



SELF-GENERATION
INCENTIVE PROGRAM

SGIP 2nd Quarterly Workshop of 2022

Date: June 7, 2022



Introduction



- ***Program Administrators***

- **PG&E**

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

- **Southern California Edison**

- Jim Stevenson, Vicky Velazquez

- **SoCalGas**

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

- **Center for Sustainable Energy**

- Andi Woodall, Melissa Cintron, Shalene Watanabe-O'Toole



Introduction



- **Energy Division**
 - Jonathan Lakey
- **AESC**
 - Dara Salour, Stephanie Raya
- **Energy Solutions**
 - Andrew Chow



Details & Cadence



- Attendees will be muted
- Use raise hand option if you would like to comment
- Type in chat for any questions, comments
- Ideas and Notes will be tracked during the meeting
- This is the 2nd Quarterly Workshop of 2022

Agenda



- Program Metrics
- Metering for Unincentivized Systems
- Inspection Sampling Protocol
- Application Processing Times (RRF, PPM, ICF)
- Regulatory Updates
- Helpful Advice for Applicants / Resources for Applicants



Program Metrics



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Program Metrics

Data 2021 – June 02, 2022

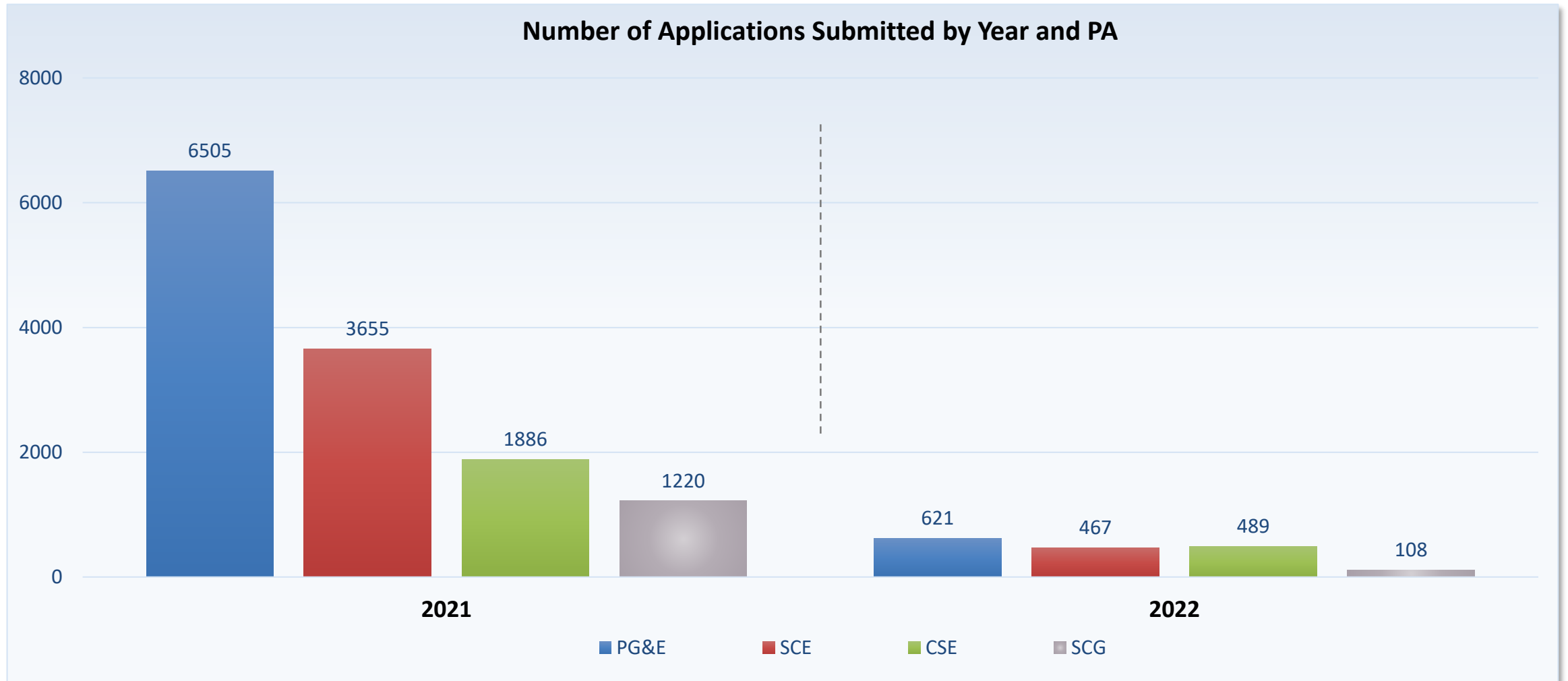


Number of Applications by Year and PA

Data 2021 – June 02, 2022



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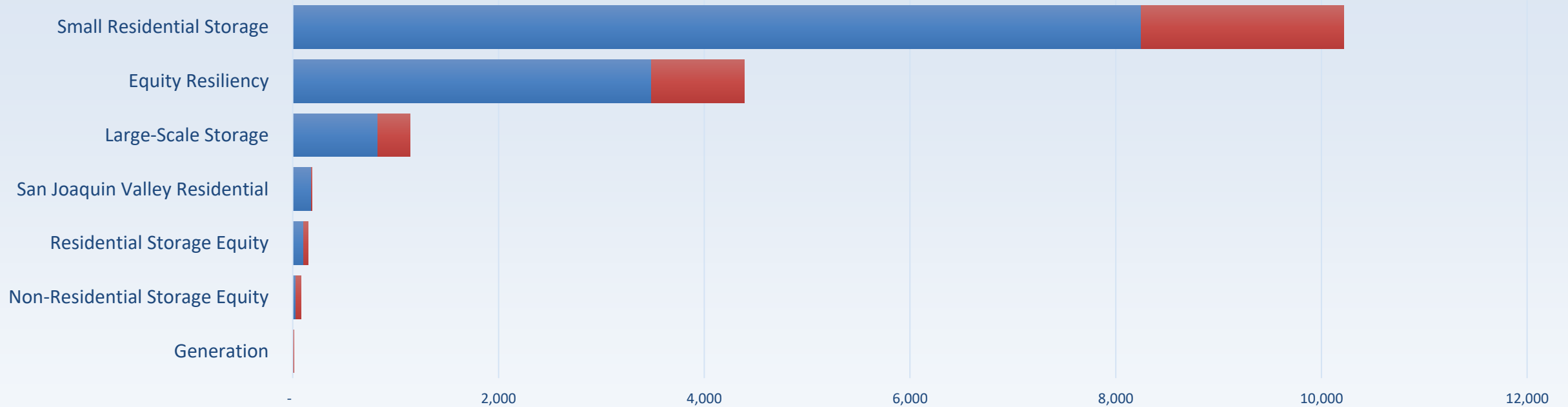
Applications by Year and Budget Category

Data 2021 – June 02, 2022



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Number of Applications by Budget Category



	Generation	Non-Residential Storage Equity	Residential Storage Equity	San Joaquin Valley Residential	Large-Scale Storage	Equity Resiliency	Small Residential Storage
■ 2021	4	27	106	180	824	3,487	8,246
■ 2022	5	51	40	6	315	904	1,970

