



SELF-GENERATION
INCENTIVE PROGRAM

SGIP 2nd Quarterly Workshop of 2024

Date: May 17, 2024



Introduction



- ***Program Administrators***

- **PG&E**

- 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, Ashley Pezikian

- **Center for Sustainable Energy**

- Shalene Watanabe-O'Toole



Introduction



- **Energy Division**
 - Justin Galle, Gabriel Petlin
- **AESC**
 - Dara Salour, Stephanie Raya
- **Energy Solutions**
 - Kelsey Albers, Alejandro Prieto, Katie Freitag



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 2024

Agenda



- Program Metrics
- Regulatory Updates
- Workshop
 - PAs proposal to provide 50 percent of incentive payments upfront to SGIP projects in the Residential Solar and Storage Equity budget, pursuant to D.24-03-071

Program Metrics



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Program Metrics

PGE



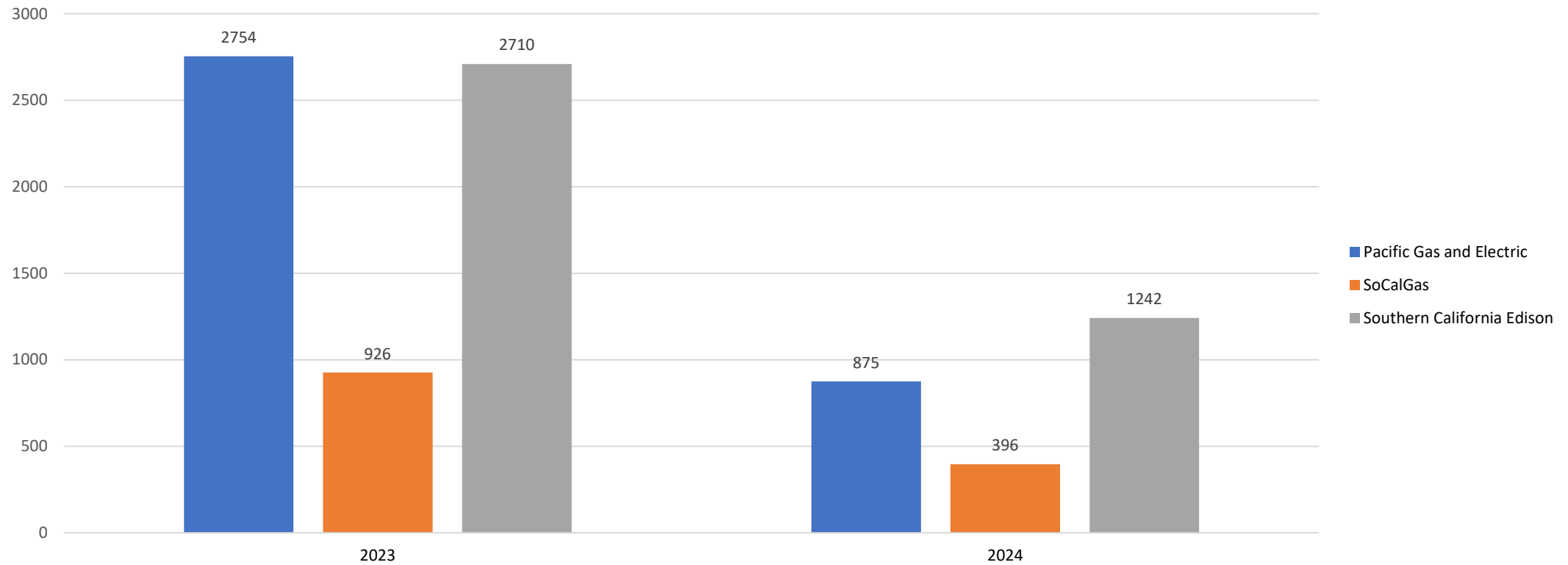
Program Metrics

Data: 2023 – May 14, 2024



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Number of Applications Submitted by PA and Year



