

2021 - 2022 SGIP PROGRAM ADMINISTRATOR PERFORMANCE

Submitted to:
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SGIP Working Group

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TABLE OF CONTENTS

1 EXECUTIVE SUMMARY	1
1.1 SGIP PARTICIPATION AND BUDGET	1
1.2 EVALUATION FINDINGS	4
2 INTRODUCTION.....	8
2.1 PROGRAM OVERVIEW	8
2.1.1 Program Changes During 2021 and 2022	8
2.1.2 Budget.....	9
2.2 PROGRAM PARTICIPATION DURING 2021 AND 2022.....	11
2.2.1 Study Population.....	12
2.3 EVALUATION GOALS.....	13
2.4 REPORT CONTENTS	14
3 DATA AND METHODS	15
3.1 PROGRAM ADMINISTRATOR IN-DEPTH INTERVIEWS	15
3.2 APPLICANT SURVEY.....	15
3.2.1 Sample Design	16
3.3 HOST CUSTOMER SURVEY.....	19
3.3.1 Sample Design.....	19
4 EVALUATION RESULTS.....	22
4.1 OVERVIEW OF PARTICIPANT EXPERIENCE	22
4.1.1 Participation Timeline.....	23
4.1.2 Program and Communication Clarity.....	24
4.1.3 Interactions with Program Administrators.....	35
4.1.4 Specific Program Elements.....	47
4.2 OVERALL PARTICIPANT SATISFACTION	52
4.2.1 Satisfaction with Program Administrator	52
4.2.2 Satisfaction with Program Application Steps	54
4.3 EXPERIENCE SGIP AND THE INVESTMENT TAX CREDIT (ITC).....	59
APPENDIX A SURVEY INSTRUMENTS.....	62
A.1 2021-2022 SGIP PA IN-DEPTH INTERVIEW GUIDE	63
A.2 APPLICANT SURVEY INSTRUMENT	65
A.3 HOST CUSTOMER SURVEY INSTRUMENT.....	83
APPENDIX B APPLICANT AND HOST CUSTOMER SURVEY QUOTAS AND COMPLETES BY PA.....	98
B.1 APPLICANT SURVEY STRATA QUOTAS AND COMPLETES BY PA.....	98
B.2 HOST CUSTOMER SURVEY STRATA QUOTAS AND COMPLETES BY PA	101
APPENDIX C SELECT HOST CUSTOMER SURVEY RESPONSE TABLES BY PROGRAM YEAR.....	105



APPENDIX D APPLICANT SURVEY RESPONSE FREQUENCIES..... 106

APPENDIX E HOST CUSTOMER SURVEY RESPONSE FREQUENCIES 107



LIST OF TABLES

Table 1-1: Statewide SGIP Budget and Program Administrator Allocations.....	2
Table 1-2: Applications Submitted in 2021 and 2022 by PA and Budget Category.....	3
Table 2-1: Statewide SGIP Budget and Program Administrator Allocations.....	9
Table 2-2: SGIP 2020-2024 Incentive Allocation.....	10
Table 2-3: SGIP Application, Applicant, and Host Customer Count by Program Administrator	12
Table 2-4: Count of Applicants and Host Customers with Applications in Multiple PA Territories	12
Table 3-1: Target and Achieved Applicant Sample by Program Administrator and Program Year	16
Table 3-2: Prolific Applicant Population and Number of Completes by Program Administrator	17
Table 3-3: Applicant Survey Strata Quota Across all PAs.....	18
Table 3-4: Target Host Customer Sample Size by Program Year and Program Administrator.....	19
Table 3-5: Host Customer Population and Survey Completes by Program Year	21
Table 4-1: Host Customer Clarity with Program Aspects	28
Table 4-2: Common Reasons for Lack of Host Customer Clarity by Program Aspect (Rating 1 or 2).....	29
Table 4-3: Host Customer Satisfaction with Program Communications Regarding the SGIP	32
Table 4-4: Reasons for Host Customer Dissatisfaction with PA and Applicant Communication	33
Table 4-5: Host Customer Rating of their Understanding of the Impact of the TOU Rate Requirement on Utility Bills.....	35
Table 4-6: Applicant Reported Change in Timeliness, Helpfulness, and Accessibility Satisfaction Levels in 2021-2022 vs. Prior Years	38
Table 4-7: Applicant Satisfaction with PA Timeliness by Evaluation Year.....	40
Table 4-8: Reasons Provided for Dissatisfaction with the PAs' Timeliness (Rating 1 or 2).....	41
Table 4-9: Applicant Satisfaction with PA Helpfulness by Evaluation Year	44
Table 4-10: Reasons Provided for Dissatisfaction with the PAs' Helpfulness (Rating 1 or 2).....	44
Table 4-11: Applicant Satisfaction with PA Involvement in Resolved Suspended Projects	45



Table 4-12: Applicant Satisfaction with Program Administrator Accessibility by Evaluation Year	47
Table 4-13: Applicant and Host Customer Website Use.....	48
Table 4-14: Reasons for Satisfaction or Dissatisfaction with SGIP Websites.....	49
Table 4-15: Applicant Overall Satisfaction with Program Administrator	52
Table 4-16: Reasons for Dissatisfaction with the Program Administrator (Rating 1 or 2).....	53
Table 4-17: Host Customer Overall Satisfaction with Program Administrator	54
Table 4-18: Applicant Satisfaction with Application Submission Process	55
Table 4-19: Reasons for Dissatisfaction with the Application Submittal Process (Rating 1 or 2)	55
Table 4-20: Applicant Satisfaction with Paperwork Requirements for PPM	56
Table 4-21: Applicant Satisfaction with Paperwork for Incentive Claim Stage	56
Table 4-22: Applicant Satisfaction with Inspection Scheduling.....	57
Table 4-23: Host Customer Satisfaction with Inspection Scheduling	57
Table 4-24: Applicant Satisfaction with Time to Receive Incentive	58
Table 4-25: Host Customer Satisfaction with Time to Receive Incentive.....	58
Table 4-26: Applicant Satisfaction with Performance-Based Incentive Payment Process.....	59
Table B-1: PG&E Applicant Survey Strata Quota	98
Table B-2: SCE Applicant Survey Strata Quota.....	99
Table B-3: SCG Applicant Survey Strata Quota	99
Table B-4: CSE Applicant Survey Strata Quota.....	100
Table B-5: PG&E Host Customer Strata Quota, 2021 - 2022	101
Table B-6: SCE Host Customer Strata Quota	102
Table B-7: SCG Host Customer Strata Quota	103
Table B-8: CSE Host Customer Strata Quota	104
Table C-1: Host Customer Clarity with Program Aspects	105

Table C-2: Host Customer Satisfaction with Program Communication 105

LIST OF FIGURES

Figure 1-1: Annual Application Volume by Budget Category, 2018-2022 2

Figure 1-2: Applications by Program Administrator, 2019-2022 4

Figure 4-1: SGIP Application Process 22

Figure 4-2: Annual Application Volume by Budget Category, 2018-2022 23

Figure 4-3: Two-Step and Three-Step Process Average Time (in Days) Spent within each Step by Program Year 24

Figure 4-4: Applicant's Typical Number of Clarifying Questions for the Program Administrator 25

Figure 4-5: Comparison of Clarifying Questions in 2021 or 2022 to Previous Years 26

Figure 4-6: Types of Questions Applicants Asked Program Administrators 27

Figure 4-7: Host Customer Clarity with Program Aspects by their Applicant's Prolific Status 30

Figure 4-8: Host Customer Clarity with Program Aspects by Budget Group, 2021-2022 – Part 1 31

Figure 4-9: Host Customer Clarity with Program Aspects by Budget Group, 2021-2022 – Part 2 31

Figure 4-10: Host Customer Satisfaction with PA and Applicant Information by Prolific Status 34

Figure 4-11: Host Customer Satisfaction with Information Provided by the PA and Applicant by Budget Group 34

Figure 4-12: Applicant Satisfaction with Accessibility, Helpfulness, and Timeliness by PA 36

Figure 4-13: SGIP Applications by Program Administrator, 2019 - 2022 37

Figure 4-14: Applicant Satisfaction with PA Timeliness, Helpfulness, Accessibility, and Overall by Prolific Status 39

Figure 4-15: Applicant Satisfaction with PA Timeliness, Helpfulness, Accessibility, and Overall by Budget Group 40

Figure 4-16: Applicant Reported Average Time for Initial Reply to Inquiry by PA 41

Figure 4-17: Applicant Reported Longest Time for Initial Reply to Inquiry by PA 42



Figure 4-18: Applicant Reported Longest Time to Resolve Issue by PA.....	43
Figure 4-19: Host Customer Reported Time to Resolve Issues by PA	43
Figure 4-20: Host Customer Recollection of Problems, Issues, or Delays by PA.....	45
Figure 4-21: Resolution of Host Customer Issues, Problems, or Delays by PA.....	46
Figure 4-22: Applicant and Host Customer Ratings of Website Usefulness.....	49
Figure 4-23: Applicant Participation at Quarterly Workshops in 2021-2022.....	50
Figure 4-24: Applicant Reasons for Attending and Not Attending Office Hours	51
Figure 4-25: Applicant Overall Satisfaction with PA Compared to Prior Years	54
Figure 4-26: Share of Applicants and Host Customers Receiving Guidance on Claiming the ITC	59
Figure 4-27: Applicants' Cost Basis Advice to Customers Claiming the ITC.....	60
Figure 4-28: Share of Host Customers who Applied for the ITC and Cost Basis used for the ITC.....	61

1 EXECUTIVE SUMMARY

California’s Self-Generation Incentive Program (SGIP) provides financial incentives for the installation of distributed generation and energy storage technologies that meet all or a portion of a customer’s electricity needs. The SGIP is funded by California’s ratepayers and managed by Program Administrators (PAs) representing California’s major investor-owned utilities (IOUs). The PAs are Pacific Gas and Electric Company (PG&E), Southern California Edison (SCE), Southern California Gas Company (SCG), and the Center for Sustainable Energy (CSE), which implements the program for customers of San Diego Gas & Electric (SDG&E). The California Public Utilities Commission (CPUC) provides oversight and guidance on the SGIP.

The CPUC measurement and evaluation plan calls for “an annual review of the administrative performance of each PA.¹ The reports are to include, at minimum, a survey of program participants regarding the PAs’ clarity and timeliness of oral and written communications, their accessibility, their helpfulness to applicants submitting and processing applications, and the clarity and helpfulness of their websites.” This report is an assessment of PA performance during 2021 and 2022.

Key findings of this evaluation were informed by data collected through interviews and surveys with representative samples of SGIP applicants², host customers³, and PA staff.

1.1 SGIP PARTICIPATION AND BUDGET

Evaluation findings should be considered within the context of the size of each PA’s service territory, the PA’s allocated SGIP budget and annual volume of applications. Figure 1-1 below shows the annual volume of SGIP applications received across all PAs by budget category since 2018.⁴ As this table shows, the volume of SGIP applications increased significantly in PY 2020 when the Equity Resiliency budget opened and has since dropped off in PY 2021 and again in PY 2022.

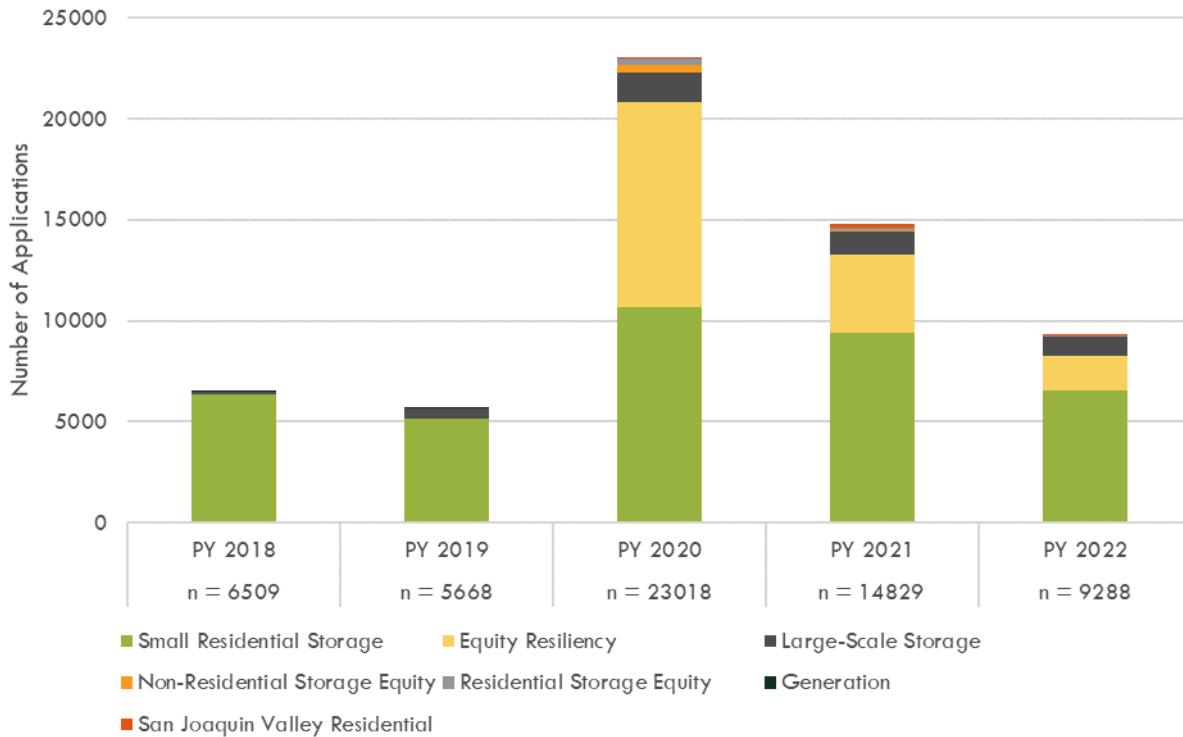
¹ The CPUC SGIP measurement and evaluation plan is published on the CPUC website. <https://www.cpuc.ca.gov/-/media/cpuc-website/divisions/energy-division/documents/self-generation-incentive-program/sgip-final-2021--2025-me-plan.pdf>

² The applicant is the person or entity that is responsible for completing and submitting the SGIP application and serves as the main point of contact for the SGIP PA throughout the application process.

³ Host Customer is the electric or gas distribution customer (industrial, agricultural, commercial, or residential) that is eligible to receive incentives from the SGIP.

⁴ A snapshot of the program tracking data was taken on February 16, 2023.

FIGURE 1-1: ANNUAL APPLICATION VOLUME BY BUDGET CATEGORY, 2018-2022



The authorized incentive collections through the end of 2024 total \$813,400,000.⁵ Table 2-1 summarizes the allocation for each PA. The relative share of SGIP funds across PAs is based on the size of the PA’s IOU service territory. As a result, the largest shares of incentive funds are allocated to PG&E and SCE. Combined, PG&E and SCE are allocated 78 percent of incentive funds. PA administration budgets are also tied to the allotted authorized incentive collections. Administration budgets are 7 percent of authorized collections for PG&E, SCE and SCG and 10 percent for CSE.

TABLE 1-1: STATEWIDE SGIP BUDGET AND PROGRAM ADMINISTRATOR ALLOCATIONS

Program Administrator	Authorized Incentive Collections	% of Total Authorized Incentive Collections*
PG&E	\$360,000,000	44%
SCE	\$280,000,000	34%
SCG	\$74,400,000	9%
CSE	\$99,000,000	12%

*Percentages do not sum to 100 due to rounding.

Table 1-2 summarizes the volume of applications received by each PA and budget category in 2021 and

⁵ SGIP 2023 Handbook v2 Section 1.1

2022. PG&E received the highest volume of applications in Program Year (PY) 2021 and SCE received the highest volume of applications in PY 2022. SCG received the smallest number of applications in both PY 2021 and PY 2022⁶. In both program years, the majority of applications were for projects in the Small Residential Storage budget category, followed by the Equity Resiliency budget category. Application volumes for the Large-Scale Storage, Non-Residential Storage Equity, Residential Storage Equity, and San Joaquin Valley Residential budget categories all decreased from 2021 to 2022, and Generation applications held steady at 9 applications in both program years.

