$ -		\$ -
Batteries			\$ -		\$ -
Battery Inverters			\$ -		\$ -
Distribution Load Panels			\$ -		\$ -
Gateways			\$ -		\$ -
ATs			\$ -		\$ -
Disconnect Switches			\$ -		\$ -
MCIs			\$ -		\$ -
Meter Collars			\$ -		\$ -
Wire			\$ -		\$ -
Conduit			\$ -		\$ -
Miscellaneous					
Sales Tax					
Subtotal					\$ -

Engineering & Design Construction & Installation



- These two categories are formatted the same that allows entry of *Billing Rates*, *# of Employees per Job* and *# of Hours per Employee*.
- Able to add any *Subcontractor* costs as a *Total Cost* with the *# of Jobs* per cost to determine *Cost per Job*.

Engineering & Design	Fully Burdened Billing Rate (\$/hr)	# Employees per Job	# Hours per Employee	Total Hours per Job	Cost per Job
Designer				0	\$ -
	Total Cost		# of Jobs		
Subcontractor					\$ -
Subtotal					\$ -
Construction & Installation	Fully Burdened Billing Rate (\$/hr)	# Employees per Job	# Hours per Employee	Total Hours per Job	Cost per Job
Foreman				0	\$ -
Field Technician				0	\$ -
Project Manager				0	\$ -
Incentive Coordinator				0	\$ -
	Total Cost		# of Jobs		
Subcontractor					\$ -
Subtotal					\$ -

Interconnection | Permitting | Cost of Capital



- *Interconnection* and *Permitting* cost categories are straightforward and include a *Cost per Job*.
- *Cost of Capital* includes *Cost per Year* and the *# of Years* to determine *Cost per Job*.

Interconnection					Cost per Job
Electric Utility					
Permitting					Cost per Job
Jurisdiction					

Cost of Capital	Cost per Year	# of Jobs per Year	Cost per Job
Capital			\$ -

Warranty and/or Maintenance Contract



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- Includes *Cost per Year* and the *# of Years* to determine *Cost per Job*.
- Workbook has a Y/N check if the subtotal of this cost category is capped at 10% of the total claimed project cost. Recommend to fill out entire workbook first and go back to this check to ensure marked as “Yes”.
- If check shows up as “No”, hover over cell to find instructions.

Warranty and/or Maintenance Contract	Cost per Year	# of Years	Cost per Job
Warranty			\$ -
Maintenance Contract			\$ -
Subtotal			\$ -
Is the Warranty and/or Maintenance Contract costs capped at 10% of the total claimed project costs?			N/A

If this cell shows as "No", ensure that all costs are entered into this spreadsheet first. If the cell still shows as "No", then reduce the **Warranty and Maintenance Contract** costs such that the combined costs are less than or equal to 10% of the total claimed project cost and this cell shows as "Yes". Then include the excess cost in the "Ineligible Project Costs" section in the application.

Other Eligible Costs



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- Split between *Project Related* and *Overhead* sections.
- Workbook has a Y/N check if the *electrical and critical loads panel and wiring upgrades* cost is capped at or below the \$3,500 reimbursement limit.
- If check shows up as “No”, hover over cell to find instructions.

Other Eligible Costs (Project Related)				Cost per Job
Transformer upgrades				
Electrical and critical loads panel and wiring upgrades				
Trenching				
Subtotal				\$ -
Is the electrical and critical loads panel and wiring upgrades costs at or below the maximum \$3,500 reimbursement limit?				N/A
Other Eligible Costs (Overhead)				Cost per Job
Insurance				
Office Management (staff) Labor				
Office and Warehouse Rent and Utilities				
Equipment Maintenance				
Transportation to and from Job Site (gasoline)				
Subtotal				\$ -

If this cost **exceeds** the \$3,500 reimbursement limit, **cap** this cost to \$3,500 and include the **excess** cost in the "Ineligible Project Costs" section in the application.

Profit Margin



- Separate section to enter in a percentage markup that is then applied to the respective cost categories:
 - Equipment markup → Capital Equipment
 - Labor markup → Engineering & Design, Construction & Installation
- Markup applied in *Total Cost Per Job* at end of workbook and in the 'Cost Categories' tab.

Profit Margin	Percentage	Markup per Job
Markup on Equipment		\$ -
Markup on Labor		\$ -
Subtotal		\$ -

Total	Total Cost Per Job
Project	\$ -

Cost Categories Sheet



- Summarizes costs in the *'Breakdown'* tab into each of the cost categories per the SGIP Handbook and should match the *Project Cost Breakdown* in the SGIP application.

Cost Category	Cost	PA Approved (Y/N)
Engineering & Design Costs	\$ -	
Capital Equipment Costs	\$ -	
Interconnection Costs – Electric & Gas	\$ -	
Permitting Cost	\$ -	
Construction & Installation Costs	\$ -	
Warranty Cost and/or Maintenance Contract Costs	\$ -	
Metering Monitoring and Data Acquisition System Cost	\$ -	
Sales Tax	\$ -	
Cost of Capital	\$ -	
Other Eligible Costs	\$ -	
Sum of Project Cost Breakdown	\$ -	

Workbook Modifications & Developer Workbooks



Workbook Modifications

- Developers may account for costs differently than how the workbook is formatted.
- AESC can work with Developers (with PA approval) to modify the *Project Cost Documentation* workbook to align with their accounting system.
 - Example: Developers may account for profit margins as a \$ figure rather than a %. The workbook can thus be modified to revise the profit margin to be a \$ value entry and moved to the *Other Eligible Costs* section.