■ 2021 ■ 2022

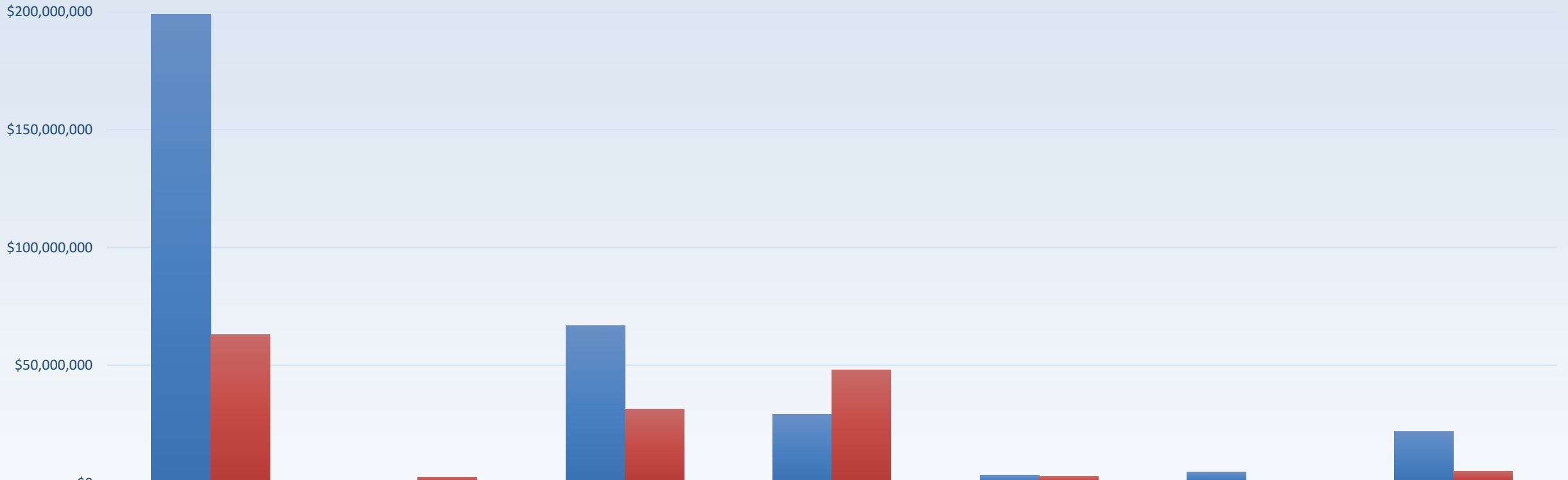
Total Incentives Dollars by Year and Budget Category

Data 2021 – June 02, 2022



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Total Incentive Dollars by Budget Category



■ 2021	199057649.2	176000	66779542.2	29227570.25	3404183.51	4752000	21835133.29
■ 2022	62908875.59	2649221	31385547.99	48196472	2831144.75	158400	4919268.83