TABLE 1-2: APPLICATIONS SUBMITTED IN 2021 AND 2022 BY PA AND BUDGET CATEGORY

PY	PA	Equity Resiliency	Large-Scale Storage	Non-Res Storage Equity	Res Storage Equity	Small Res Storage	Generation	SJV Res	Total	% of Total
2021	PG&E	801	569	41	19	5,318	3	185	6,936	47%
	SCE	1,970	294	18	22	1,843	6	4	4,157	28%
	SCG	549	84	1	91	657	0	0	1,382	9%
	CSE	563	178	8	1	1,604	0	0	2,354	16%
	Total	3,883	1,125	68	133	9,422	9	189	14,829	--
2022	PG&E	734	424	4	20	1,770	5	3	2,960	20%
	SCE	619	260	7	12	3,631	2	11	4,542	31%
	SCG	169	113	14	0	291	1	0	588	4%
	CSE	219	120	0	0	858	1	0	1,198	8%
	Total	1,741	917	25	32	6,550	9	14	9,288	--

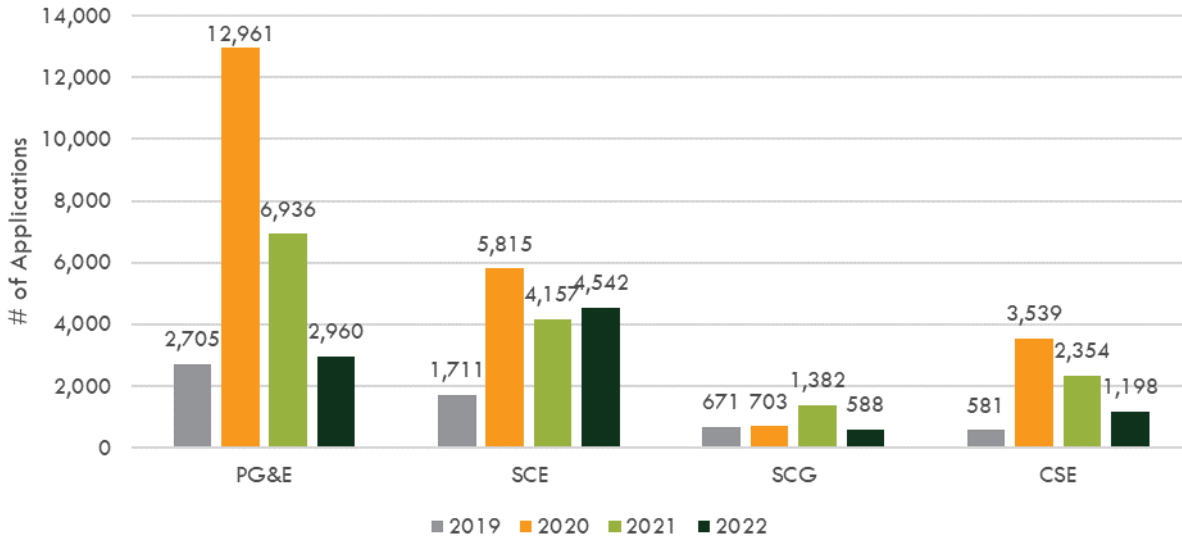
Figure 1-2 graphically displays each PA's total application volume across all budget categories. As this figure shows, PG&E and CSE saw their volume of applications submitted drop by nearly 50% in 2021 (over 2020) and then by another 50% in 2022. SCE and SCG saw smaller nominal year over year changes, but both had fewer applications submitted in 2022 than they had in 2020. (However, the number of SCG applications roughly doubled between 2020 and 2021). While these reductions are significant it is important to note that 2020 saw a significant increase in application volume over 2019 when additional SGIP funding in 2020 became available.

Application decreases in 2021 and 2022 are related to SGIP budget categories becoming fully subscribed, especially the Equity Resiliency budget category. Shortly after the new funding cycle the equity resiliency budget category became fully subscribed and new applications were put on a waitlist. The last step

⁶ SGIP funding across PAs is based on the size of the PA's IOU service territory. The share of projects by PA is consistent with the share of allocated authorized incentives.

opening (Step 5) for the Equity Resiliency budget occurred on March 16th, 2020. As of the finalization of this report, the equity resiliency budget category is waitlisted across all PAs.

FIGURE 1-2: APPLICATIONS BY PROGRAM ADMINISTRATOR, 2019-2022



1.2 EVALUATION FINDINGS

The key evaluation findings related to overall SGIP participant and applicant satisfaction of PA timeliness, accessibility, and helpfulness during the application process are presented below. These findings illustrate the strengths and weaknesses of the PA communication processes as perceived by SGIP applicants and host customers and changes in participant ratings of PA performance since the prior PA evaluation which covered program year 2020.

The changes in participant satisfaction with the PAs for PY 2021 and PY2022 years have, in most cases, been minor and satisfaction in most areas has been moderate (averaging in the mid-3's on a 1-5 scale). The next PA evaluation (of the 2023 program year) taking place in early 2024 will be paired with an in-depth process evaluation of the SGIP that will dig deeper into areas where the program has continued to be burdensome to participants (often outside of the PAs' control). The process evaluation will seek to develop broader, actionable recommendations for SGIP improvements (beyond PA performance) that can be deployed in tandem with the planned restructuring and expansion of the SGIP in response to AB 209.

Overall satisfaction with the PA

- **Applicants and host customers continue to report moderate levels of satisfaction with the PAs.** Applicants' overall satisfaction ranged from 3.2 to 4.1 and host customers ranged from 3.1 to 3.6.

- **SCG applicants continue to report the highest levels of satisfaction with their PA**, with no applicants rating SCG a 1 (on a 1-5 scale).
- **PG&E applicants and host customers both saw increases in overall satisfaction with the PA**, bringing them closer into alignment with the other PAs.

Timeliness of PA communications

- **Applicants' satisfaction with the timeliness of PA communications has remained fairly steady since 2020.** PG&E applicants were the only ones to report a significant increase in satisfaction in PA timeliness (increasing from 1.8 to 3.0), likely due to the reduction in application volume, tracking of the 10-day minimum response time, and the introduction of office hours during program year 2020.
- **Reasons for applicant's dissatisfaction with PA's communications were the lack of a response, untimely responses, and unhelpful or unclear responses that lead to additional project delays.**
- **Across all PAs, most applicants (89%) reported the average time to an initial reply to an inquiry was within 10 days** as required by SGIP policy and only 10% reported the longest time to reply was more than a month. All PAs indicated that they closely track this metric in the PA in-depth interviews.
- **Applicants reported an improvement in their PA's time to resolve issues, however host customers reported PAs took longer than in 2020.** 68% of applicants reported PAs resolved their issues in less than a month, while 59% of host customers reported it took PAs longer than a month for a resolution. Nearly 20% of PG&E and CSE applicants have waited over 6 months for issue resolution.
- **Recommendations to improve PA timeliness** → improve clarity of responses to facilitate rapid resolution of application issues, continue to track response timelines, and proactively reach out to applicants who have issues that are not resolved within one month.

Accessibility of PAs

- **Applicants reported increased satisfaction with the accessibility of PG&E, SCE, and CSE in 2021/2022. SCG continues to rank the highest on accessibility (4.2 out of 5).**
- **PG&E and SCE increased their accessibility in 2021 by providing office hours.** 46% of PG&E and SCE applicant respondents reported attending office hours.
- **PA-sponsored workshops and office hours are opportunities for SGIP participants to directly engage with SGIP PAs, however more than half of applicants lack awareness of these opportunities.** 58% of applicants lacked awareness of workshops and 55% lacked awareness of office hours.
- **Recommendations to improve PA accessibility** → increase participant awareness of the opportunities to engage directly with PAs, such as quarterly workshops and office hours. Availability of these PA resources could be highlighted on PA websites which are frequently visited by applicants and host customers.

Clarity and Helpfulness of PAs

- **Applicant satisfaction with PA helpfulness increased significantly for PG&E in 2021/2022 (from 2.5 to 3.5) and is now in line with the other PAs.** Ratings for the other PAs were consistent with 2020.

- **PG&E and SCE office hours are rated as very helpful to those who attend them.** Applicants reported attending office hours to resolve application issues and ask clarifying questions about program requirements. Satisfaction with office hours was rated 4.1 out of 5.
- **The share of applicants visiting the PAs' SGIP websites increased** in 2021/2022, signifying these websites were a more important resource for applicants in recent years.
- **Host customers reported infrequent use of the statewide portal (www.selfgenCA.com)** and often were unclear on the status of their application. Host customers should continue to be made aware of the “*Check My Application Status*” feature available on the statewide portal.
- **Workshops continue to have moderate satisfaction ratings (3.4 out of 5)** amongst applicants who attended them. Several applicants noted the workshops were more accessible since adding an option for online attendance.
- **Recommendations to improve PA helpfulness →**
 - **CSE and SCG should consider hosting office hours.** While these PAs generally have a lower application volume than the other PAs, applicants reported often attending workshops to ask the PAs specific questions about their applications. Additionally, applicants were generally more satisfied with office hours than SGIP workshops and several applicants noted the SGIP is a difficult program to navigate without specific program expertise. Reduced frequency of office hours may be appropriate for CSE and SCG, however providing office hours near step openings would increase PA accessibility and helpfulness.
 - **SGIP PA websites should continue to be regularly updated with materials related to the application submission process, recent program changes, and quarterly workshop recordings.** A higher share of applicants reported visiting PA websites than in prior years and often visited them looking for SGIP assistance and resources. Almost half of applicants reported learning about SGIP program changes through the PA websites.
 - **Enhance clarity and consistency in communications with participants regarding their applications.** Again in 2021/2022, applicants and host customers reported confusion with information received from their PA, especially true for new SGIP applicants. Several applicants noted the SGIP is an extremely time-consuming process and there was a lack of clarity regarding reviving suspended applications. PAs that hold office hours should notify applicants with suspended projects or rejected paperwork about the availability of office hours.
 - **Continue to reinforce to applicants the importance of effective communication with host customers about the SGIP application process and available resources.** Applicants are often host customers' primary point of contact during the application process. While host customers' satisfaction with applicant communications were generally good (from 3.4 to 3.6 depending on PA), host customers frequently reported having challenges with applicant communications. Challenges include insufficient information from applicants and the role of the SGIP in their project's development was not adequately explained.

Average Participation Timeline

- **Average time to complete the SGIP application process has decreased from 2021 to 2022.** Two-step



process – decreased from 276 days in 2021 and 128 days in 2022. Three-step process - decreased from 346 days in 2021 and 206 days in 2022.

Primary sources of SGIP awareness and program changes

- **Most host customers first learned about the SGIP through their project developer or a vendor/installer (63%).** Other sources of SGIP awareness were online research (15%) and word of mouth from friends or family (11%).
- **Applicants reported receiving program updates from a variety of sources.** Most notably, through the application portal (51%), websites updates (46%), the SGIP handbook (43%), and email (41%).
- **Nearly all host customers reported receiving program updates by email (80%).**
- **Only half (56%) of host customers were aware they may be required to switch to an SGIP-approved electricity rate.** Some host customers reported switching to an SGIP-approved rate was a point of confusion during the application process. Roughly 25% of host customers stated that they had a poor understanding of the impact switching to an SGIP-approved rate would have on their electric bill.

2 INTRODUCTION

California's Self-Generation Incentive Program (SGIP) provides financial incentives for the installation of distributed generation and energy storage technologies that meet all or a portion of a customer's electricity needs. The SGIP is funded by California's ratepayers and managed by Program Administrators (PAs) representing California's major investor-owned utilities (IOUs). The PAs are Pacific Gas and Electric Company (PG&E), Southern California Edison (SCE), Southern California Gas Company (SCG), and the Center for Sustainable Energy (CSE), which implements the program for customers of San Diego Gas and Electric (SDG&E). The California Public Utilities Commission (CPUC) provides oversight and guidance on the SGIP.

2.1 PROGRAM OVERVIEW

The SGIP was originally designed in 2001 in response to the California electricity crisis. Since then, the SGIP has undergone numerous revisions to its incentive levels, eligibility rules, application process, and technology offerings. SGIP Handbooks⁷ describe the application process, technology eligibility requirements, and incentive levels applicable to projects submitting applications during Program Years (PY) 2021 and 2022.

2.1.1 Program Changes During 2021 and 2022

Several changes were made to the SGIP budget, rules, and requirements during 2020. Among these changes was the creation of an additional budget category set aside for equity resiliency, new greenhouse gas (GHG) reporting rules, and the requirement for residential SGIP participants to switch to time-of-use (TOU) rates. In contrast, program changes implemented during 2021 and 2022 were minor and focused on program streamlining. During 2021 and 2022, the PAs mostly focused on application processing and minor program reforms (described below).

- **Remove pause on generation projects.** CPUC Decision (D.) 21-06-005 (June 4, 2021) terminated a pause on acceptance of applications for renewable generation technology projects using a control/use/destroy baseline as adopted in D. 20-01-021. It also limits eligible directed renewable fuels to those produced within California and strengthens renewable fuel documentation, verification, auditing, and enforcement requirements.
- **COVID-19 relief.** CPUC D. 21-03-008 and D. 21-03-009 provided interim relief to customers who have been affected by the COVID-19 pandemic by staying the cancellation of projects past their third extension and pausing performance-based incentive (PBI) calculations.

⁷ The SGIP Handbook is updated regularly and available at: <https://www.selfgenca.com/home/resources/>

- **Eligibility for new technologies.** SCG Advice Letter (AL) 5750-G modified eligibility for large thermal energy storage (LTES) systems. PG&E AL 4576-G allowed participation by Linear Generators with load-following capabilities. CPUC D. 22-04-036 created the Heat Pump Water Heater (HPWH) budget category, which is managed by a single third-party PA and not within the scope of this evaluation.
- **Application timeline report.** CPUC D. 20-01-02 directed the PAs to adequately staff the SGIP with sufficient resources to advance an incentive form the time of its submittal to “in review” status within 10 days, and to fully process incentive applications, excluding the time the application is in suspended status, within approximately 45-60 days, on average. This new requirement was first implemented during 2020 and reporting of this metric was first required in 2021.
- **Modified inspection protocol.** PG&E AL 4644 modified the inspection protocol, lowered the sampling rate, and resulted in fewer inspections statewide.
- **Streamlined handbook initiative.** The Program Administrators worked to streamline the SGIP Handbook throughout 2022. The objectives were to improve Handbook readability and comprehension by clarifying policies and eligibility requirements. Streamlining was completed and the Handbook was submitted for CPUC review in late Q1 2023.

2.1.2 Budget

The authorized incentive collections through the end of 2024 total \$813,400,000.⁸ Table 2-1 summarizes the allocation for each PA. The relative share of SGIP funds across PAs is based on the size of the PA’s IOU service territory. As a result, the largest shares of incentive funds are allocated to PG&E and SCE. Combined, PG&E and SCE are allocated 78 percent of incentive funds. SGIP administration budgets are also tied to the allotted authorized incentive collections. Administration budgets are 7 percent of authorized collections for PG&E, SCE and SCG and 10 percent for CSE.

TABLE 2-1: STATEWIDE SGIP BUDGET AND PROGRAM ADMINISTRATOR ALLOCATIONS

Program Administrator	Authorized Incentive Collections	% of Total Authorized Incentive Collections*
PG&E	\$360,000,000	44%
SCE	\$280,000,000	34%
SCG	\$74,400,000	9%
CSE	\$99,000,000	12%

*Percentages do not sum to 100 due to rounding.

Incentive allocations by budget category for the 2020-2024 SGIP budget cycle are shown in Table 2-2 below (as outlined in the SGIP 2023 Handbook v2).