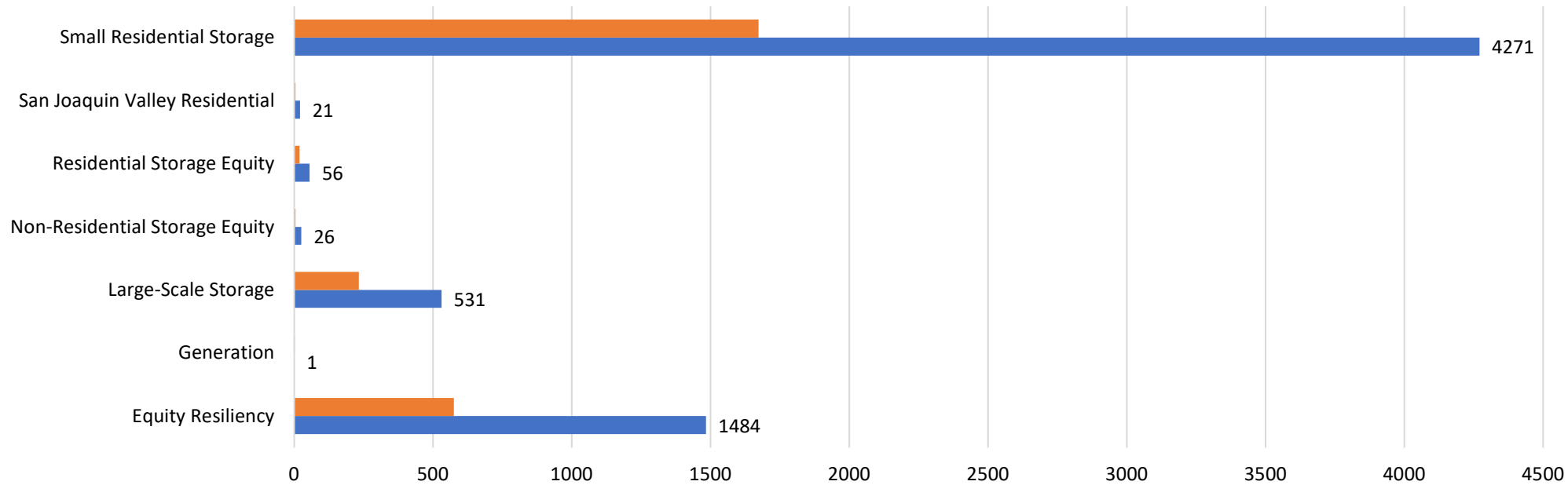
Program Metrics

Data: 2023 – May 14, 2024



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Number of Applications by Budget Category and Year



	Equity Resiliency	Generation	Large-Scale Storage	Non-Residential Storage Equity	Residential Storage Equity	San Joaquin Valley Residential	Small Residential Storage
2024	576	2	233	5	19	5	1673
2023	1484	1	531	26	56	21	4271