■ 2021 ■ 2022

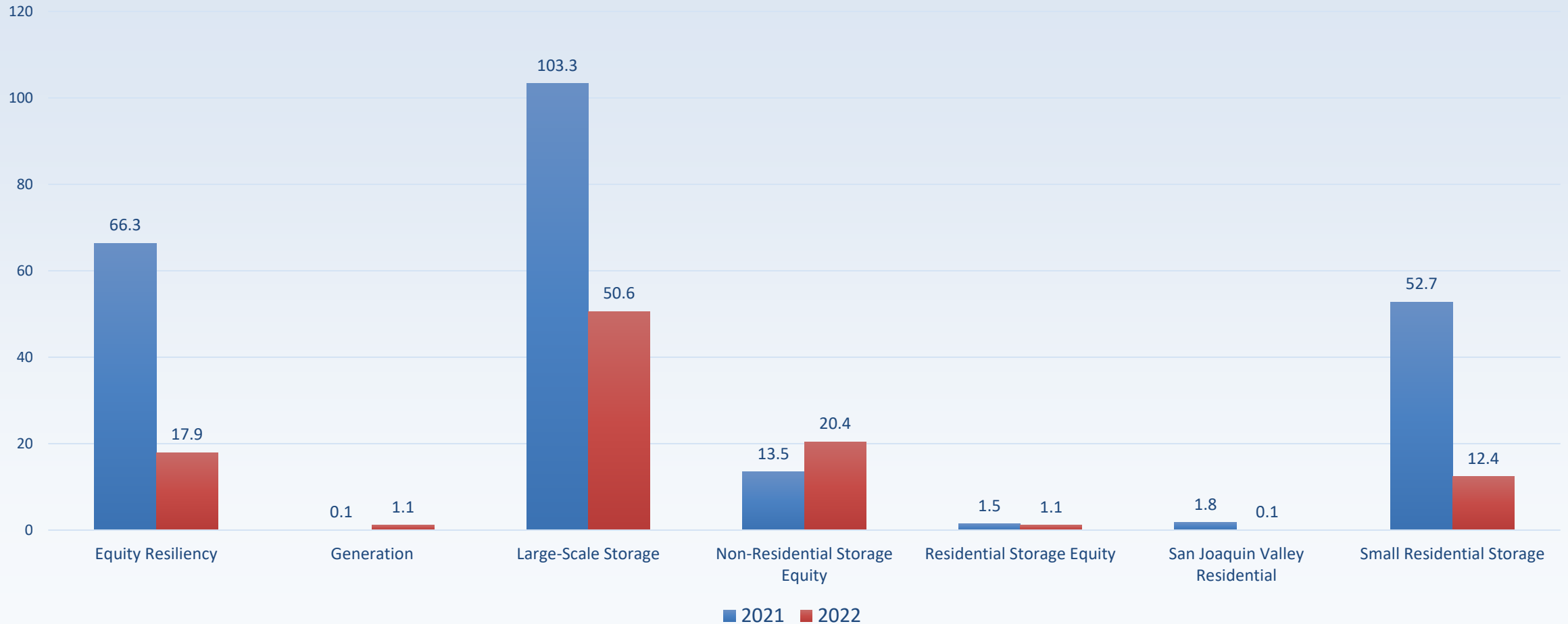
Total Capacity by Year by Budget Category

Data 2021 – June 02, 2022



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Total Capacity (MW) by Budget Category



Current Budget Status

As of 6/06/2022



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Budget Category	CSE	SCE	SCG	PG&E
Large-Scale Storage	Step 4	Waitlist	Step 4	Step 4
	\$11,675,966	Waitlist	\$3,915,334	\$13,948,895
Small Residential Storage	Step 7	Step 6	Step 6	Step 7
	\$996,402	\$1,151,607	\$405,935	\$4,568,825
Residential Storage Equity	Step 5	Step 5	Step 5	Waitlist
	\$2,880,997	\$2,448,676	\$596,403	Waitlist
Non-Residential Storage Equity	Waitlist	Waitlist	Step 5	Waitlist
	Waitlist	Waitlist	\$1,193,813	Waitlist
Equity Resiliency	Waitlist	Step 5	Waitlist	Step 5
	Waitlist	\$3,917,582	Waitlist	\$1,449,543
San Joaquin Valley Residential		Step 5		Waitlist
		\$4,642,400		Waitlist
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	\$37,915,192	\$9,719,514	\$41,780,668

SCE and SCG have 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



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Questions?