⁸ SGIP 2023 Handbook v2 Section 1.1

TABLE 2-2: SGIP 2020-2024 INCENTIVE ALLOCATION

Budget Category	Budget Grouping	Share of Allocated Budget	Share of Allocated Budget Sub Grouping
Large Scale Storage	Energy Storage	88%	10%
Small Residential Storage			7%
Residential Equity			3%
Non-residential Equity			0% ⁹
Equity Resiliency			63%
San Joaquin Valley Pilot			0% ¹⁰
Heat Pump Water Heater			5%
Generation	Generation	12%	12%

The energy storage budget is broken out into seven budget categories:

1. **Large-Scale Storage:** Non-residential projects or residential projects greater than 10 kW.
2. **Small Residential Storage:** Residential projects less than or equal to 10 kW.
3. **Residential Equity:** Single-family low-income housing or multi-family low-income housing, regardless of project size. The stated objective of the equity budget is to: 1) bring positive economic and workforce development opportunities to disadvantaged communities, 2) reduce the need to operate conventional gas facilities in these communities due to poor air quality, and 3) to ensure disadvantaged customers have access to energy storage resources incentivized through SGIP.
4. **Non-Residential Equity:** Local, state, or tribal government agencies, educational institutions, non-profit organizations, or small businesses. Additionally, the project site must either be located in or provide service to a disadvantaged community.
5. **Equity Resiliency:** Intended for vulnerable households located in Tier 2 and Tier 3 High Fire Threat Districts (HFTDs) or customers who have been subjected to two or more Public Safety Power Shutoff (PSPS) events, critical services facilities serving those districts, and customers located in those districts that participate in low-income programs.
6. **San Joaquin Valley Pilot:** The San Joaquin Valley assigned commissioner’s ruling reasoned that a dedicated SGIP budget for the pilot communities would improve the reliability of electric service and would strengthen community resiliency in the face of extended electric outages.

⁹ From SGIP 2023 V2 Handbook: 2020-2024 authorized collections suspend further collections for non-residential equity storage once existing carryover is exhausted.

¹⁰ From SGIP 2023 V2 Handbook: Pursuant to D.19-09-027, San Joaquin Valley Pilot Program has a \$10 million set-aside funded from SCE and PG&E’s unused non-residential equity budget.

- 7. Heat Pump Water Heaters:** To stimulate growth in the California heat pump water heater market, CPUC Decision 19-09-027, in September 2019, directed the transfer of \$4 million in accumulated unused incentive funds into a set-aside for heat pump water heaters for equity budget customers. Following this decision, the 2020-2024 budget defined in D.20-01-021 (issued January 2020) allocated 5% of the overall 2020-2024 budget to heat pump water heaters. CPUC D. 22-04-036 allocated an additional \$40M in Cap-and-Trade funds to the SGIP HPWH budget, which is administered separately by a single statewide PA. The SGIP HPWH program is considered out of scope for this evaluation.

In addition to the seven energy storage budget categories, the **generation budget** category offers incentives for technologies such as wind turbines, pressure reduction turbines, waste heat to power, combined heat and power, and fuel cells. All new generation projects must be 100 percent renewable.

2.2 PROGRAM PARTICIPATION DURING 2021 AND 2022

Two types of program participants were surveyed in this evaluation: host customers and applicants.

Host Customer

Any retail electric or gas distribution customer (industrial, agricultural, commercial, or residential) of PG&E, SCE, SCG, or SDG&E is eligible to be the host customer and receive incentives from the SGIP. The host customer is the exclusive incentive reservation holder who is party to the SGIP contract. The host customer has the authority to designate the applicant, system owner (if not host customer, e.g., a leased system), energy service provider, and/or developer.¹¹

Applicant

An applicant is the person or entity that is responsible for completing and submitting the SGIP application and serves as the main point of contact for the SGIP PA throughout the application process. Host customers may act as the applicant, or they may designate a third party to act as the applicant on their behalf.¹² In 2021 and 2022, less than one percent of host customers acted as their own applicant. The applicant is often also the project developer (the entity that holds the contract for purchase and installation of the system and/or alternative system ownership agreement with the host customer and handles the project's development activities).

¹¹ SGIP 2023 V2 Handbook: Section 4.1.1

¹² SGIP 2023 V2 Handbook: Section 4.1.3

2.2.1 Study Population

A copy of the SGIP statewide project list was downloaded from www.selfgenca.com on February 16th, 2023, which includes all applications submitted during 2021 and 2022 that are included in this evaluation. The study population includes all applications submitted in 2021 and 2022, as well as generation projects that were submitted prior to 2021 and progressed through the application process in 2021 or 2022 (e.g., moving from the reservation request phase to the proof of project milestone phase). Active applications in the Generation budget category from prior to 2021 are included to increase the number of generation touch points given the relatively small number of projects submitted in 2021 and 2022.

TABLE 2-3: SGIP APPLICATION, APPLICANT, AND HOST CUSTOMER COUNT BY PROGRAM ADMINISTRATOR

PA	Prior to PY 2021*			PY 2021			PY 2022		
	# Applications	# Applicants	# Host Customers	# Applications	# Applicants	# Host Customers	# Applications	# Applicants	# Host Customers
PG&E	4	3	4	6,936	175	5,676	2,960	202	2,773
SCE	4	4	4	4,157	167	3,048	4,542	151	4,225
SCG	1	1	1	1,382	81	1,112	588	76	533
CSE	--	--	--	2,354	92	1,949	1,198	89	1,077
Total	9	7	9	14,829	321	11,634	9,288	324	8,489

Note: A single applicant and host customer could have applications in multiple PAs. Therefore, the SGIP applicant total does not equal the sum of each PA's applicant subtotal.

*Generation projects only.

The study population includes a total of 24,126 SGIP applications submitted (20,519 non-cancelled) across all PA service territories (9 prior to 2021, 14,829 in 2021 and 9,288 in 2022). Of these, nearly all (24,110 applications) were for energy storage technologies. The breakdown of applications, applicants, and host customers included in this evaluation by PA and program year is shown in Table 2-3 above.

Some applicants and host customers have applications in multiple PA territories. Table 2-4 below shows a count of applicants and host customers with applications in a single PA territory, or two, three, or four territories. More than a quarter (29%) of applicants had applications in multiple territories, while host customers with applications in more than one PA territory was less than 1%.

TABLE 2-4: COUNT OF APPLICANTS AND HOST CUSTOMERS WITH APPLICATIONS IN MULTIPLE PA TERRITORIES

	1 PA	2 PAs	3 PAs	4 PAs	Total
# Applicants	329	79	33	22	463
# Host Customers	19,809	193	4	0	20,006

As shown in Figure 1-2 above, the year-over-year application volumes for PY 2021 and 2022 fell by one-

third across all PAs, with some individual PAs seeing their application volumes cut in half for 2021 and cut in half again for 2022. The exception to this was for SCE which experienced a small increase in applications in 2022 (after falling in 2021), and SCG whose applications nearly doubled in 2021 before falling significantly in 2022. As stated previously, the decrease in project applications results from some budget categories being fully or near fully subscribed during the course of the 2020-2024 funding cycle.

2.3 EVALUATION GOALS

The CPUC measurement and evaluation plan calls for “an annual review of the administrative performance of each PA. The reports are to include, at minimum, a survey of program participants regarding the PA’s clarity and timeliness of oral and written communications, their accessibility, their helpfulness to applicants submitting and processing applications, and the clarity and helpfulness of their websites.” This evaluation will be an assessment of PA performance for customers who submitted applications during 2021 or 2022, or generation customers who submitted applications prior to 2021 that made progress through the SGIP in 2021 or 2022. Additionally, the evaluation leveraged the opportunity to contact customers to collect qualitative information (e.g., satisfaction during outages, awareness of the Federal Investment Tax Credit) that will support Energy Division objectives and enhance annual impact evaluations.

The following section outlines the research questions that will be addressed by this evaluation.

Research Questions

PA Timeliness, Accessibility and Helpfulness

- What are the strengths and weaknesses of the PA communication processes as perceived by SGIP participants?
- How clear and timely are the communications from the PAs to SGIP participants?
- How accessible are the PAs to SGIP participants during the application process?
- How helpful are the PAs to applicants submitting and processing applications?
- How has the participant experience and satisfaction with the PA helpfulness, accessibility, and timeliness changed from previous program years?
- How much time do applications spend in various program phases/steps? How does this vary across budget categories and, if possible by technologies, and manufacturers?
- What improvements can be made to the administration of the SGIP with respect to PA timeliness, accessibility, helpfulness?

Websites, Workshops and Marketing

- How do participants hear about the SGIP?
- What marketing materials are available and how do they reach potential program participants?
- Do SGIP participants understand changes to the program eligibility?
- How clear and helpful are the SGIP and PA websites and how often are they used?
- How clear and helpful are quarterly workshops hosted by the PAs?

Other Topics

- What information is being communicated to SGIP participants about the Federal Investment Tax Credit (ITC), if any? What cost-basis is being reported by participants in ITC claims?

2.4 REPORT CONTENTS

The remainder of this report includes the following:

- **Section 3** describes the research methods and data sources used in this study.
- **Section 4** presents the findings from this evaluation regarding program clarity; interactions with PAs; resolution of problems, issues, or delays; and satisfaction with specific program elements.
- **Appendix A** presents the survey instruments used for the PA in-depth-interviews, and the Applicant and Host Customer web surveys.
- **Appendix B** presents the Applicant and Host Customer Survey Quotas and Completions by PA.
- **Appendix C** presents the select Host Customer Survey Responses by Program Year.
- **Appendix D** presents the Applicant survey response frequencies.
- **Appendix E** presents the Host Customer survey response frequencies.

3 DATA AND METHODS

This section summarizes the research activities and sources of data used in this study. The primary data sources used in this evaluation include:

Pre-existing data sources:

- The SGIP Statewide Project Database¹³ managed by the PAs.

Data from research activities:

- In-depth interviews (IDIs) conducted with PAs by Verdant evaluation staff (Section 3.1)
- Web surveys completed by SGIP applicants (Section 3.2)
- Web surveys completed by SGIP host customers (Section 3.3)

The research activities outlined above enabled the evaluation team to study participants' experience and perceptions of the program. In particular, the PA IDIs gave context to the evaluation team regarding administrative practices and changes to the program in 2021 and 2022. The surveys with applicants and host customers were the vehicles through which direct feedback was collected from program participants.

3.1 PROGRAM ADMINISTRATOR IN-DEPTH INTERVIEWS

Verdant conducted in-depth interviews with each of the four program administrators (PG&E, SCE, SCG, and CSE). The purpose of the PA in-depth interviews is to learn directly from each of the PAs about their administration of the program during 2021 and 2022. PAs were interviewed on various topics relating to program operations and management including staffing structure, program design, communications approaches, program challenges, and changes made to SGIP administration during this two-year period. The in-depth interviews provide Verdant with a deeper understanding of the interactions the PAs had with applicants and host customers. Special focus was given to understanding recent changes to SGIP administration, staffing, and marketing, education and outreach (ME&O) efforts. In addition to PA in-depth interviews, the CPUC was consulted to understand research priorities for this evaluation. Appendix A.1 presents the list of questions used to guide the PA interviews.

3.2 APPLICANT SURVEY

The applicant surveys were conducted using web surveys. All applicants in the population were contacted

¹³ Accessed February 16, 2023.

for surveying efforts. The applicant population was sent an initial email invitation to participate in the survey and non-prolific applicants¹⁴ who did not respond to the survey invite received up to two reminder emails. Prolific applicants who did not respond to the initial email invite were sent personalized emails from a Verdant staff member rather than an email directly from the survey platform (Qualtrics).

3.2.1 Sample Design

The sample design for the applicant survey was designed so results can be reported with high confidence for each individual PA. Sample sizes were estimated for each PA to enable reporting on 1-5 scalar satisfaction questions at a relative precision of 10% or better, measured at the 90% confidence interval (90/10), based on the observed coefficient of variation (COV) from the 2020 PA performance evaluation.¹⁵ Table 3-1 summarizes the applicant population, target sample, and achieved sample for each PA.

TABLE 3-1: TARGET AND ACHIEVED APPLICANT SAMPLE BY PROGRAM ADMINISTRATOR AND PROGRAM YEAR

Program Year	PA	Applicant Population ¹⁶	Applicant 90/10 Target Sample	Completes	Achieved RP ¹⁷
2021	PG&E	175	50	37	6.5%
	SCE	167	39	27	15.1%
	SCG	81	14	16	5.2%
	CSE	92	32	19	12.5%
2022	PG&E	202	50	40	8.2%
	SCE	151	38	31	15.5%
	SCG	76	14	17	5.5%
	CSE	89	32	17	15.4%

Surveyed applicants were asked to respond to questions about each PA they interacted with. In total 79 applicants completed the survey, which includes 67 applicants in 2021 and 74 applicants in 2022. While the desired sample targets were only met for SCG, the standard error for PG&E was smaller than anticipated and thus both PG&E and SCG achieved the targeted relative precision of less than 10%. While

¹⁴ Applicants that have 100 or more projects in PY 2021 and PY 2022 combined are referred to as “prolific” applicants.

¹⁵ Results from the PY 2020 applicant survey question: How satisfied are you with the SGIP overall (Please rate your satisfaction on a 1 to 5 scale, where 1 is not at all satisfied and 5 is extremely satisfied)?

¹⁶ A single applicant could have applications in multiple PA service territories or for multiple technology types. Therefore, the applicant population and target sample totals do not equal the sum of each PA’s subtotals.

¹⁷ Achieved relative precision was calculated from results of the applicant survey question: How would you rate your experience with [PA] overall, in relation to their role as an SGIP administrator in 2021/2022 (Please rate your satisfaction on a 1 to 5 scale, where 1 is not at all satisfied and 5 is extremely satisfied)?

SCE and CSE did not achieve the relative precision target, they did achieve response rates of nearly 20% of the 2022 Applicants. Response frequency tables for each closed-ended question in the applicant survey are included in Appendix D.

Prolific Applicants

Applicants that have 100 or more projects in PY 2021 and PY 2022 combined are referred to as “prolific” applicants. There are 36 applicants that meet this criterion, accounting for 83% of the applications submitted in 2021 and 2022. For Prolific applicants, Verdant attempted a census sample for this group. Table 3-2 shows the number of prolific applicants with applications in each PA territory and the number that completed surveys. The Verdant team completed surveys with 17 of the targeted prolific applicants.

TABLE 3-2: PROLIFIC APPLICANT POPULATION AND NUMBER OF COMPLETES BY PROGRAM ADMINISTRATOR

PA	PY 2021				PY 2022			
	Applicant Population	Applicant 90/10 Target Sample	Prolific Applicants	n Prolific Completes	Applicant Population	Applicant 90/10 Target Sample	Prolific Applicants	n Prolific Completes
PG&E	175	50	27	10	202	50	27	10
SCE	167	39	29	12	151	38	29	13
SCG	81	14	22	10	76	14	22	9
CSE	92	32	23	8	89	32	23	8

Note: A single applicant can have applications in multiple PAs. Therefore, several SGIP applicants and prolific applicants are counted more than once across PAs.

Strata Quota

Further strata were developed within each PA to separate applicants by application year(s) and budget category. These strata ensure representation within the sample of different application types and applicant experiences. Targeting these sub-populations allows for program-wide results to be reported at the application year and budget category levels, respectively, with a higher degree of accuracy. Applicants are grouped by application year based on whether they submitted applications only in 2021, only in 2022 or in both 2021 and 2022. An applicant’s budget category, for purposes of stratification, is defined as the budget category for which most applications were submitted by that applicant across both 2021 and 2022. Budget categories provide a useful separation of applications by size, sector, technology, and eligibility requirements. Each budget sub-category can trigger differences in application requirements, forms, stages, and payment structures.

Strata quotas were derived by distributing each PA’s target sample across the identified strata proportional to applicant population. Applicants who submitted applications in both 2022 and 2021 are counted towards both year’s sample quota. Additionally, strata quotas were increased to account for the

prolific applicant census and to target a minimum of three sample points (or a census if the total population was fewer than three). The total number of completed applicant surveys by PA and budget category are provided in Table 3-3 below. Tables with the distribution of completes by strata for each PA are provided in Appendix B.1. Strata quotas were developed as a guide to completing the necessary sample, not as hard targets. In several cases some quotas were not able to be met due to applicant non-responsiveness to multiple survey invitations.

For any 1-5 scalar questions reported as an average by PA throughout this report, the reported score is weighted by the applicant population distribution. All other applicant responses are unweighted.