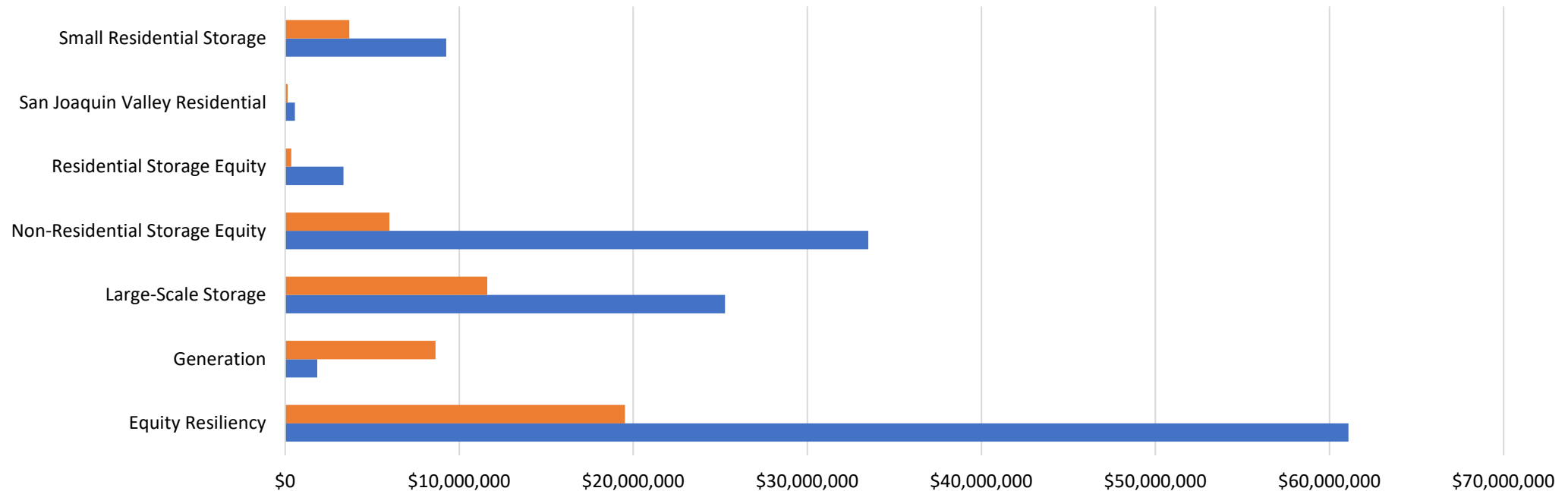
Program Metrics

Data: 2023 – May 14, 2024



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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
2024	\$19,521,720	\$8,640,000	\$11,600,663	\$5,978,756	\$346,101	\$132,000	\$3,677,814
2023	\$61,088,959	\$1,840,000	\$25,270,708	\$33,505,915	\$3,344,934	\$554,400	\$9,255,705

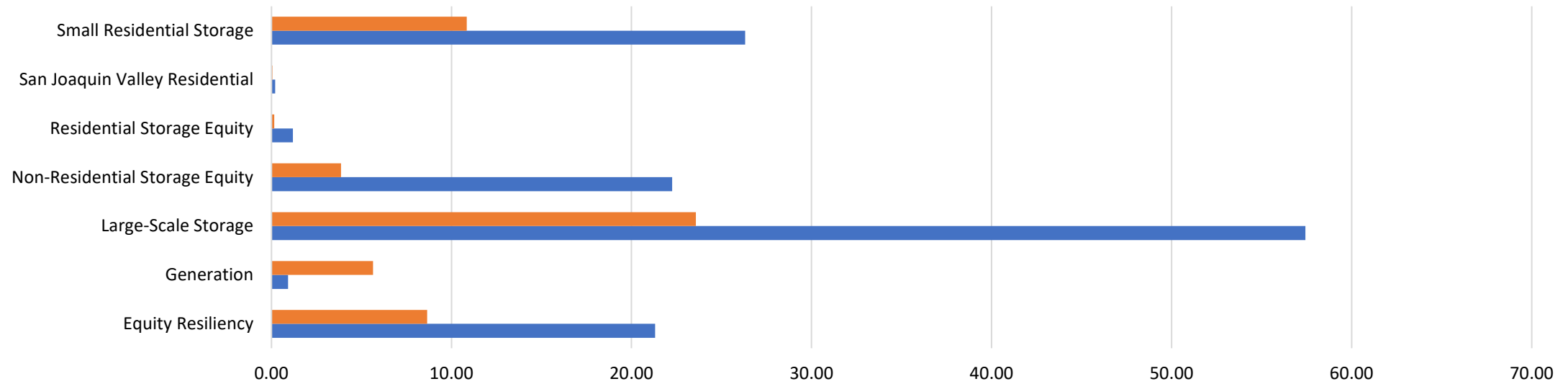
Program Metrics

Data: 2023 – May 14, 2024



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Total Rated Capacity (MW) by Budget Category



	Equity Resiliency	Generation	Large-Scale Storage	Non-Residential Storage Equity	Residential Storage Equity	San Joaquin Valley Residential	Small Residential Storage
2024	8.64	5.64	23.57	3.86	0.16	0.05	10.85
2023	21.32	0.92	57.43	22.26	1.20	0.21	26.31