Developer Workbooks

- Developers may already have developed their own workbook to categorize costs which can be used upon PA approval of the workbook format.
- The *Project Cost Documentation* (and *Baseline*) workbook are optional and available to Developers that do not already have their own workbook.



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Baseline Cost Documentation Workbook

Developer Information Sheet



- First tab is the '*Developer Information*' tab where Developer fills out their company information, the PA they wish to establish a baseline for, and selection if they have 200+ projects in that PA's territory.
- **Separate baselines will need to be established for battery-only projects and solar & storage projects.**
 - Meaning 200+ project count selection will need to consider these two subcategories.

Baseline Cost Documentation For SGIP RSSE Projects	
Developer Company Name	
SGIP Program Administrator	
Are there 200+ projects in this PA's territory?	
Instructions:	
Fill out cells in this color or leave blank if not applicable.	
Fill out each sheet from left to right starting with the 'Project Information' sheet.	

Project Selection



- If the Developer has less than 200 projects in the PA's territory, cost information for 10 projects will be required.
- Developers with 200+ projects in the PA's territory will require cost information for 20 projects.
- Cells that are not required will be greyed out depending on this selection.

Developer w/ more than 200 projects

SGIP Application Numbers	
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	
17	
18	
19	
20	

Developer w/ less than 200 projects

SGIP Application Numbers	
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	
17	
18	
19	
20	

Bulk Purchases



- Last question in the '*Developer Information*' tab asks if equipment is purchased in bulk. Depending on selection, one of the two popup notes will appear providing the next set of instructions.

Is equipment purchased in bulk?	Yes
Move on to the 'Equipment Bulk' sheet and skip the 'Equipment' section in the 'Breakdown' sheet.	

Is equipment purchased in bulk?	No
Skip the 'Equipment Bulk' sheet and move on to the 'Breakdown' sheet.	

- Only select “Yes” if all capital equipment is purchased in bulk. Otherwise, select “No” and enter in costs for each equipment piece in the '*Breakdown*' tab.

Equipment Bulk Sheet



- The *'Equipment Bulk'* tab format is the same as the *Project Cost Documentation* workbook.
- The subtotal is then populated for the 10 or 20 projects' *Capital Equipment* cost section in the *'Breakdown'* sheet.

Fill out this sheet and ignore the 'Equipment' section in the 'Breakdown' sheet.					
Capital Equipment	Bulk Cost	# per Batch	Cost per Each Unit	# per Job	Cost per Job
Panels			\$ -		\$ -
Solar Inverters			\$ -		\$ -
Racking			\$ -		\$ -
Batteries			\$ -		\$ -
Battery Inverters			\$ -		\$ -
Distribution Load Panels			\$ -		\$ -
Gateways			\$ -		\$ -
ATSS			\$ -		\$ -
Disconnect Switches			\$ -		\$ -
MCIs			\$ -		\$ -
Meter Collars			\$ -		\$ -
Wire			\$ -		\$ -
Conduit			\$ -		\$ -
Miscellaneous					
Sales Tax					
Subtotal					\$ -

Breakdown Sheet



- The *'Breakdown'* tab follows mostly the same format as the *Project Cost Documentation* workbook but simplified to include total cost for each line item.
- Costs should be entered in for each of the 10 or 20 projects used to establish the baseline.

[illegible]

Cost Categories Sheet



- The 'Cost Categories' tab will take the average between the 10 or 20 projects for each cost category to establish the baseline.
- Projects submitted post-baseline approval will not be required to submit cost documentation for that **cost category** if the cost is equal to or less than the approved baseline for that **cost category**.

Cost Category	Baseline	PA Approved (Y/N)
Engineering & Design Costs	\$ -	
Capital Equipment Costs	\$ -	
Interconnection Costs – Electric & Gas	\$ -	
Permitting Cost	\$ -	
Construction & Installation Costs	\$ -	
Warranty Cost and/or Maintenance Contract Costs	\$ -	
Metering Monitoring and Data Acquisition System Cost	\$ -	
Sales Tax	\$ -	
Cost of Capital	\$ -	
Other Eligible Costs	\$ -	
Sum of Project Cost Breakdown	\$ -	

Conclusions



- Separate baselines should be established for each Developer for their battery-only projects and their solar & storage projects due to large cost differences between these two types of projects.
- Developers should establish separate baselines for each PA due to difference in costs between the territories (e.g. longer driving distances, different jurisdictions, etc).
- Developers with large number of projects are recommended to establish a baseline to reduce need for backup cost documentation and streamline and expedite the review process by the PAs.
- Developers with cost documentation workbooks that already align with the cost categories in the SGIP Handbook should reach out to the respective PAs to get approval for using those workbooks in establishing baselines.

Recommendations



- Developers with a large number of RSSE projects in any PA territory should reach out to that PA to establish a baseline.
- Developers with their own cost documentation workbook for establishing a baseline should contact their PA for approval.
- If a Developer does not have their own workbook, they should work with their respective PAs to modify the workbook available in the SGIP website to match their accounting categories.
- Developers should select a representative sample of their projects to establish the baseline.

TEPC Discussion



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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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