TABLE 3-3: APPLICANT SURVEY STRATA QUOTA ACROSS ALL PAS

Budget Category	Application Year	Applicant Population	% of Applicant Population	n Completes	Achieved Sample Distribution
Small Residential Storage	PY 2021 Only	62	14.3%	12	15.2%
	PY 2022 Only	41	9.4%	13	16.5%
	PY 2021 / PY 2022	110	25.3%	24	30.4%
Large-Scale Storage	PY 2021 Only	24	5.5%	4	5.1%
	PY 2022 Only	41	9.4%	2	2.5%
	PY 2021 / PY 2022	24	5.5%	3	3.8%
Equity Resiliency	PY 2021	36	8.3%	3	3.8%
	PY 2022	33	7.6%	7	8.9%
	PY 2021 / PY 2022	49	11.3%	8	10.1%
Generation	All	10	2.3%	1	1.3%
Non-Residential Storage Equity		2	0.5%	1	1.3%
Residential Storage Equity		2	0.5%	1	1.3%
San Joaquin Valley Residential		1	0.2%	0	0.0%

It should be noted that while strata quotas targeting each year were developed for the 2021 and 2022 PA evaluation, applicant surveying efforts focused on the most recent year of participation to limit recall bias resulting from the length of time since SGIP participation and surveying¹⁸. As a result, substantially more applicants were asked about their SGIP participation in 2022 (versus 2021) due to the number of applicants who participated in both program years (and therefore applicant survey findings for both the 2021 and 2022 program years are presented together). As discussed above, the PAs reported no substantial program changes between 2021 and 2022, so this grouping is unlikely to mask any differences

¹⁸ Surveying efforts began in June of 2023.

in applicant experiences with the program between the two program years.

3.3 HOST CUSTOMER SURVEY

SGIP host customers were surveyed via web surveys and topics included their experience and satisfaction with the application process, PA communications, and program websites. New questions were asked in 2023 related to claiming the Federal Investment Tax Credit. Most survey questions are quantitative scalar questions, with follow-up open-ended questions as needed. An email survey invitation including a web link and a letter from the CPUC (explaining the purpose of the survey) were sent to approximately 20,000 host customers. Email survey reminders were sent to those who had not responded to achieve the desired number of responses. Appendix A.3 presents the host customer survey instrument.

3.3.1 Sample Design

Like the applicant survey, the sample design for the host customer survey was designed so results can be reported with high confidence for each individual PA. Based on the observed COV from the PY 2020 PA Performance Evaluation, sample sizes were estimated for each PA to enable reporting of 1-5 scalar satisfaction questions at 90/10. For sampling purposes, host customers were aggregated based on customer name, contact information, and location. Table 3-4 summarizes the target host customer samples and number of completes for each PA and program year.

TABLE 3-4: TARGET HOST CUSTOMER SAMPLE SIZE BY PROGRAM YEAR AND PROGRAM ADMINISTRATOR

Program Year	PA	Host Customer Population	Host Customer 90/10 Target Sample	n Completes	Achieved RP ¹⁹
2021	PG&E	5,676	63	470	2.7%
	SCE	3,048	62	274	3.7%
	SCG	1,112	60	113	4.2%
	CSE	1,949	61	223	3.4%
	Total	11,634	--	1,080	--
2022	PG&E	2,773	62	267	4.2%
	SCE	4,225	62	370	3.2%
	SCG	533	57	37	7.3%
	CSE	1,077	60	129	5.2%
	Total	8,489	--	803	--

¹⁹ Achieved relative precision was calculated from results of the host customer survey question: How satisfied are you with your experience with [PAs] in relation to the SGIP (in 2021 or 2022)?

The host customer sample targets were exceeded by a large margin for all PAs. Response frequency tables for each closed-ended question in the host customer survey are included in Appendix E.

Strata Quota

Further strata were developed within each PA to separate host customers by budget category and applicant prolific status. These strata ensure representation within the sample of different application types and host customers with applicants with various amounts of experience. Targeting these sub-populations enables program-wide results to be reported at the budget category and applicant prolificity levels, respectively, with a higher degree of accuracy.

For sampling purposes, each host customer was assigned to a single budget category based on the category with the highest application count for a given host customer. Budget categories provide a useful separation of applications by size, sector, and technology. Each budget sub-category can trigger differences in application requirements, forms, stages, and payment structures. Host customers were also categorized by their applicant's prolific status (prolific applicants are those who have submitted 100 or more applications). The host customer's experience with the SGIP can depend on their applicant's familiarity with the program.

To derive strata quotas, each PA's target host customer sample was distributed across the identified strata proportional to the host customer population. Strata quotas were then increased to a minimum of eight sample points or to a census of the total population of host customers if a given stratum contained fewer than eight host customers²⁰. Unlike the applicant strata quota, strata quotas were developed for 2021 and 2022 separately, as most host customers have only submitted a single application in a program year. Strata quotas were developed as a guide to completing the necessary sample; they were not developed as hard targets.

The 2021 and 2022 strata quota across all PAs are shown below in Table 3-5. More detailed tables showing the strata quota, the number of completed surveys, and the distribution of completes by PA, applicant prolific status, budget category and program year are provided in Appendix B.2. Responses to all 5-point scalar questions reported by PA throughout this report are weighted by the host customer population distribution. All other reported host customer responses are unweighted.

²⁰ The minimum of 8 responses in each category is meant to ensure that surveying efforts gather responses from all categories. The minimum number of host customers is greater than the minimum number of applicants due to the greater relative number of host customers available in the population sample.

TABLE 3-5: HOST CUSTOMER POPULATION AND SURVEY COMPLETES BY PROGRAM YEAR

Program Year	Budget Category	Host Customer Population	% of Host Customer Population	n Completes	Achieved Sample Distribution
2021	Small Residential Storage	7,565	64.1%	668	61.9%
	Large-Scale Storage	727	6.2%	57	5.3%
	Residential Storage Equity	83	0.7%	9	0.8%
	Non-Residential Storage Equity	30	0.3%	0	0.0%
	Equity Resiliency	3,196	27.1%	344	31.9%
	San Joaquin Valley Residential	180	1.5%	2	0.2%
	Generation*	13	0.1%	0	0.0%
	Total	11,794	100%	1,080	100%
2022	Small Residential Storage	6,183	71.8%	539	67.1%
	Large-Scale Storage	748	8.7%	63	7.8%
	Residential Storage Equity	26	0.3%	2	0.2%
	Non-Residential Storage Equity	17	0.2%	1	0.1%
	Equity Resiliency	1,617	18.8%	197	24.5%
	San Joaquin Valley Residential	14	0.2%	1	0.1%
	Generation	3	0.0%	0	0.0%
	Total	8,608	100%	803	100%

*Includes Generation applications Submitted Prior to 2021

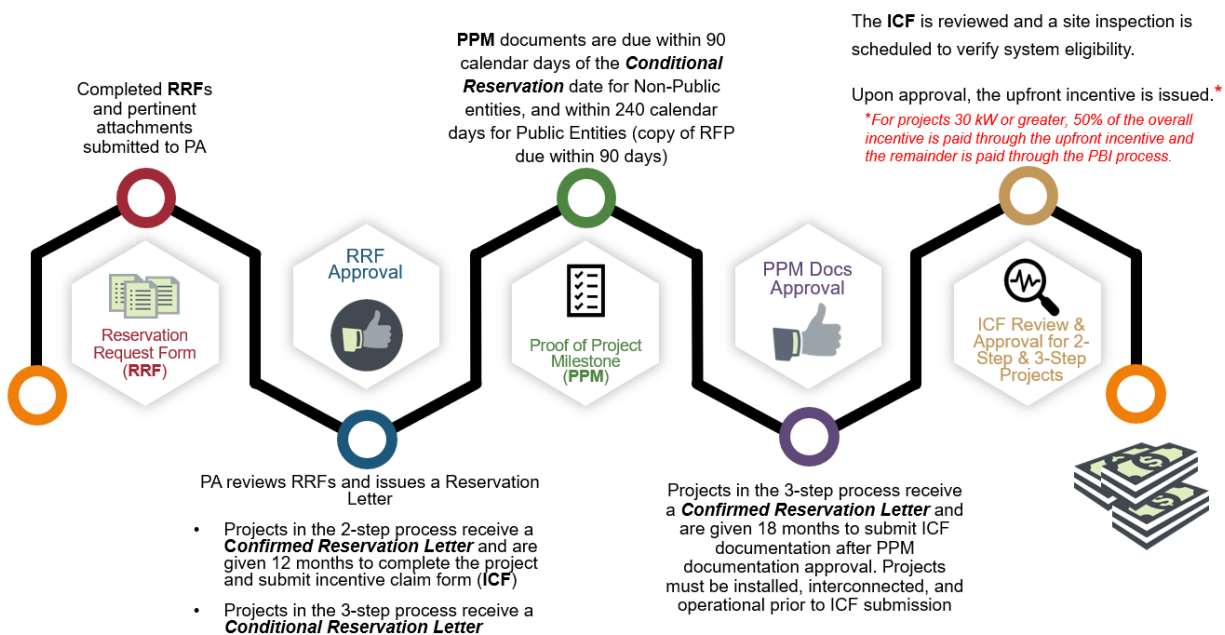
4 EVALUATION RESULTS

In this section we present findings resulting from the primary data collection activities completed as part of the 2021 and 2022 PA evaluation (PA interviews, and applicant and host customer web surveys). This section is organized thematically by the primary topical areas explored surrounding program changes, participant experience, and satisfaction with the program.

4.1 OVERVIEW OF PARTICIPANT EXPERIENCE

An SGIP project application requires a variety of technical information to help establish the specifics of the technology to be incentivized, its location, host customer eligibility, and its anticipated or demonstrated performance in line with the goals of the SGIP program. Applicants submit this information through the online application portal via a series of required program documents that vary depending on the size of the equipment and whether it qualifies for performance-based incentives (PBI) payments. Figure 4-1 below provides an overview of the current SGIP application process.

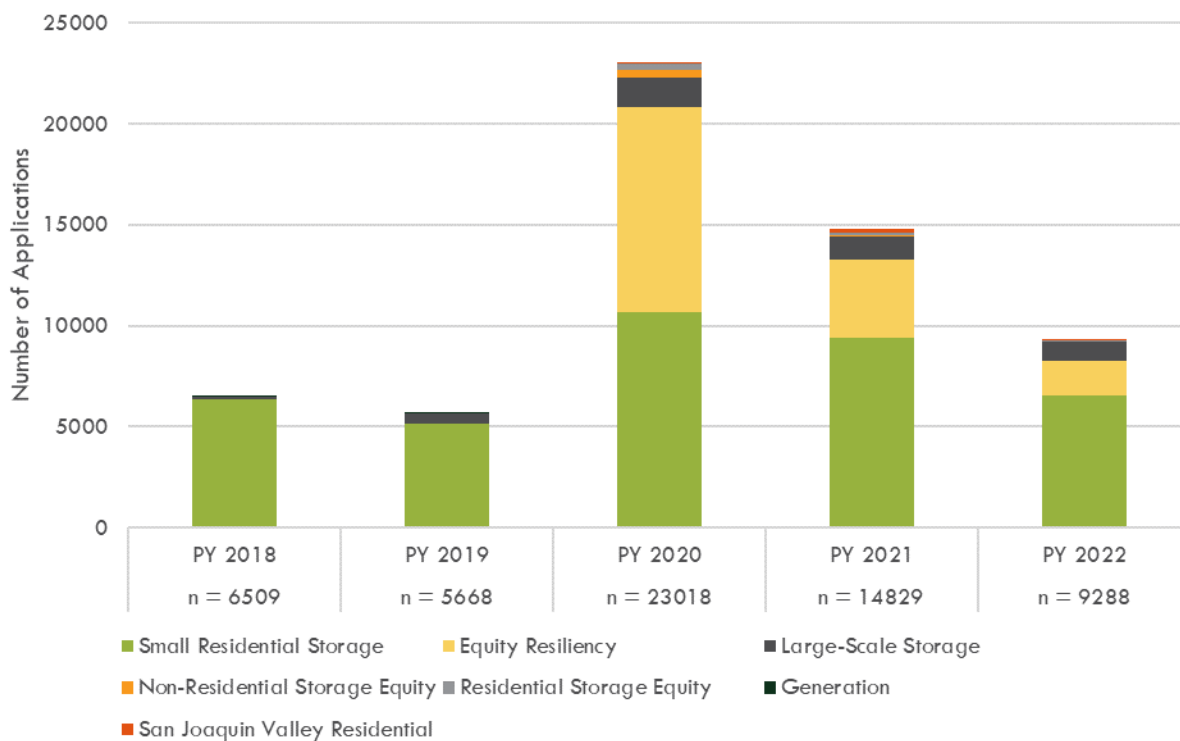
FIGURE 4-1: SGIP APPLICATION PROCESS



Over the last two years SGIP projects continued to be primarily battery storage (as opposed to generation). And while the share of Equity Resiliency budget category projects continues to be significant, their share has declined since this budget category was launched in 2020 (Table 4-6). The volume of

new applications dropped significantly in both 2021 and 2022 to a level where the total volume of applications in 2022 was roughly 40% of what it had been in 2020. Since 2020, several PAs have reorganized their approach to staffing the program and increased offerings such as Office Hours to better serve applicants and host customers.

FIGURE 4-2: ANNUAL APPLICATION VOLUME BY BUDGET CATEGORY, 2018-2022



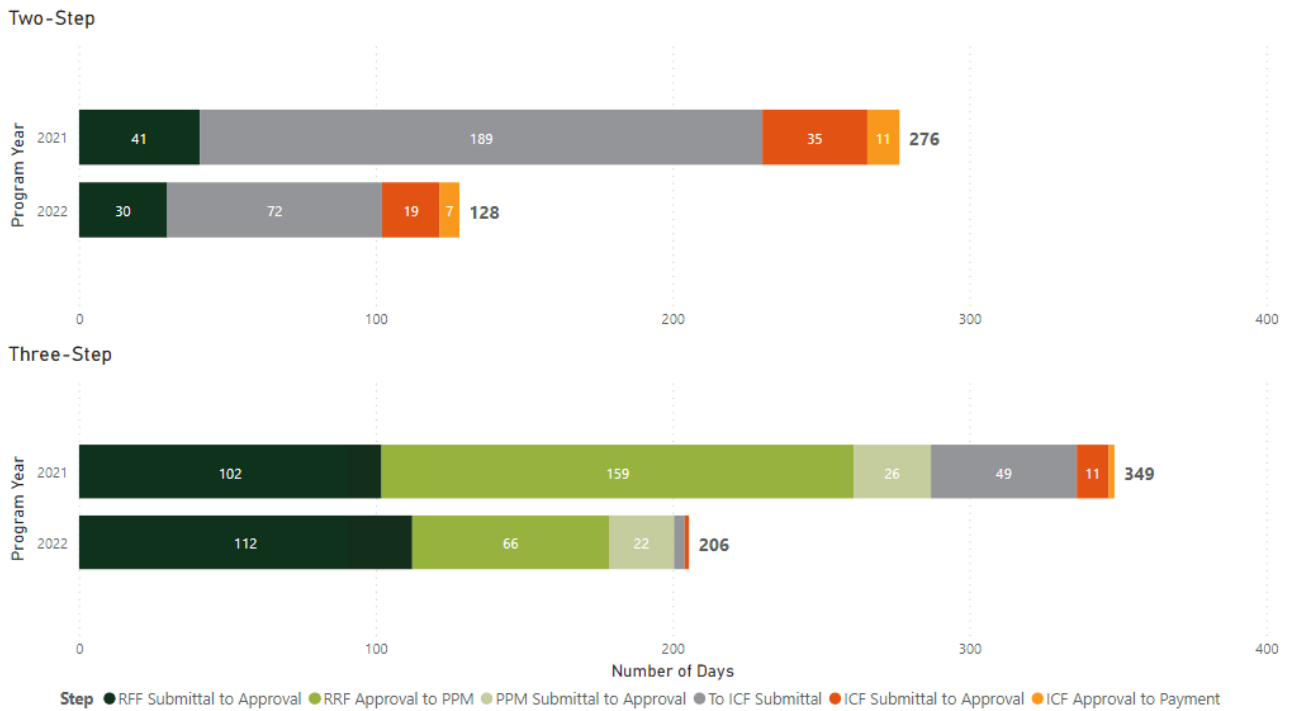
The number of program applicants that submitted applications (by organization/firm) increased significantly in 2020 compared to prior years (increasing to 531 in 2020 from 209 in 2019), however the number of applicants has declined since then (with 2021 having 321 distinct applicants and 2022 having 324 distinct applicants). This is likely due to the budget categories being fully or near fully subscribed, especially the Equity Resiliency budget category after its initial opening in 2020.