Axis Title

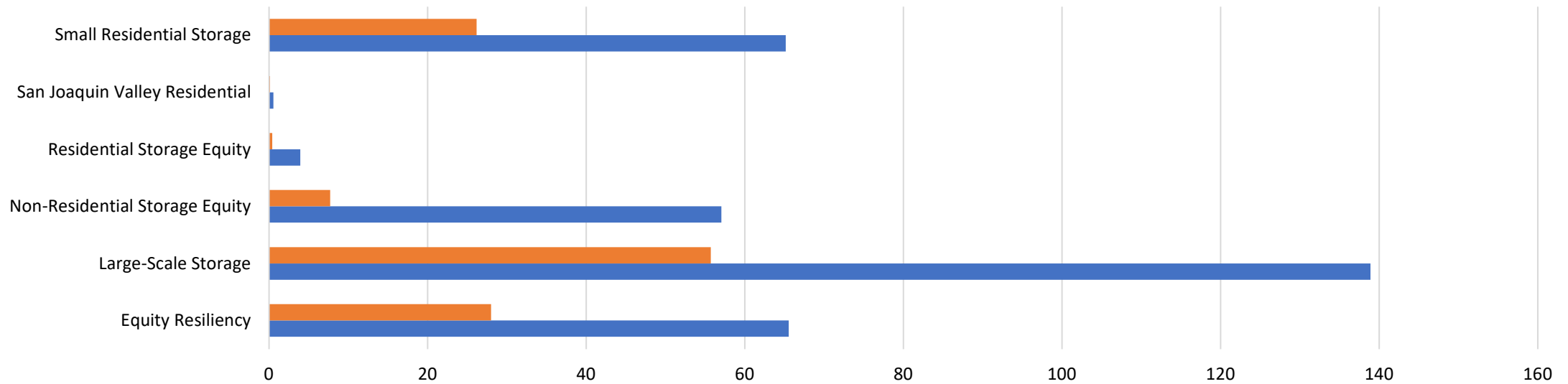
Program Metrics

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Total Energy Capacity (MWh) by Budget Category



	Equity Resiliency	Large-Scale Storage	Non-Residential Storage Equity	Residential Storage Equity	San Joaquin Valley Residential	Small Residential Storage
2024	28.020692	55.71258	7.72013	0.416165	0.132	26.195249
2023	65.545135	138.907369	57.056855	3.942759	0.5544	65.157035