Metering for Unincentivized Systems



Metering for Unincentivized Systems

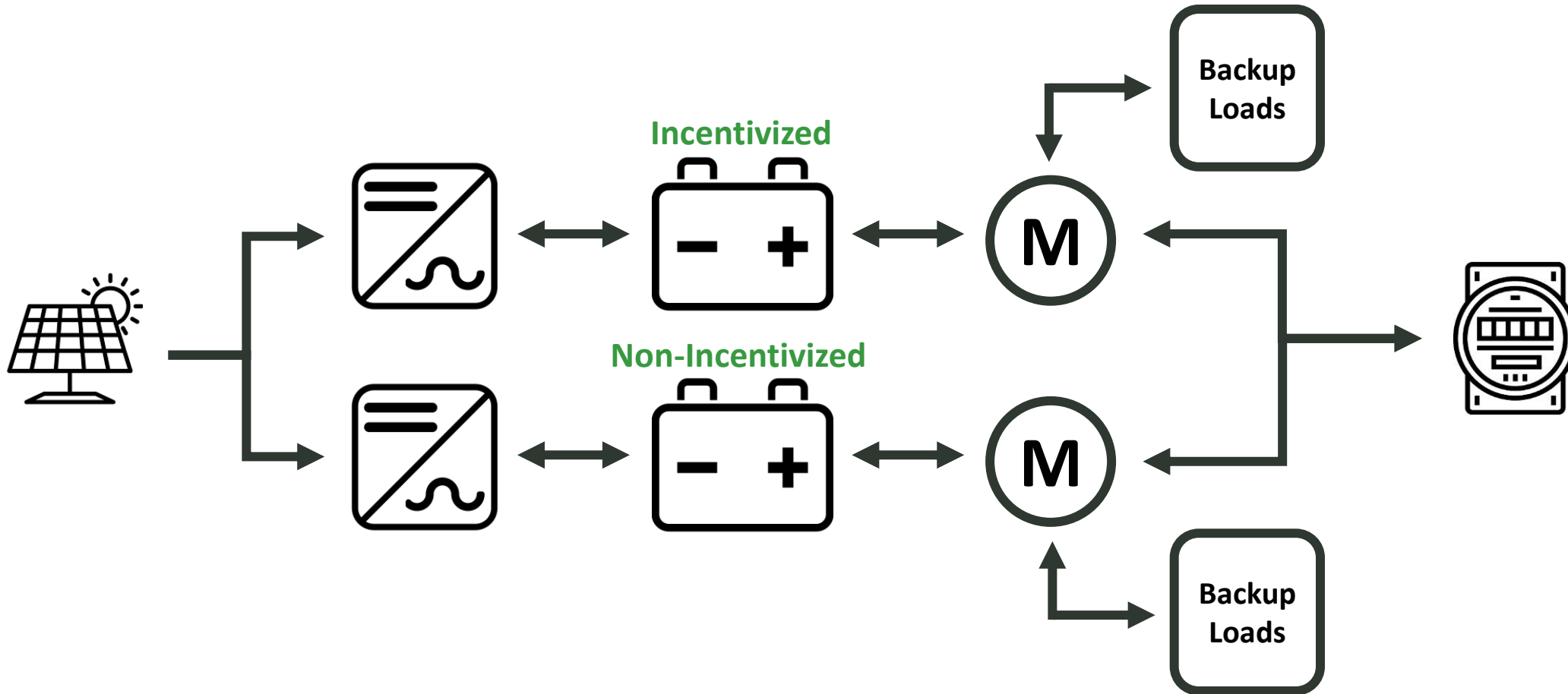


Metering for Unincentivized Systems



- Directed by commission that incentivized systems need to be metered separately from non-incentivized systems.
- Required for PBI data reporting (§5.5 & §6.10) and M&E Activities (§7.4).
- See diagram in following slide for metering points.

Metering for Unincentivized Systems



De-Rating Systems



- Projects that claimed Future Load Growth at RRF but were not able to materialize the loads are subject to de-rating.
- Incentivized total rated capacity (kW) must meet system sizing requirements.
- De-rating options:
 1. (Generation & Commercial) Program system/inverter to limit power output to the customer's annual peak demand; or
 2. Remove ineligible batteries; or
 3. Install separate meter for non-incentivized systems and list the ineligible batteries under the non-incentivized section of application.



Questions?

Inspection Sampling Protocol



Inspection Sampling Protocol



Inspection Sampling Protocol



Changes to the [Inspection Sampling Protocol](#) in an Upcoming Advice Letter

	Before	After
To Get Into Sampling	3 Inspections	2 Inspections
Sampling Rate	1:5 (20%)	No Change
6 Passed Inspections	1:10 (10%)	1:15 (7.5%)
New Equipment Models	3 Inspections	1 Inspection

The databases works by applying a % chance of inspection, as described above.