4.1.1 Participation Timeline

The SGIP program tracking data contains the dates for when each application has reached or completed a step in the SGIP application process. As a result, the evaluation team calculated the time (in days) it takes an average application to move through the SGIP from initial application to payment of the full incentive. Figure 4-3, below, presents the average time (in days) spent in each step of the two-step and three-step application process for PY 2021 and PY 2022 applications. In general, the average PY 2021

application spent 276 days moving through the two-step application process compared to 128 days in PY 2022. Similarly, the average PY 2021 three-step application spent 349 days moving through the application process compared to 206 days for PY 2022 applications.

FIGURE 4-3: TWO-STEP AND THREE-STEP PROCESS AVERAGE TIME (IN DAYS) SPENT WITHIN EACH STEP BY PROGRAM YEAR



As clearly seen, streamlining efforts by the PAs and the lower volume of applications in PY 2022 greatly reduced the amount of time each project spent in each step of the program. The greatest reduction in time between PY 2021 and PY 2022 results from a significant time reduction in the “To ICF Submittal” and “RRF Approval to PPM” phase of the application process. However, all phases of the two-step application process saw a reduction in the number of days the average application spent in each step. For three-step applications, all phases saw a reduction in the number of days the average application spent in each step except for “RRF Submittal to Approval”.

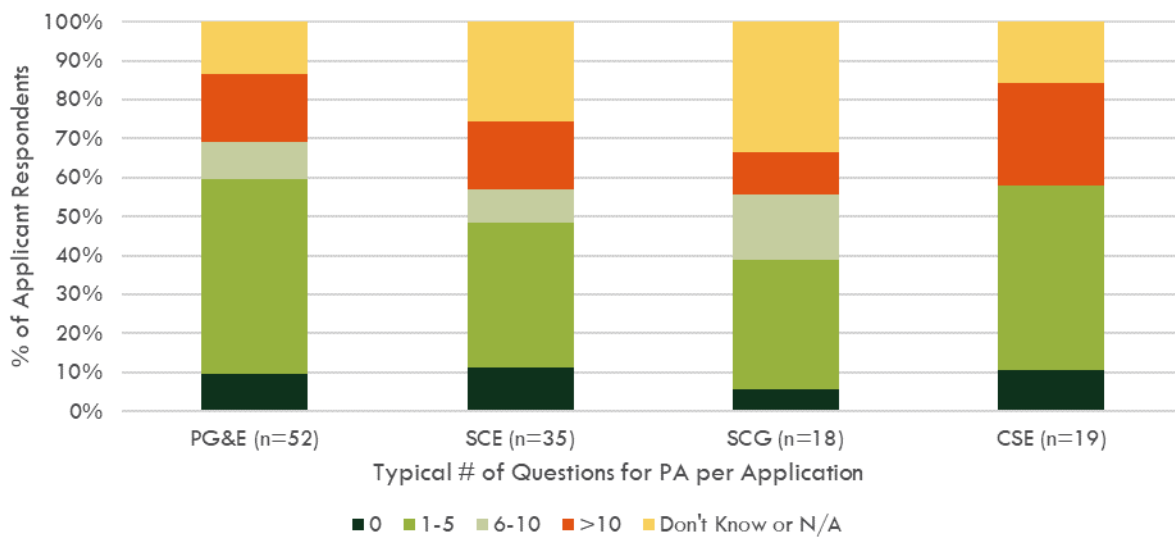
4.1.2 Program and Communication Clarity

PAs can influence participants’ experience of the program through the clarity of their communications. This is a main way in which SGIP applicants and host customers learn of details associated with their application, relevant deadlines pertaining to program milestones, and changes being made to program

incentives or eligibility requirements. In 2021 and 2022, applicants reported receiving program updates from a variety of sources, notably through application portal notifications (51%), website updates (46%), the SGIP handbook (43%), and email (41%).²¹ Nearly all host customers reported receiving program updates by email (80%).

To gauge the effectiveness of PA communications, applicants were asked a series of questions focused on the frequency and content of their communications with the PA. As shown in Figure 4-4, one-third to one-half of applicants reported asking their PA 1-5 clarifying questions per application, and more than one-quarter asked 6-10 or > 10. This is a large increase from 2020 when few applicants asked more than 5 questions.

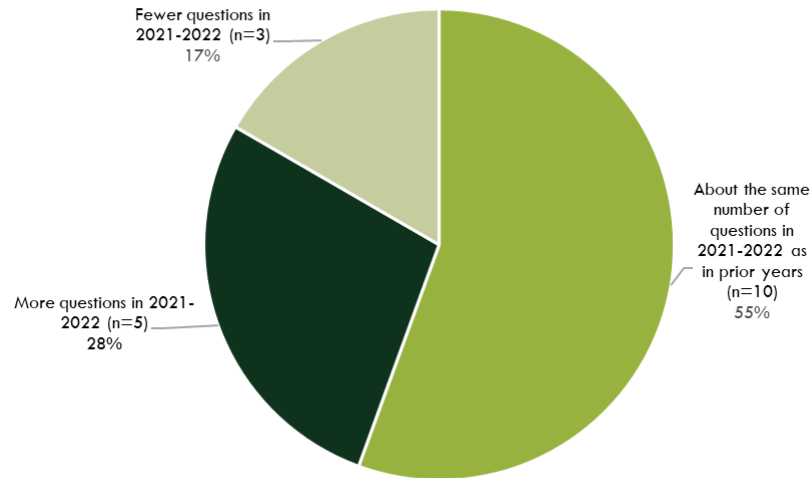
FIGURE 4-4: APPLICANT'S TYPICAL NUMBER OF CLARIFYING QUESTIONS FOR THE PROGRAM ADMINISTRATOR



Significantly more SGIP applicants who responded to the survey in 2021 and 2022 had participated in the SGIP in prior years (56% versus 35% in 2020). These experienced applicants were asked whether the number of clarifying questions in their most recent year of participation had changed from previous years. As shown in Figure 4-5, most experienced respondents stated that in 2021 or 2022 they had fewer or similar numbers of questions (17% and 55%, respectively) than they had in prior years. This is down from 2020 when 55% reported having more questions. This is to be expected as the new equity resiliency budget category was introduced in 2020 and was a source of many questions that year.

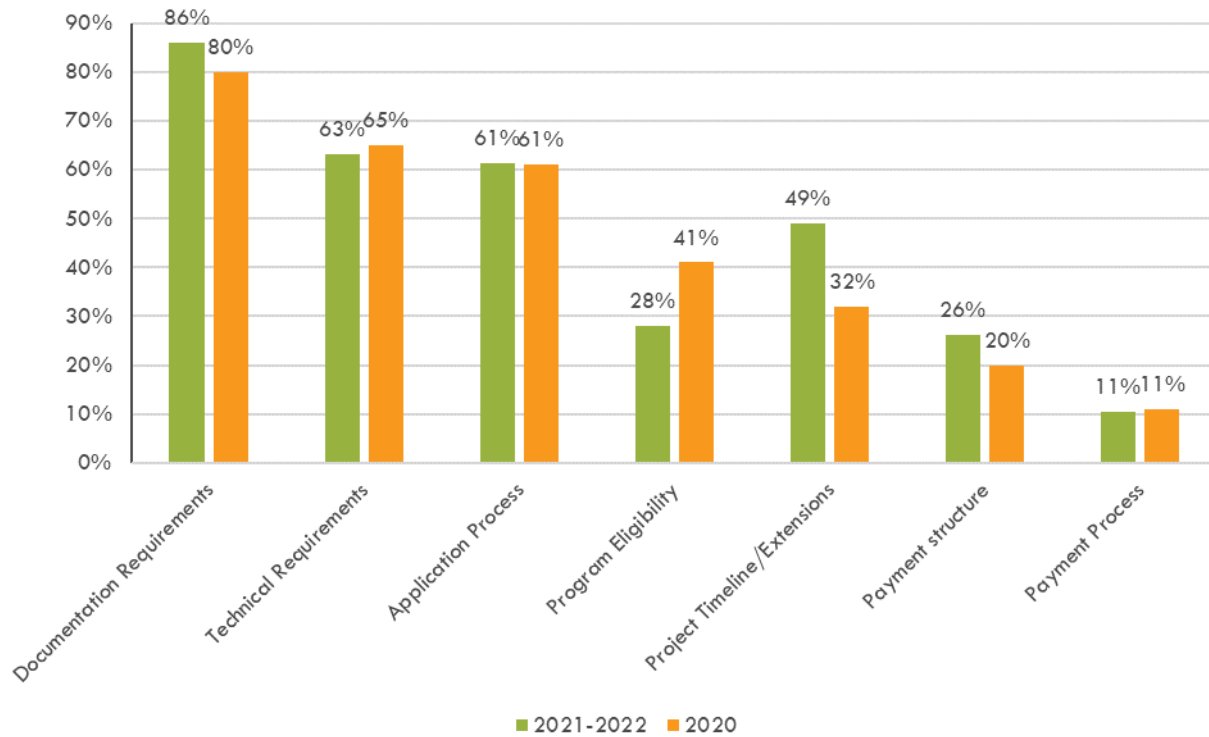
²¹ Applicants also noted receiving program updates from quarterly workshops (30%), webinars (18%), other organizations (13%), and mail notifications (12%).

FIGURE 4-5: COMPARISON OF CLARIFYING QUESTIONS IN 2021 OR 2022 TO PREVIOUS YEARS



Applicants were also asked about the types of questions they had for the PAs in 2021 and 2022 (Figure 4-6). Similar to prior years, in 2021 and 2022 the majority of questions concerned the documentation requirements (86%), the technical requirements (63%), or the application process (61%). The proportion of survey respondents reporting having program eligibility questions decreased by one-third since 2020. This is likely due to applicant’s increased familiarity with the new budget categories launched in 2020, as well as fewer changes to eligibility requirements for equity-based budget categories. The proportion of applicants that reported having questions about project timelines and extensions increased by more than 50% since 2020. Based on findings from the SGIP 2021 Energy Storage Market Assessments, there have been significant shortages of battery storage devices in 2021 and 2022 resulting in backorders for battery systems and delayed installations. This is likely a contributor to the increase in questions related to project timelines and extensions.

FIGURE 4-6: TYPES OF QUESTIONS APPLICANTS ASKED PROGRAM ADMINISTRATORS



A host customer’s experience with the program is primarily mediated through their applicant as the applicant typically assembles and submits the project application, while the host customer ultimately benefits from the incentivized SGIP technology. For these reasons, it is still important to understand the clarity of their host customers’ experience with the program, even though they may not directly interact with the PAs. To gauge this, host customers were asked to rate (on a 1 to 5 scale) the clarity of the program eligibility and project documentation requirements, the program timelines, their application status, and the division of responsibility with their applicant. Table 4-1 shows the weighted-average and relative precision (at 90% confidence) of the clarity ratings reported by host customers in each of the PA territories. This table also includes the number of respondents providing a clarity rating for each question, the percentage of respondents that gave the highest rating (5) and lowest rating (1), and the average rating provided for the 2021-2022 program period, as well as for each year individually.

In nearly every category across all PAs, the average clarity ratings reported for the 2021-2022 program period declined from 2020. The largest observed declines were related to the clarity of program requirements (eligibility and documentation) and the division of responsibility with their PA, although declines in the clarity of program timelines and application status also occurred, (except for PG&E application status which was lower than the other PAs in 2020 and has since improved to be more in line with the other PAs).

TABLE 4-1: HOST CUSTOMER CLARITY WITH PROGRAM ASPECTS

Program Aspect		Average Rating 2021-2022	Rel. Prec. 90% Conf	# of Respondents	% Rating 5	% Rating 1	Average Rating 2020
PG&E	Eligibility requirements	3.2	2.3%	659	21%	17%	3.5
	Documentation requirements	3.1	2.3%	632	18%	20%	3.4
	Program timelines	2.8	2.4%	661	13%	25%	2.8
	Application status	3.2	2.2%	674	20%	19%	2.9
	Division of responsibility	3.1	2.5%	647	25%	25%	3.8
SCE	Eligibility requirements	3.5	2.0%	598	29%	12%	3.8
	Documentation requirements	3.3	2.2%	570	26%	14%	3.3
	Program timelines	3.0	2.5%	583	20%	22%	3.1
	Application status	3.3	2.2%	603	26%	17%	3.3
	Division of responsibility	3.3	2.5%	577	28%	20%	3.9
SCG	Eligibility requirements	3.9	3.5%	128	37%	5%	4.1
	Documentation requirements	3.7	3.7%	128	32%	6%	3.9
	Program timelines	3.3	4.7%	129	22%	11%	3.4
	Application status	3.6	4.0%	134	31%	7%	3.8
	Division of responsibility	3.3	4.8%	132	29%	15%	3.9
CSE	Eligibility requirements	3.7	2.4%	329	36%	11%	4.1
	Documentation requirements	3.5	2.9%	312	31%	13%	3.9
	Program timelines	3.0	3.5%	323	21%	24%	3.3
	Application status	3.3	2.9%	334	24%	15%	3.5
	Division of responsibility	3.4	3.1%	327	33%	18%	3.8

*Average 2022 and 2021 ratings represent average ratings from host customers who applied to the SGIP in 2022 and 2021 respectively

Host customers who indicated that a program aspect was not clear (indicated by rating of 1 or 2) were asked why they felt that aspect was not clear. Common reasons for the lack of host customer clarity are presented in Table 4-2 below.