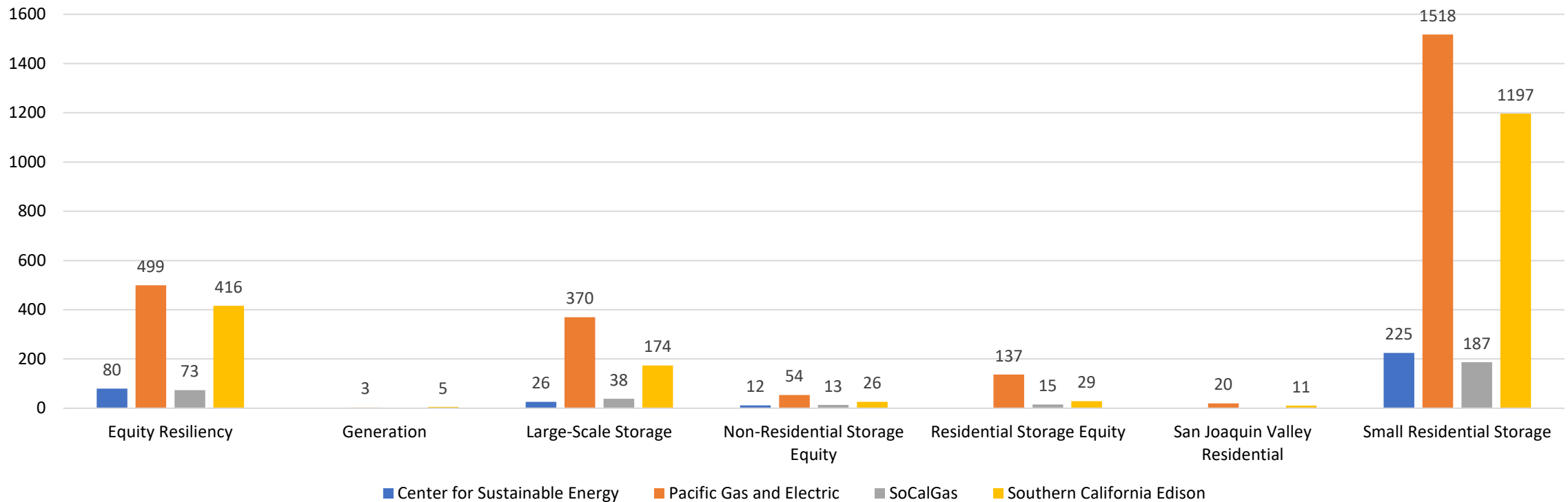
Program Metrics

Data: 2023 – May 14, 2024



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Cancellations by Year



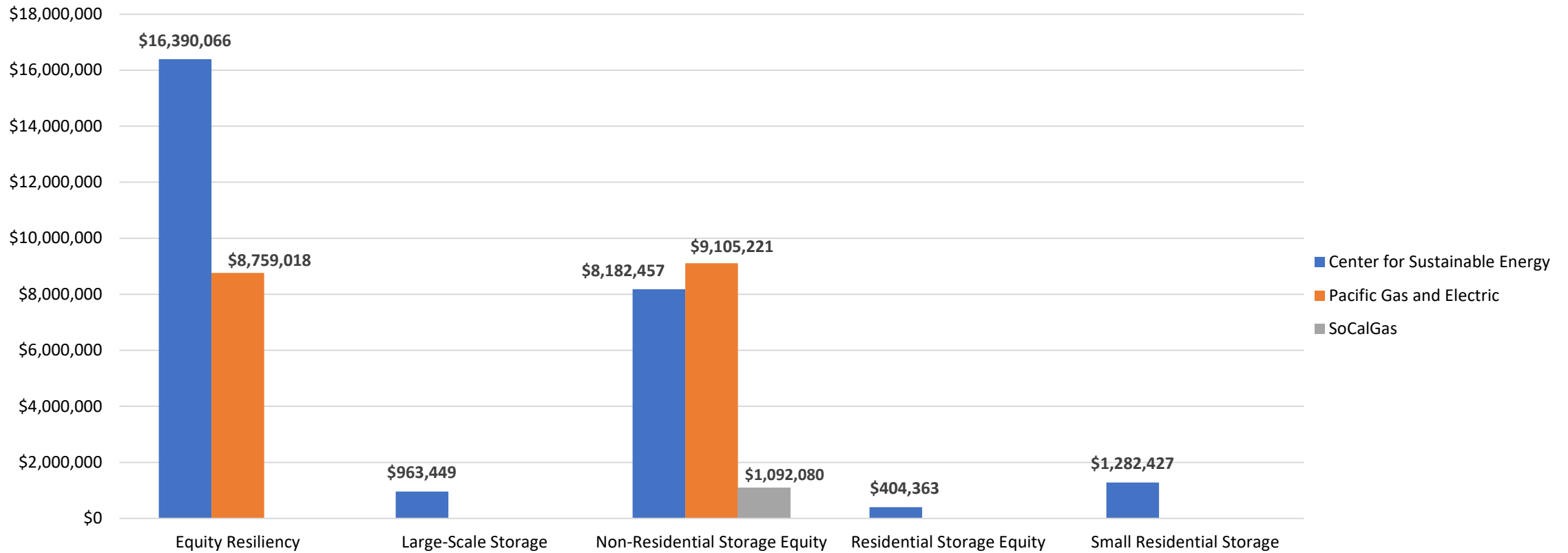
Program Metrics

Data: 2023 – May 14, 2024



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Waitlist



Program Metrics

Data: May 14, 2024



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Budget Category	CSE	SCE	SCG	PG&E
Large-Scale Storage	Waitlist	Step 5	Step 5	Step 5
		\$346,775	\$576,131	\$3,723,317
Small Residential Storage	Waitlist	Step 7	Step 7	Step 7
		\$2,245,137	\$1,092,432	\$1,081,945
Residential Storage Equity	Waitlist	Open	Open	Open
		\$2,524,818	\$884,323	\$17,297,216
Non-Residential Storage Equity	Waitlist	Open	Waitlist	Waitlist
		\$5,424,706		
Equity Resiliency	Waitlist	Open	Open	Waitlist
		\$4,883,655	\$276,484	
San Joaquin Valley Residential		Open		Open
		\$4,378,400		\$154,400
San Joaquin Valley Non-Residential		Open		Closed
		\$120,000		\$0
Generation	Waitlist	Open	Open	Open
		\$35,898,874	\$11,688,395	\$27,494,039

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

All of CSE's budgets are in waitlist status until the CPUC approves CSE's Motion to fully fund SGIP

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/

[SGIP | Waitlists \(selfgenca.com\)](#)



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Questions?



Regulatory Updates

SoCalGas

Regulatory Items



- **Updates**

- CPUC issued Decision D.24-03-071 implementing AB 209
 - Programmatic changes to improve SGIP
- Developer Out of Business
 - Joint Program Administrator Advice Letter



Assembly Bill 209