The language in the revised Inspection Sampling Protocol will be changed to reflect this.



Inspection Sampling Protocol



Questions?



Application Processing Times



Application Processing Times (RRF, PPM, & ICF)



Application Processing Times



- Decision 20-01-021 directed the SGIP PAs “to advance an incentive from submittal to review in 10 days [RRF Review] and to fully process incentive applications, excluding the time the application is in a ‘suspended’ status, within approximately 45 – 60 days [RRF Process] on average.”
- SGIP PAs were also directed to report average, fastest, and slowest processing times against these standards.
- The PAs established the Application Review Time Reports, and the 2020 and 2021 reports are available on the Forms and Documents page of the SGIP website <https://www.selfgenca.com/home/resources/>.

Reports

Statewide Project Report

- Weekly Statewide Report
- Real-Time Public Report
- Monthly PBI Performance Report
- Field Descriptions for Monthly PBI Performance Report
- SGIP Application Review Time Report
- Non-Residential Equity Lottery Waitlist Report



Application Processing Times



Quick Refresher

- RRF Review is the time from the RRF submittal date to the first RRF review date.
- RRF Process is the time from the RRF first review date to the confirmed or conditional reservation date* excluding suspended time.
 - *Note: There is a new 'Equipment Review' status that does not count against the Process time*

* Confirmed Reservation for 2-step projects and Conditional Reservation for 3-step projects



Application Processing Times



- Decision 20-01-021 also directed the SGIP PAs to develop similar expectations with stakeholders for the Proof of Project Milestone (PPM) and Incentive Claim Form (ICF) stages of the SGIP Incentive Application Process.
- Using the timelines established by the CPUC for the RRF Review and Process times as benchmarks, the SGIP Working Group evaluated the 2021 to-date processing times for the RRF, PPM, and ICF steps of the applications processed in all PA territories. This allowed the PAs to identify similar thresholds for the PPM and ICF stages as those established by the CPUC for the RRF stage.
- As part of this evaluation, the PAs have identified the following PPM and ICF timelines:
 - PPM Review
 - Time from the submission date to first PPM review date.
 - PPM Process
 - Time from the first PPM review date to Confirmed Reservation date (excluding time spent in a 'suspended' status)
 - ICF Review
 - Time from the submission date to first ICF review date.
 - ICF Process
 - Time from the first ICF review date to ICF Pending Payment date (excluding time spent in a 'suspended' or 'inspection' status)
 - ICF Inspection
 - Time spent in the ICF Inspection status

Application Processing Times



- As a result of this analysis, the PAs have established the following timeline expectations:
 - PPM Review within 10 days.
 - PPM Process approximately 30 -45 days on average.
 - ICF Review within 10 days.
 - ICF Process approximately 45 -60 days on average.
 - ICF Inspection approximately 45 – 60 days on average.



Application Processing Times



- Yearly SGIP Application Review Time Reports (starting with the 2022 report released in January 2023) will include the average, fast, and slowest times for PPM and ICF Review, PPM and ICF Process, and ICF Inspection Time.
- Due to varying internal payment processing protocols statewide, the SGIP PAs are continuing to evaluate similar processing time standards from ICF Pending Payment to the Initial Payment Issuance and expect to provide an update at a future Workshop.



Application Processing Times



Questions?



Regulatory Updates



Regulatory Updates



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.

- On June 11, 2020, Petersen Dean filed for Bankruptcy.
- Seeks Modification to Decisions (D.) 11-09-015, D.15-06-002, and D.19-08-001.
- Approximately 270 PD projects left with no applicant to help move applications forward to completion.
- Petition for Modification seeks to relieve PD 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



Heat Pump Water Heater

On April 11th, 2022, The California Public Utilities Commission (CPUC) released a decision on the for the SGIP Heat Pump Water Heater Program.