TABLE 4-2: COMMON REASONS FOR LACK OF HOST CUSTOMER CLARITY BY PROGRAM ASPECT (RATING 1 OR 2)

Program Aspect	# and % of Host Customers Rating 1 or 2	Reason for Lack of Clarity	Number of Host Customers
Eligibility requirements	385 (21%)	The resiliency eligibility requirements were unclear	142
		The equity eligibility requirements were unclear	131
Documentation requirements	479 (26%)	It was unclear what information was needed	244
		The documentation requirements kept changing based on correspondence with the PA.	137
Program timelines	645 (35%)	There were long lapses in communication from the PA	354
		The host customer was not informed of a timeline to receive incentive	284
		There were long lapses in communication from the applicant	265
		The timeline to receive incentive kept changing	173
Application status	486 (26%)	There were long periods of time with no update on the status of the application	331
		Host Customer did not know when to expect the application to move onto the next step	288
		Host Customer did not know what was preventing the application to move onto the next step	236
Division of responsibility	556 (30%)	Host Customer did not know who was supposed to respond to certain communications from SGIP administrators	370
		Host Customer thought the applicant would handle MORE SGIP responsibilities	190

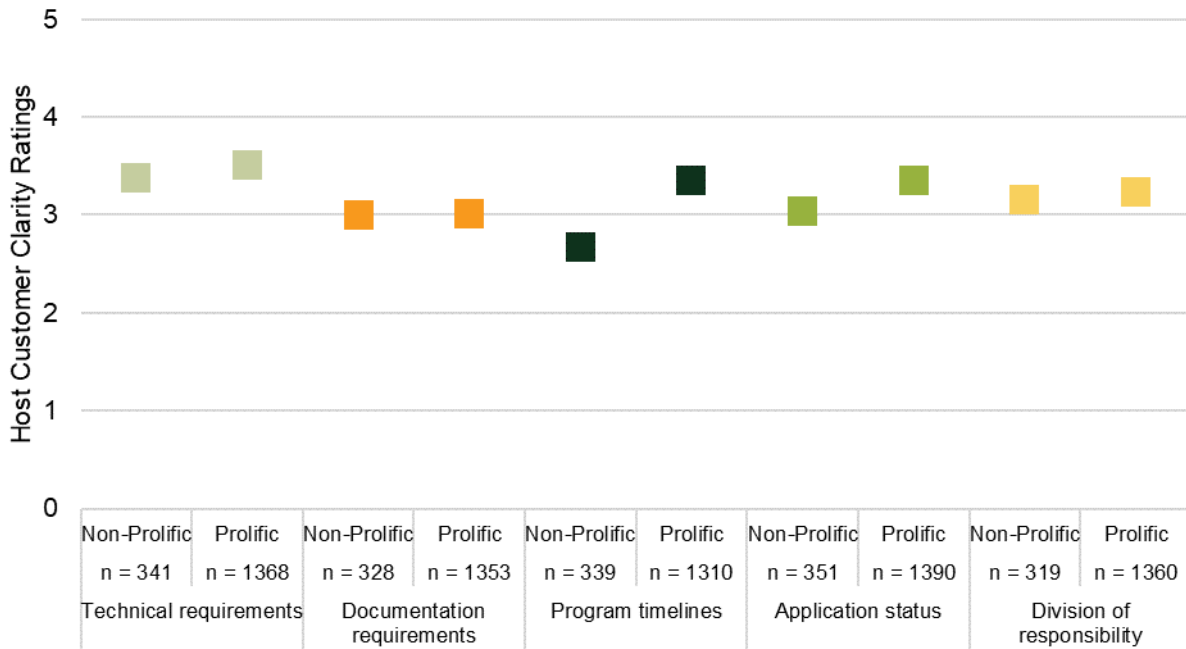
Some examples of specific eligibility requirements that were not clear to host customers included confusion surrounding the requirements for being on an SGIP approved rate and what the requirements were for a medical baseline. Additionally, several host customers stated that the eligibility requirements changed during the application process, and they did not understand why these changes were made. While the PAs are not directly responsible for educating every host customer, it may behoove the PAs to stress the importance for developers and applicants to educate host customers on the SGIP and explain what is to be expected throughout the process. In support of this, several host customers stated that aspects of the SGIP were unclear (especially the division of responsibility) because their developer, applicants and/or installers did not communicate well with them. For these customers, their clarity regarding the SGIP would have greatly improved if their communication with these non-PA entities improved.

Experience by Applicant Prolific Status and Technology Group

Figure 4-7, Figure 4-8, and Figure 4-9 present the levels of clarity among 2021-2022 host customers by

their applicant’s prolific status and by budget group.²² As these figures show, the level of clarity reported by host customers who had a prolific applicant was slightly higher for all program aspects. These findings continue to be consistent with previous evaluations and likely imply that prolific applicants who are more experienced with SGIP are better able to clearly communicate various program aspects to host customers.

FIGURE 4-7: HOST CUSTOMER CLARITY WITH PROGRAM ASPECTS BY THEIR APPLICANT’S PROLIFIC STATUS



The results by budget group²³ show that program clarity across all aspects was always lower for the large storage budget category. It should be noted that in 2021 and 2022 the equity resiliency and small residential budget categories continued to receive the majority of SGIP applications and thus the PAs and applicants have the most familiarity with these projects. Additionally, the application process for large-scale storage can have more steps than the equity resiliency and small residential storage budget categories, which presents additional opportunities for confusion.

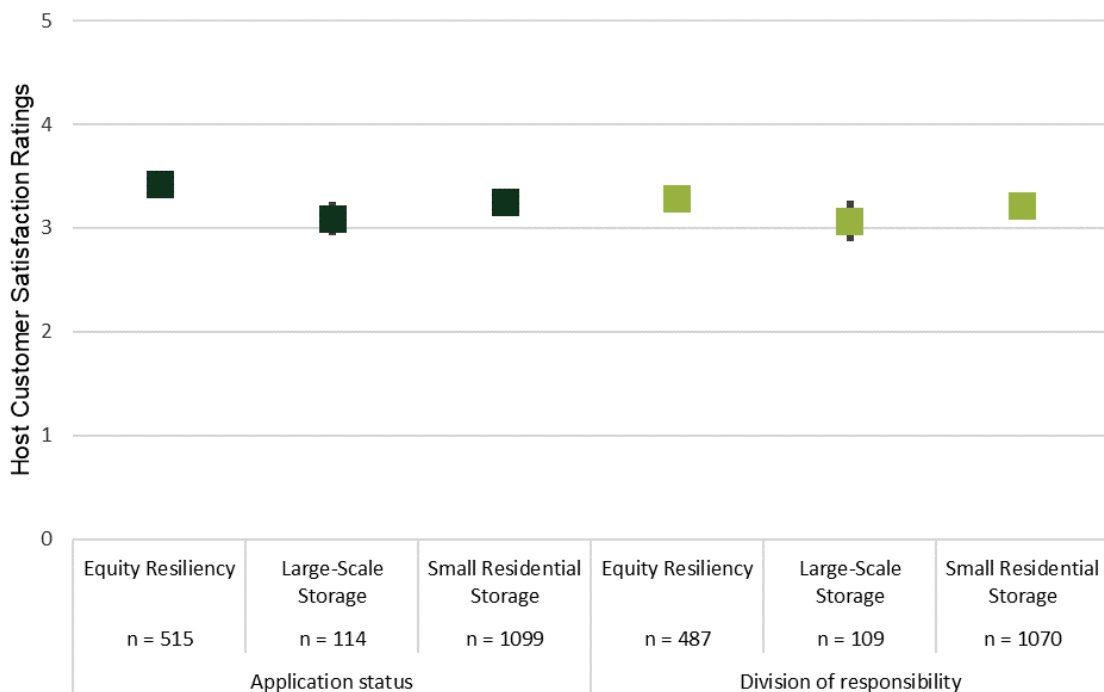
²² Due to small sample sizes, generation and residential equity host customers were excluded from budget group breakouts.

²³ This comparison only includes the equity resiliency, large storage, and small residential budget categories as the number of host customer respondents in the other budget categories were very small (n <= 10).

FIGURE 4-8: HOST CUSTOMER CLARITY WITH PROGRAM ASPECTS BY BUDGET GROUP, 2021-2022 – PART 1



FIGURE 4-9: HOST CUSTOMER CLARITY WITH PROGRAM ASPECTS BY BUDGET GROUP, 2021-2022 – PART 2



Host Customer Satisfaction with Program Administrator Communication

Host customer communications with the PAs and the applicants can affect their understanding of their SGIP application status and what is needed to move their project forward. Host customers were asked to rate on a scale of 1 to 5 their satisfaction with the information provided in communications they received from the PAs and the program information provided to them by the applicants. As seen in Table 4-3, host customers were slightly more satisfied with the information provided by their Applicant than their PA. Host customers satisfaction with SGIP communications from both their PA and Applicant remained fairly consistent since 2020.

TABLE 4-3: HOST CUSTOMER SATISFACTION WITH PROGRAM COMMUNICATIONS REGARDING THE SGIP

Program Aspect		Average Rating 2021-2022	Rel Prec 90% Conf	# of Respondents	% Rating 5	% Rating 1	Average Rating 2020
PG&E	Communications from PA	3.1	2.2%	570	15%	15%	3.0
	Communications from Applicant	3.5	2.0%	680	34%	15%	3.5
SCE	Communications from PA	3.3	2.2%	549	23%	13%	3.4
	Communications from Applicant	3.4	3.0%	277	22%	13%	3.6
SCG	Communications from PA	3.6	3.4%	113	22%	4%	3.7
	Communications from Applicant	3.6	4.1%	128	32%	12%	3.8
CSE	Communications from PA	3.4	3.0%	277	22%	13%	3.6
	Communications from Applicant	3.6	2.7%	337	36%	12%	3.8

Host customers that were not satisfied with the communication provided by either their PA or their applicant were asked the reasons for their dissatisfaction. Table 4-4, below provides the most common reasons for communication dissatisfaction with the PA and Applicant.

TABLE 4-4: REASONS FOR HOST CUSTOMER DISSATISFACTION WITH PA AND APPLICANT COMMUNICATION

Program Aspect	# and % of Host Customers Rating 1 or 2	Reason for Communication Dissatisfaction	Number of Host Customers
Communications from PA regarding SGIP	402 (25%)	The PA did not provide enough information in their communications.	206
		The communication received by the PA was too infrequent.	181
		The information provided by the PA was not clear.	179
		The host customer did not know what to do upon receiving certain information.	153
Communications from applicant regarding SGIP	439 (24%)	The applicant did not provide enough information in their communications.	245
		There were communication issues due to Applicant’s organizational structure.	172
		Applicant poorly explained the role of the SGIP incentive in the host customer’s contract with the applicant company.	171
		The applicant was not well informed about the SGIP process.	158
		The applicant poorly explained the SGIP system operation requirements prior to participation in SGIP.	147

Experience by Applicant Prolific Status and Budget Group

Figure 4-10 and Figure 4-11 present the host customers’ satisfaction with the information provided by the PA and applicants segmented by their applicant’s prolific status and budget group, respectively. As a comparison, it also shows the variation in overall SGIP program satisfaction reported by host customers falling into these two groups. As seen previously, satisfaction with communication and the overall experience follows roughly the same trend as host customer clarity in Figure 4-7 through Figure 4-9, where non-prolific and large-scale storage applicants report less satisfaction. This is not surprising given that the common causes for communication dissatisfaction resulted due to perceptions of poor clarity and insightfulness of the communication provided by both applicants and PAs.

FIGURE 4-10: HOST CUSTOMER SATISFACTION WITH PA AND APPLICANT INFORMATION BY PROLIFIC STATUS

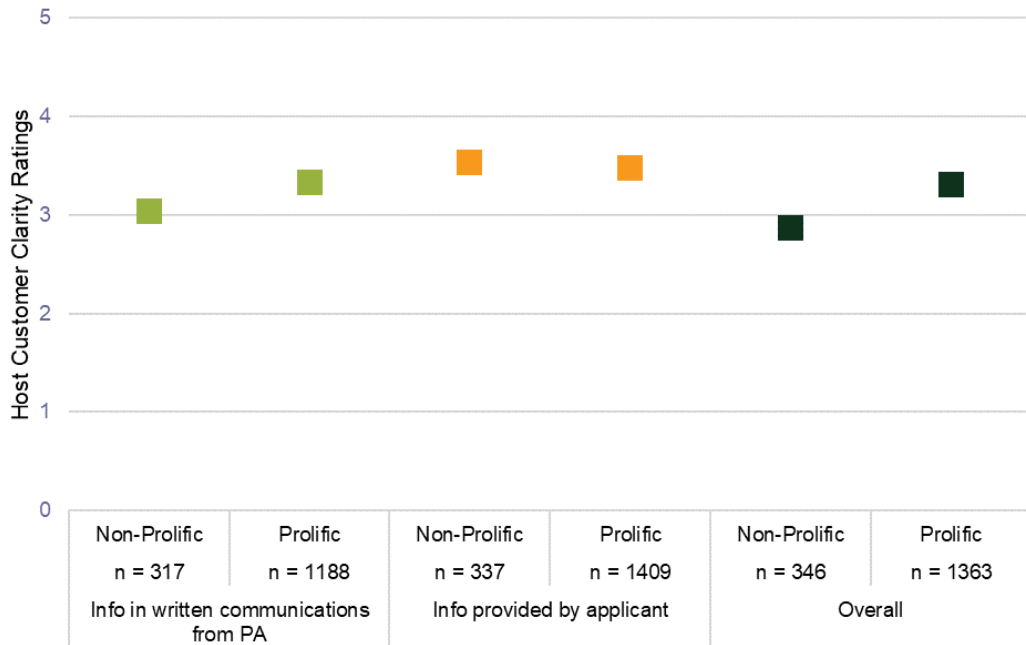
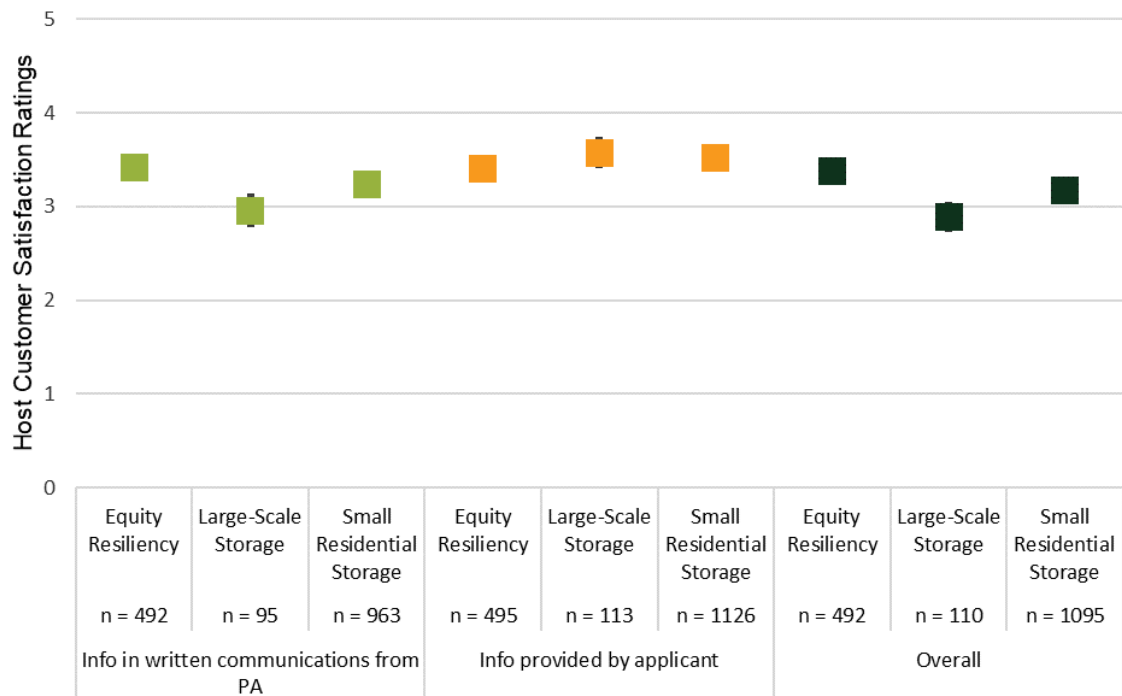


FIGURE 4-11: HOST CUSTOMER SATISFACTION WITH INFORMATION PROVIDED BY THE PA AND APPLICANT BY BUDGET GROUP



Host Customer Understanding of Requirement for Approved TOU Rate

Starting in April of 2020, new residential storage projects were required to switch to a SGIP-approved electricity rates. Host Customer participants who had installed a residential storage project in 2021 or 2022 were asked about their awareness of this rate requirement and more than half (56%) reported they were (up from 47% in 2020). Of those who were aware of this requirement, 58% reported they were informed by their applicant and 55% were informed by their PA.

Host Customers were asked to rate their level of understanding of how the rate requirement would impact their utility bill (on a scale from 1 to 5, where 1 is a poor understanding and 5 is an excellent understanding). As seen in below Table 4-5, most host customers (74%) reported having a moderate to excellent understating of how the new rate would impact their utility bill (rating of 3 or above). The average host customers rating in 2021/2022 was 3.3 out of 5 (the same as in 2020).