On March 22, 2024, the Commission issued **D.24-03-071** which allocated \$280 million from the Greenhouse Gas Reduction Fund to the SGIP Residential Solar and Storage Equity (RSSE) budget. This decision provided the framework for the RSSE budget (i.e., eligibility requirements and administration) and made other programmatic changes to improve SGIP.

SGIP Program Administrator	Fund Allocation	% (rounded)
Pacific Gas & Electric	\$110 mil	39%
Southern California Edison	\$97 mil	35%
Los Angeles Department of Water & Power (New PA)	\$36 mil	13%
Center for Sustainable Energy (SDG&E consultant)	\$22 mil	8%
Southern California Gas	\$15 mil	5%
TOTAL	\$280 mil	100%



Assembly Bill 209



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Decision Overview

Administration &
Funding Allocation

Residential Solar
and Storage Equity
Budget

Incentive levels

Upfront Incentive
Payment

Improving Access
for Tribal

Updating eligibility
across budget
categories

Program Structure: IRA
Tax Credit, Demand
Response, Net Billing
Tariff, TOU Rates, Funds
Shifting

Other
Programmatic
Improvements



Assembly Bill 209



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D.24-03-071 Directives	Timeline
Upfront Payment Workshop	June 20, 2024
Proposal for Upfront Payment Tier 2 Advice Letter	
Program Modifications Tier 1 Advice Letter	July 20, 2024
IRA Tax Credit Workshop	August 17, 2024
Implementing AB 209 Tier 2 Advice Letter	August 19, 2024
Proposal for IRA Tax Credit Advice Letter	September 17, 2024



Developer Out of Business



- **Developer Out of Business Advice Letter**
 - Filed 4/19/24
 - Request for relief pursuant to D.23-04-045 for customers impacted by closure of businesses of Kuubix Energy, Silver Fox Renewables LLC, Clean Storage Inc., and Sunworks, Inc.
 - Status: Requested effective date May 19, 2024 – *Pending disposition*





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Questions?