- Allocates \$4.7 million towards administration of the program and \$40 million towards HPWH incentives.
- Allocates an additional \$40 million in 2023 gas Cap-and-Trade allowance proceeds to SGIP HPHW program for a total SGIP HPWH program budget of \$84.7 million.
- Currently a Request for Proposal to decide over an Administrator to oversee Program Implementation.
- Possible timeline Q2 2023.



Regulatory Updates



Advice Letter's Suspended and Awaiting Decision

- Proposal for SGIP Residential Price Cap in Accordance with D.19-09-027, OPs 7(g) and 8(a)
- 2021-2025 Measurement and Evaluation Plan
- California Manufacturer Adder per Resolution E-5182



Regulatory Updates



Questions?



Helpful Advice for Applicants



Helpful Advice for Applicant / Resources for Applicants



Helpful Advice for Applicants



Tips & Reminders

Performance Data Provider (PDP) Applications

- PDP applications are on Selfgenca under “Forms & Documents”
- Send completed PDP applications to your Program Administrator (PA) or Southern California Edison (SCE)
- PAs will send applications to SCE who will work with AESC to process these applications
- Any PA can answer PDP questions, but SCE is the primary point of contact for PDP application submittals.

Payee Address Changes

- Ensure payee addresses are entered correctly on applications
- Update your PA on any address changes to ensure checks are received
- Be generally aware of surrounding neighborhoods that may not accept mail (ex: rural communities)

PTO, TOU Rates, and ICFs

- Reminder that PTO and TOU rates are required as part of the ICF package at ICF submittal
- If additional time is needed, you can submit an extension request to be reviewed by your PA



Helpful Advice for Applicants



Existing Resources

SGIP Application Training Document

SGIP FAQs for Equity Resiliency

References & Tools

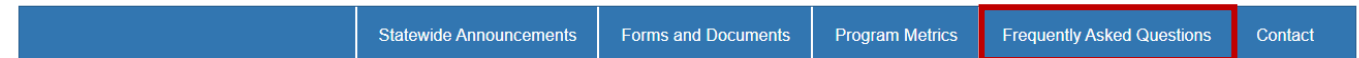
- Approved TOU Rates
- Field Inspection Protocols
- PA PSPS & Wildfire Search Tools
- PGE and SCE Office Hours

Energy Solutions

- Database Log-in Questions
- Password Resets
- Database Bugs & Errors
 - Ex: Inability to submit application

Self-Generation Incentive Program

Login

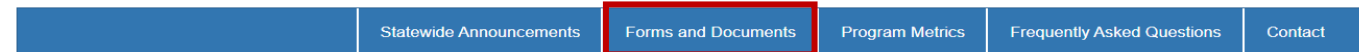


Frequently Asked Support Questions

Most of the questions we receive at SGIP Support are answered in the following videos. The Interface Tutorial is an 8-minute overview of how to submit a new application, while the Database Walkthrough is a one-hour video walking through the full feature set, common mistakes, and frequently asked questions.

Don't have time to watch? Download our [Training Documentation](#). ←

Additional SGIP FAQ questions and answers can be found here: [SGIP FAQ](#). ←



Resources

- [Handbook](#)
- [Program Provided Application Documents and Forms](#)
- [SGIP approved Rates](#)
- [SGIP Developer Eligibility Application](#)



Helpful Advice for Applicants



Industry Feedback

PAs interested in soliciting feedback on resources industry would like to have for the SGIP

Goal - Gather information to inform future resource development

Question Overview

1. Where are the places you have questions or need support?
 - At **Reservation Request Form (RRF)**
 - At **Proof of Project Milestone (PPM)**
 - At **Incentive Claim Form (ICF)**
2. What type of information would be helpful during these individual stages?
3. Of the resources the SGIP currently has, which ones have been helpful? Which ones have **NOT** been helpful?
4. What else could the PAs do to provide helpful SGIP resources?
5. How can the PAs help clarify roles and responsibilities between Host Customers and Developers/Contractors?





Q & A





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Thank You