TABLE 4-5: HOST CUSTOMER RATING OF THEIR UNDERSTANDING OF THE IMPACT OF THE TOU RATE REQUIREMENT ON UTILITY BILLS

PA	Average Rating 2021-2022	# of Respondents	% Rating 3 or above	% Rating 1 or 2	Average Rating 2020
PG&E	3.2	395	72%	28%	3.1
SCE	3.4	435	76%	24%	3.2
SCG	3.4	67	79%	21%	3.6
CSE	3.3	140	73%	27%	3.4
Total	3.3	1,037	74%	26%	3.3

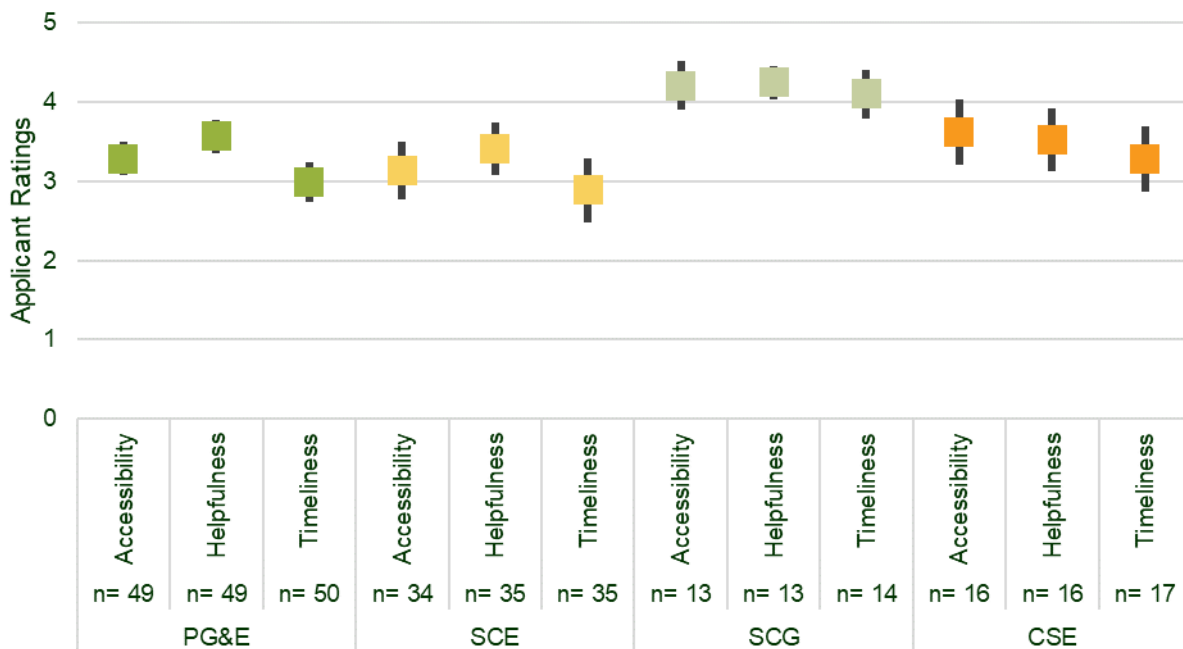
4.1.3 Interactions with Program Administrators

Over the course of SGIP participation, applicants and host customers interact with PAs for a variety of reasons, including submitting documents, asking clarifying questions, and resolving application issues. As a result, the interactions that the participants have with PAs can have a significant effect on their overall outlook on SGIP and program satisfaction. This section explores applicant and host customer satisfaction with their PA interactions in terms of timeliness, helpfulness, and accessibility. These interactions are key to program participants’ overall program experience.

Overall Satisfaction with Timeliness, Helpfulness and Accessibility of Program Administrators

Applicants were asked to rate their experience with PA timeliness, helpfulness, and accessibility (Figure 4-12 below). Applicant satisfaction across all types of interactions was moderate for all PA’s except SCG which had average satisfaction ratings above 4 in all categories. PG&E satisfaction had increased significantly since 2020 when applicants’ ratings ranged from 1.8 to 2.5.²⁴ It is interesting to note that across all PA’s the area with the lowest applicant satisfaction rating was timeliness. More discussion on the rationale for dissatisfaction in each of these areas and how these satisfaction levels compare to prior program years is provided separately for each category in the section that follows.

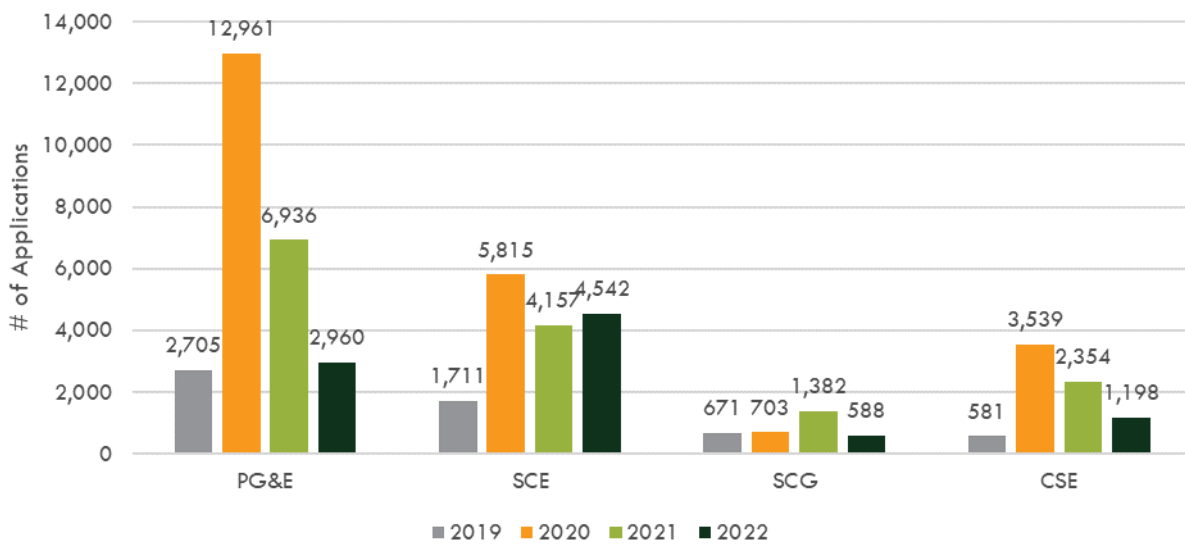
FIGURE 4-12: APPLICANT SATISFACTION WITH ACCESSIBILITY, HELPFULNESS, AND TIMELINESS BY PA



²⁴ In 2019, prior to PG&E’s 2020 significant increase in applications (shown in Figure 4-13 below), satisfaction was at or just below 2.0 in all categories. This indicates the observed increase in applicant satisfaction is related to more than just a decline in application volume.

When comparing applicant’s satisfaction with the PA’s accessibility, helpfulness, and timeliness between 2020 to 2021/2022 it is important to note the significant increase in application volume that took place in 2020 (PG&E, SCE and CSE all experienced between 3x and 6x increases in applications in 2020) followed by application declines in over the following two years SCG had the smallest application counts in each year (due to service territory and budget allocation). However, it experienced a roughly 2x increase in application volume between 2020 and 2021. Application volume from 2019 – 2022 by PA is displayed below in Figure 4-13.

FIGURE 4-13: SGIP APPLICATIONS BY PROGRAM ADMINISTRATOR, 2019 - 2022



Applicants who participated in the SGIP in 2021 and/or 2022 and prior program years were asked whether their satisfaction with the PAs’ timeliness, helpfulness, and accessibility had changed in 2021/2022 compared to prior program years. Table 4-6 below shows the distribution of responses from the applicant respondents who had participated in 2021/2022 and a prior program year. As this table shows, the vast majority of applicants reported no change in their satisfaction level in 2021/2022 compared to program years. However, those reporting a change more often reported being more satisfied in 2021/2022 than in past years.

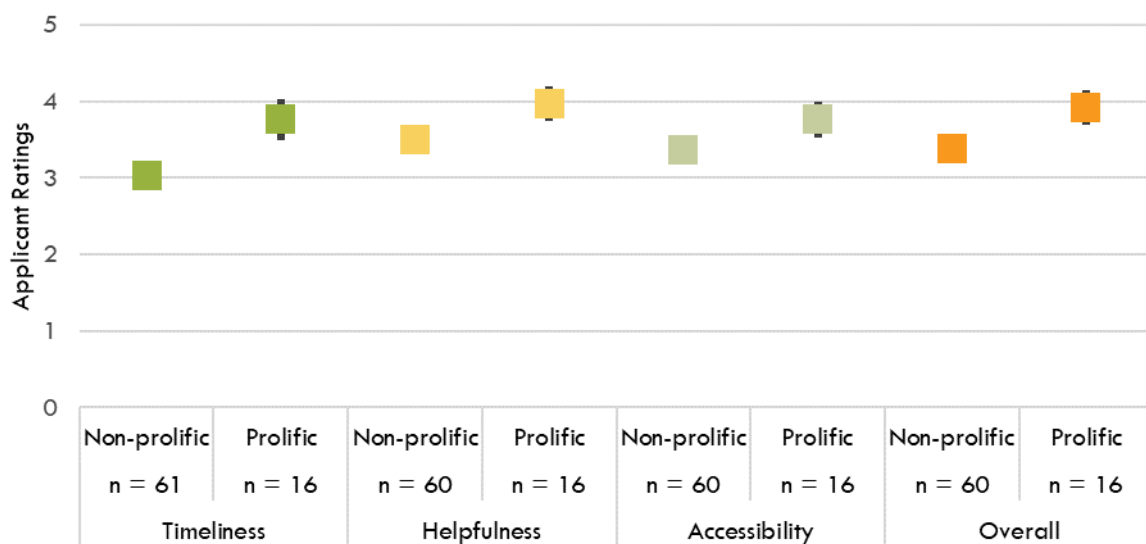
TABLE 4-6: APPLICANT REPORTED CHANGE IN TIMELINESS, HELPFULNESS, AND ACCESSIBILITY SATISFACTION LEVELS IN 2021-2022 VS. PRIOR YEARS

Program Administrator	Change in Satisfaction with...	More Satisfied in 2021-2022	Less Satisfied in 2021-2022	No Change	n
PG&E	Timeliness	37%	4%	59%	27
	Helpfulness	25%	5%	70%	20
	Accessibility	21%	11%	68%	19
SCE	Timeliness	32%	12%	56%	25
	Helpfulness	32%	5%	64%	22
	Accessibility	20%	10%	70%	20
SCG	Timeliness	23%	23%	54%	13
	Helpfulness	27%	9%	64%	11
	Accessibility	10%	20%	70%	10
CSE	Timeliness	25%	6%	69%	16
	Helpfulness	17%	8%	75%	12
	Accessibility	9%	18%	73%	11

Experience by Prolific Status and Budget Group

Figure 4-14 shows applicants average satisfaction ratings with PA timeliness, helpfulness, accessibility, and with the PA overall by their prolific status. Overall, prolific applicants were more satisfied with their interactions with PAs than non-prolific applicants. Prolific applicants were moderately to highly satisfied with all PA aspects and the PAs overall, with average scores between 3.8 and 4. Non-prolific applicants were less satisfied across all topics, with average scores ranging from 3.0 to 3.4.

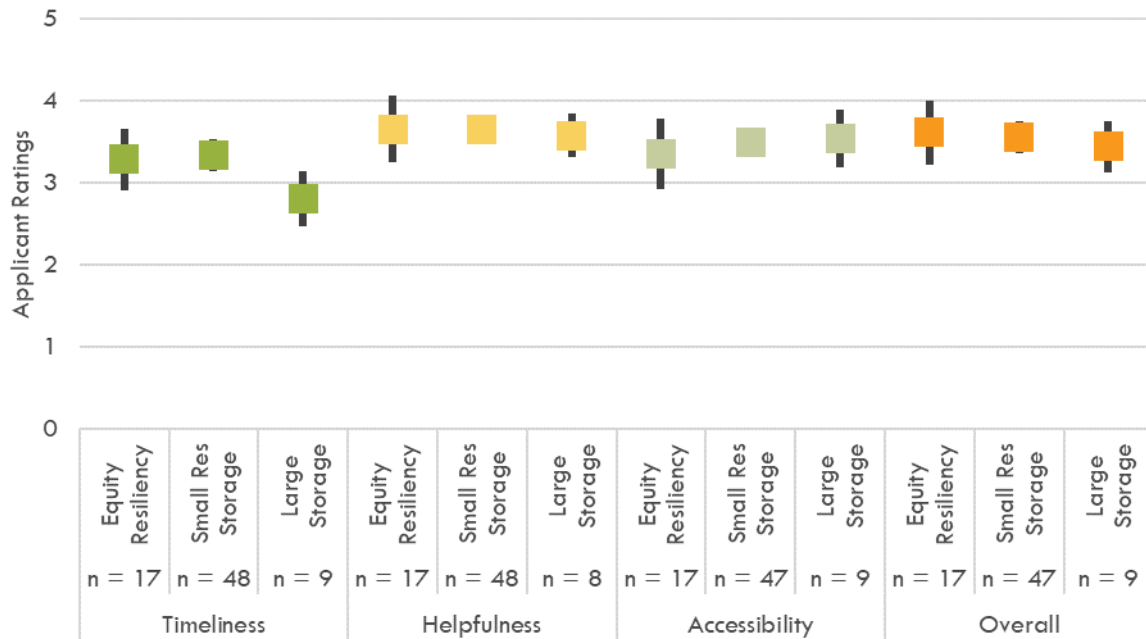
FIGURE 4-14: APPLICANT SATISFACTION WITH PA TIMELINESS, HELPFULNESS, ACCESSIBILITY, AND OVERALL BY PROLIFIC STATUS



Similarly, to determine if any correlation existed between applicant satisfaction and the SGIP budget group (Equity Resiliency, Large Storage, or Small Residential Storage), the evaluation team compared applicants’ satisfaction by budget group.²⁵ Figure 4-15 shows the average satisfaction levels reported by applicants by budget group. As this figure shows, Large-Scale Storage applicants reported lower satisfaction with PA timeliness but satisfaction across the other topic areas were very similar across budget group.

²⁵ Due to small sample sizes, Generation, San Joaquin Valley, Residential Storage Equity, and Non-Residential Storage Equity budget category applicants were excluded from budget group breakouts.

FIGURE 4-15: APPLICANT SATISFACTION WITH PA TIMELINESS, HELPFULNESS, ACCESSIBILITY, AND OVERALL BY BUDGET GROUP



Timeliness of Communications

Table 4-7 shows applicants’ satisfaction with the timeliness of PA communications has remained steady since 2020 for all PAs except PG&E, which has increased significantly and is now in line with the other PAs.

TABLE 4-7: APPLICANT SATISFACTION WITH PA TIMELINESS BY EVALUATION YEAR

PA	Evaluation Year 2021/2022			Evaluation Year 2020		
	N	Score	% Respondents Rating 1	N	Score	% Respondents Rating 1
PG&E	50	3.0	22%	82	1.8	49%
SCE	35	2.9	17%	59	3.0	14%
SCG	14	4.1	0%	28	4.1	4%
CSE	17	3.3	18%	43	3.4	19%

Rational for low PA timeliness ratings (1 or 2 out of 5) in 2021/2022 were very similar to prior years (no or very delayed response and unhelpful response that leads to additional project delays). Table 4-8 provides examples of reasons provided by applicants for their low satisfaction with PA timeliness.