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SGIP Upfront Incentive Proposal Workshop

Date: May 17, 2024



Self-Generation Incentive Program Upfront Proposal



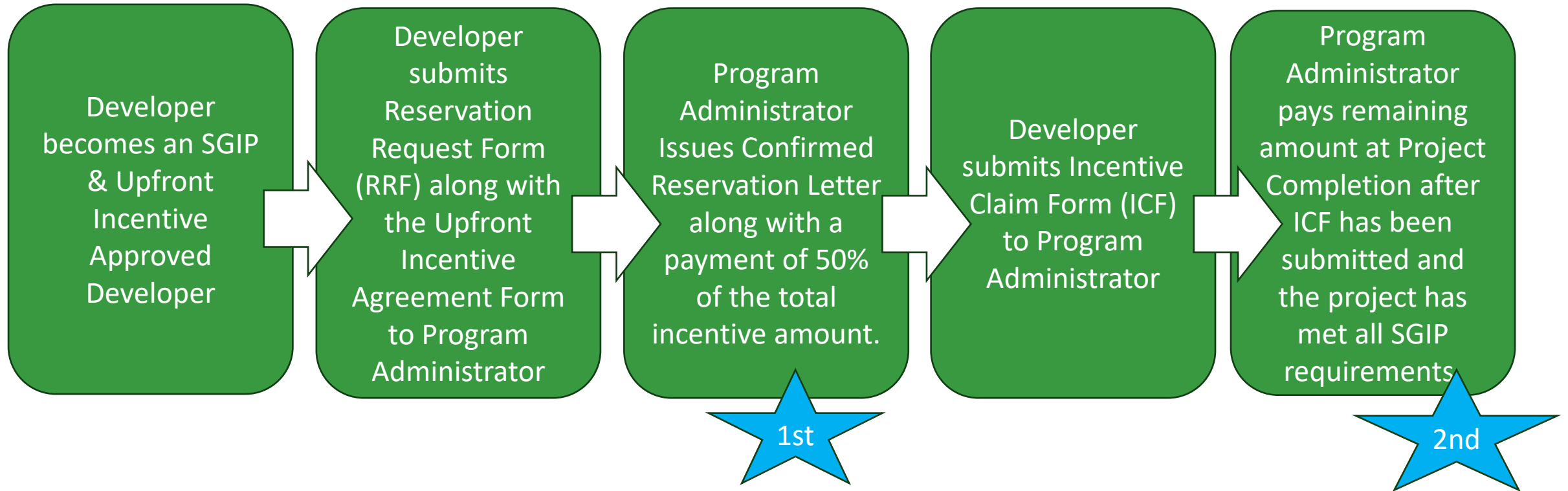
D.24-03-071

- Introduces the SGIP Upfront Incentive Component for the Residential Solar and Storage Equity Budget
- Requests that the SGIP Program Administrators hold a Workshop to share details of the proposal
- Requires the SGIP PAs file a Tier 2 AL no later than June 20th.
- Upfront Incentive Program modeled after the PG&E Incentive Advance Pilot

SGIP Upfront Proposal: Two-Step payment process



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SGIP Upfront Proposal: Developer Enrollment Form



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Self-Generation Incentive Payment (SGIP) Developer Enrollment Form For Pacific Gas and Electric Company (PG&E) Incentive Advance Pilot (Pilot)

PG&E's Pilot provides SGIP Developers supporting eligible SGIP projects for customers vulnerable to Public Safety Power Shutoffs (PSPS) events or customers that have upfront cost barriers the opportunity to receive 50% of the project's incentive in advance (Incentive Advance).

Eligible Project/Host Customers: Residential Customer projects that either qualify for the Equity budget or the Equity Resiliency Budget by means of the Medical Baseline enrollment or having notified PG&E of reliance on lifesaving medical equipment.

Qualified SGIP Developers: SGIP Developers must be licensed, in good standing under SGIP; provide a 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 and Business Auto Insurance shall be at least as broad as the Insurance Services Office (ISO) Business Auto Coverage form covering Automobile Liability, code 1 "any auto" and which shall not be less than \$1,000,000 each accident for bodily injury and property damage; and submit their rating status on the Better Business Bureau (BBB) website. SGIP Developers annually must furnish PG&E with proof of their license, Certificate(s) of Commercial General Liability and Auto Business Insurance and their BBB status to continue to participate in the Pilot.

SGIP Developer and Host Customer Pilot Agreement: Qualifying SGIP Developers and Host Customer for the SGIP eligible project must agree and sign the attached PG&E Pilot Agreement that outlines the Pilot participation terms and conditions to receive the Incentive Advance.

SGIP Developer Pilot Qualification: Interested SGIP Developers must submit the information below via email to Ozzy Guzman at Ozzy.Guzman@pge.com. Upon receipt and in PG&E in its sole discretion, PG&E will notify the SGIP Developer within 15 business days about their eligibility to participate.

SGIP Developer Name	
SGIP Developer Contact Information: Address, phone, email	
Copy of License Designation and Number	

Copy Certificate(s) of Commercial General Liability and Business Auto Insurance	
Copy of SGIP Developers rating status at the Business Better Bureau website at www.bbb.org	

Referral Information provided to organizations supporting SGIP projects. PG&E will provide the SGIP Developer provided contact information and other details specified by the SGIP Developer below. Developer agrees to allow PG&E to share data for Pilot reporting and outreach.

	SGIP Developer Name	Geographical City and County Coverage	Special Notes	Contact Information for Entities to connect
1				

SGIP Upfront Proposal: Developer Enrollment



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- Must be on the SGIP Approved Developer List
- Submit an Upfront Incentive Developer Enrollment Form
- In good standing under SGIP
- Provide 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.
- Business Auto Insurance shall not be less than \$1,000,000 each accident for bodily injury and property damage.

SGIP Upfront Proposal: Developer Enrollment (Cont.)



- Submit their rating status with the Better Business Bureau (BBB)
- Agree to submit an Upfront Incentive Agreement Form for each project
- Not be in the process of dissolving/ filing for Bankruptcy
- CAP: No more than 20 projects per Developer at one time
- Annual recertification

SGIP Upfront Proposal: Developer Provisions for Non-Performance



- Non-Performance may include the following:
 - Upfront Incentive Developer does not submit SGIP paperwork in a timely manner
 - Developer does not reimburse the respective PA in a timely manner
 - Developer becomes unresponsive
 - Developer goes into the process of dissolving their company
 - Developer files for Bankruptcy

SGIP Upfront Proposal: Developer Provisions for Non-Performance (Cont.)



Developers found to be out of compliance in accordance to the Upfront Incentive Rules may face the following:

- Request from the respective SGIP PA for financial reimbursement of the Upfront Incentive.
- SGIP Infraction and Issuance of Warning Process
 - SGIP Handbook sect. 13.2 and 13.2.1
- Removal from future SGIP Upfront Incentive Participation.
- Potential removal from future participation in SGIP.

SGIP Upfront Proposal: Upfront Incentive Agreement Form



- Advises all terms and conditions under SGIP Contract must be met.
- Customer agrees to assign Upfront Incentive to Developer.
- Customer agrees to let SGIP PA know if they transfer their project to a different Developer.
- Parties agree the project will receive the final payment at project completion.

SGIP Upfront Proposal: Upfront Incentive Agreement Form (cont.)



- Developer agrees not to charge the customer any of out pocket costs prior to the entire SGIP project incentive being paid or there after
- Developer agrees it will not sell the customer a residential storage system that receives incentives for a total price (before incentive) that is greater than the price they would sell a comparable system that is not eligible to receive the upfront incentive.

SGIP Upfront Proposal: Upfront Incentive Agreement Form (cont.)



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- Developer agrees to complete the project no later than 90 days from the date of the Upfront Incentive payment
- Developer agrees to pay back the upfront incentive if 90-day requirement is not met or as approved to in writing
- SGIP PA reserves the right to offset the amount against other costs owed to Developer.
- Parties agree Developer may be permanently barred from future upfront incentive participation if noncompliance to terms and conditions.

SGIP Upfront Proposal: Program Administrator Reimbursements



The following conditions are set forth regarding Upfront Incentive Payments that are Canceled or withdrawn:

- Upfront Incentive Payment will not be transferred to another project for the same developer.
- Developer must pay back incentive within 30 days.
- Developer must pay back the upfront incentive directly to the respective SGIP PA.



Discussion / Questions?



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Q & A



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Thank You