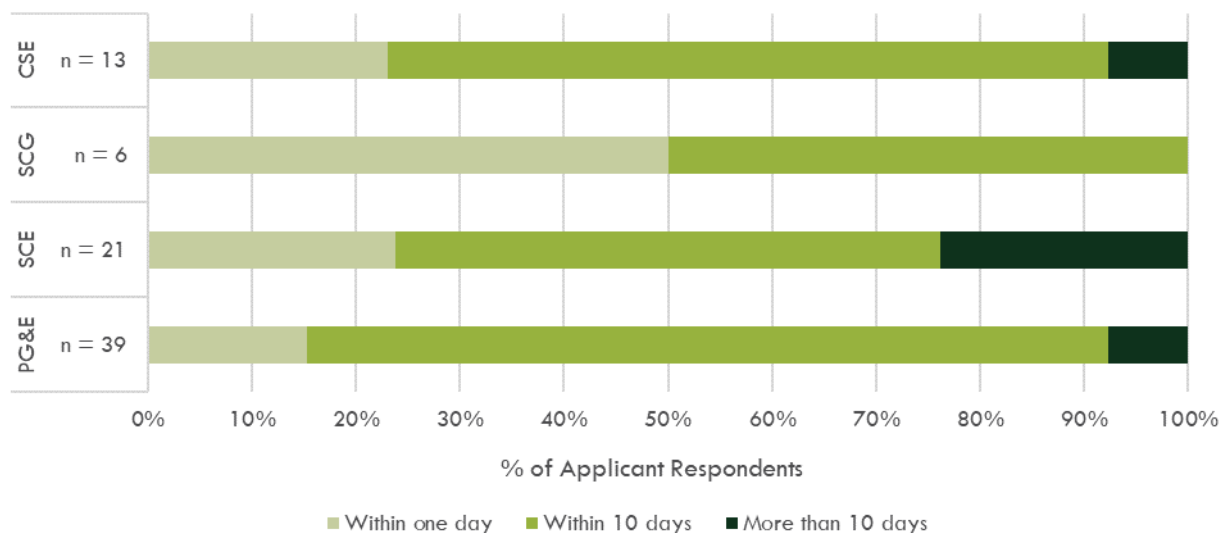
TABLE 4-8: REASONS PROVIDED FOR DISSATISFACTION WITH THE PAS’ TIMELINESS (RATING 1 OR 2)

Reason	Examples Provided by Respondents
No Response, untimely response	Never receive a response from PA
	The entire SGIP process was tedious and long, and it took forever to get responses back from the SGIP team [by email or phone] ... most of the time they would never even call me back.
	It took them a long time to reply ... I had to contact them multiple times for one reply. Other times I just never got an answer.
	Sometimes questions are pressing and I wish we [could] call a number and speak to a person on the phone. The only option then was to email and wait patiently for an answer. Sometimes I get replies in 3 days, other times its 10 days, so it's quite frustrating.
Unhelpful responses that lead to further delays	It is very cumbersome and many times it is very redundant. We answer the same question over and over...then instead of looking at the entire project it is sent back again with some other problem that another person flagged again.
	Call returns took days; emails were unclear; re-reviews of the project application took more than a month at a time.
	It takes weeks, sometimes months to get a resolution on a simple exception. If they would clarify their answers properly and not be so cryptic, the process would run smoother.

Average Time to Initial Response

Surveyed applicants were asked on average how long it took their PAs to initially respond to clarifying questions and other inquiries. The 2020 evaluation found all PA’s struggled to reply to applicant inquiries within 10 days (with one-quarter to more than one-half of applicants reporting waiting more than 10 days for a reply), however in 2021/2022 significantly fewer applicants reported having to wait more than 10 days, with only a small percentage of CSE and PG&E applicants and no SCG applicants reporting that they had to wait more than 10 days for a reply (Figure 4-16 below).

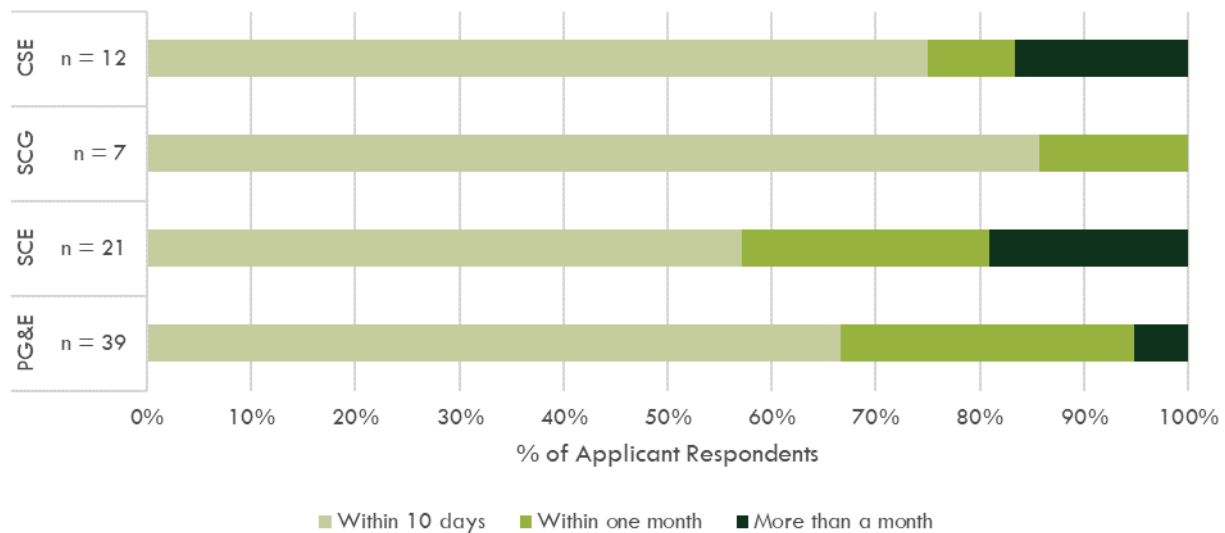
FIGURE 4-16: APPLICANT REPORTED AVERAGE TIME FOR INITIAL REPLY TO INQUIRY BY PA



Longest Time to Initial Response

Applicants were also asked about the longest amount of time it took to receive an initial response from their PA, and similar to the average time for a response, significantly fewer applicants in 2021/2022 reported waiting more than a month. Figure 4-17 below shows the majority of applicants across all PAs reported the longest time it took for a reply to an inquiry was less than 10 days (PG&E 67%, SCE 57%, SCG 86%, CSE 75%) and only few applicants reported waiting more than a month for a reply (CSE, SCE, and PG&E). This is a large improvement for PG&E where half of PY 2020 applicants surveyed reported they had waited more than a month for a reply to their inquiry. Across all PAs, there was an improvement in the reported longest time to receive a response to an initial inquiry. Notably no SCG applicants reported having to wait for more than a month for an initial reply.

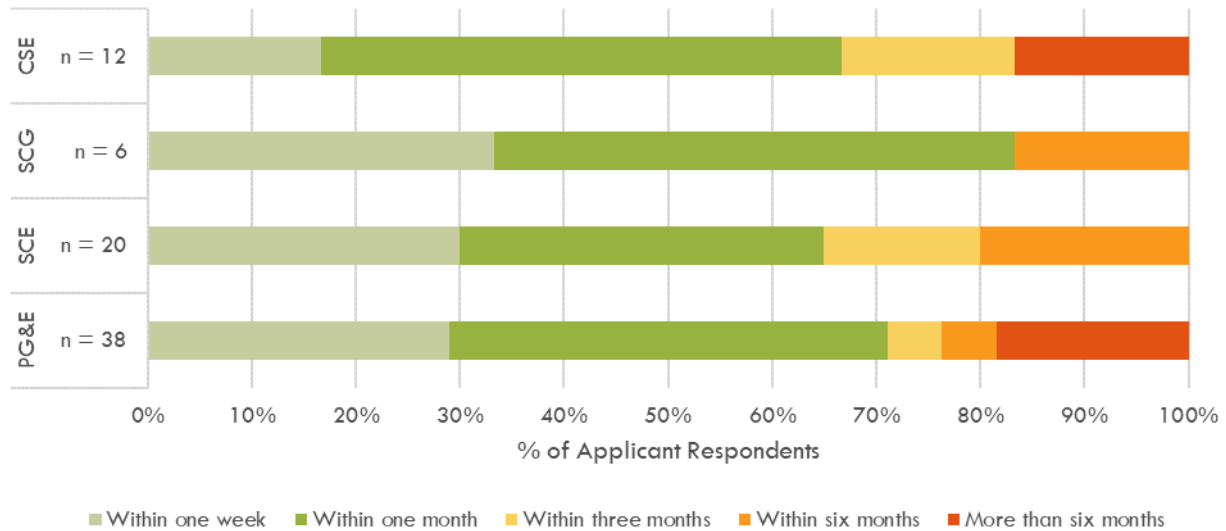
FIGURE 4-17: APPLICANT REPORTED LONGEST TIME FOR INITIAL REPLY TO INQUIRY BY PA



Time to Resolve an Issue

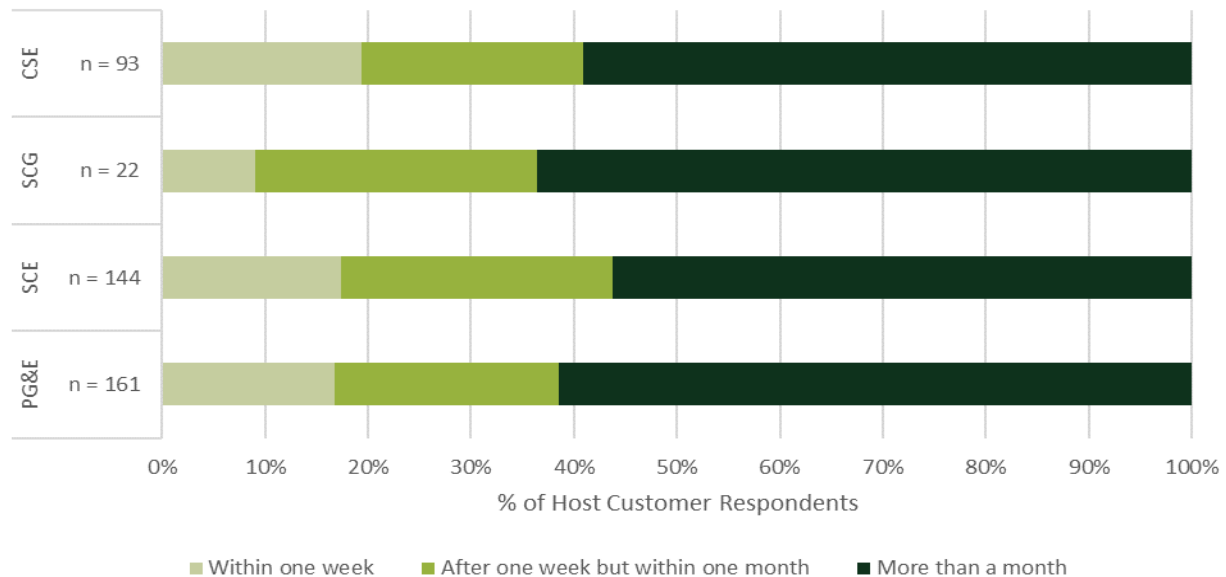
Applicants were also asked about the longest time taken, from start to finish, for issues to be resolved. Figure 4-18 shows that in 2021/2022 more than 60% of respondents reported that the PAs never took longer than one month to resolve an issue. While this is an improvement for all PAs (most notably PG&E for which only 36% reported issues were resolved within a month in 2020), PG&E and CSE both had nearly 20% reporting they had waited over six months for the PA to resolve their issue.

FIGURE 4-18: APPLICANT REPORTED LONGEST TIME TO RESOLVE ISSUE BY PA



Host customers also reported long wait times to get resolution for their issues or delays (Figure 4-19). In general, the wait times to resolve an issue reported by host customers tended to be longer than those reported by applicants. Across all PAs, roughly 60% of host customers reported that it took more than a month to get a resolution to their issues. For every PA, these times reported for issue resolution were slightly increased from the length reported in 2020.

FIGURE 4-19: HOST CUSTOMER REPORTED TIME TO RESOLVE ISSUES BY PA



Helpfulness

In 2021/2022, applicants reported moderate to high levels of satisfaction with PAs’ helpfulness (Table 4-9). Comparing applicants’ reported satisfaction with the PAs’ helpfulness in 2020 versus 2021/2022 shows that applicants found PG&E much more helpful in 2021/2022, whereas there was very little change in the reported helpfulness of the other PA’s. SCG continued to have zero applicants rate them with the lowest helpfulness rating of 1.

TABLE 4-9: APPLICANT SATISFACTION WITH PA HELPFULNESS BY EVALUATION YEAR

PA	Evaluation Year 2021/2022			Evaluation Year 2020		
	N	Score	% Respondents Rating 1	N	Score	% Respondents Rating 1
PG&E	49	3.5	10%	83	2.5	27%
SCE	34	3.2	12%	61	3.3	7%
SCG	14	4.3	0%	26	4.3	0%
CSE	16	3.4	19%	41	3.6	10%

Applicants’ rationale for their dissatisfaction with PA helpfulness in 2021/2022 was primarily related to the PAs delayed or lack of a response or support that was unclear, inconsistent, or unhelpful (as shown in the table below).

TABLE 4-10: REASONS PROVIDED FOR DISSATISFACTION WITH THE PAS’ HELPFULNESS (RATING 1 OR 2)

Reason	Examples Provided by Respondents
Slow or No Response	It took an extremely long time to get responses, it didn't move things forward, I kept getting directed to other people. Nobody seemed to care about getting my application through.
	[PA] Never responds
	The concerns eventually got resolved but not in a timely matter.
Unclear, Inconsistent, or Unhelpful Support	Hard to connect with PA and get answers.
	I feel like I am having to train the administrators and teach them the correct information. I would receive a notice of exception and it would rarely be clear as to what the appropriate answer should be when the administrator could have suggested, based on the information provided, what the answer should be. In one instance, an outside consultant working for SGIP provided me with an email response and contact information and I was actually able to discuss with that person the exception and get the exception resolved quickly.

Resolution to Application Inquiries, Issues, and Delays

Applicants and host customers were surveyed about their experiences working with the PA to resolve issues or delays they encountered throughout the application process. Almost all applicants reported having been informed by their PA that they had an incomplete application (i.e., missing equipment specification, monitoring plans, or signatures). A small proportion of these applicants (19%) reported having met with the PA to discuss the application issues and rated the helpfulness of these meetings highly

(average score of 4.5 up from 4.1 in 2020).

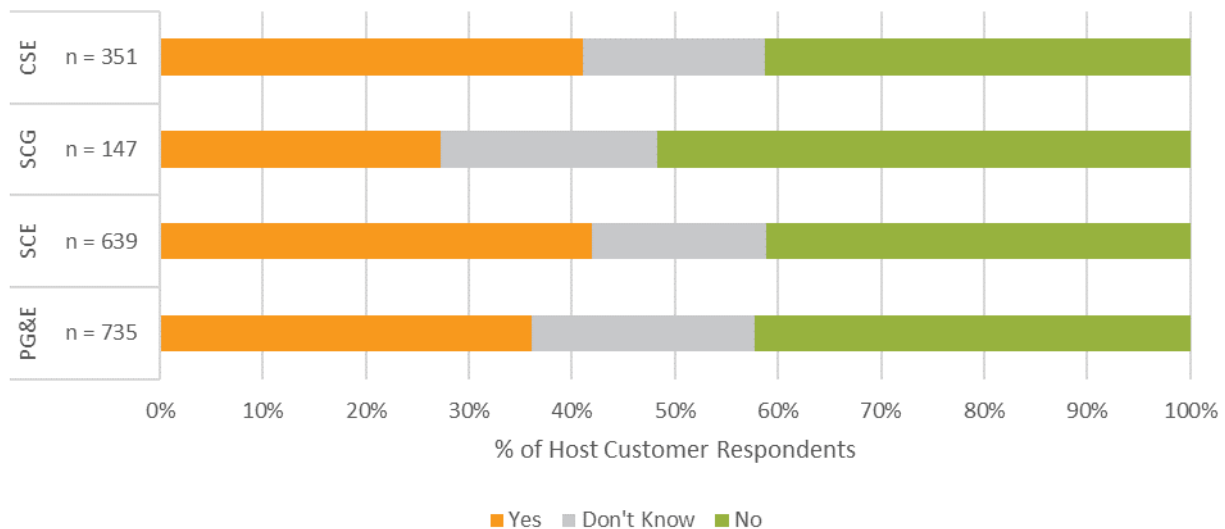
More than half of applicants also reported having a suspended application (ranging from 50% for PG&E to 74% for CSE) and the majority of these (79%) reported they understood the reason for the suspension (down slightly from 84% in 2020). Roughly half of respondents (55%) reported that the PAs helped them resolve their suspended projects. Applicants who had worked with their PA to resolve their suspended project reported moderately high satisfaction with the PAs regarding their assistance in 2021/2022 (Table 4-11) which was a significant increase from 2020.

TABLE 4-11: APPLICANT SATISFACTION WITH PA INVOLVEMENT IN RESOLVED SUSPENDED PROJECTS

PA	Average Rating 2021/2022	Relative Precision 90% Confidence	Number of Respondents	% Respondents Rate 5	% Respondents Rate 1	Average Rating 2020
PG&E	4.0	12%	15	53%	13%	2.5
SCE	4.2	10%	9	44%	11%	2.9
SCG	4.3	12%	3	33%	0%	3.1
CSE	4.3	12%	7	57%	0%	3.2

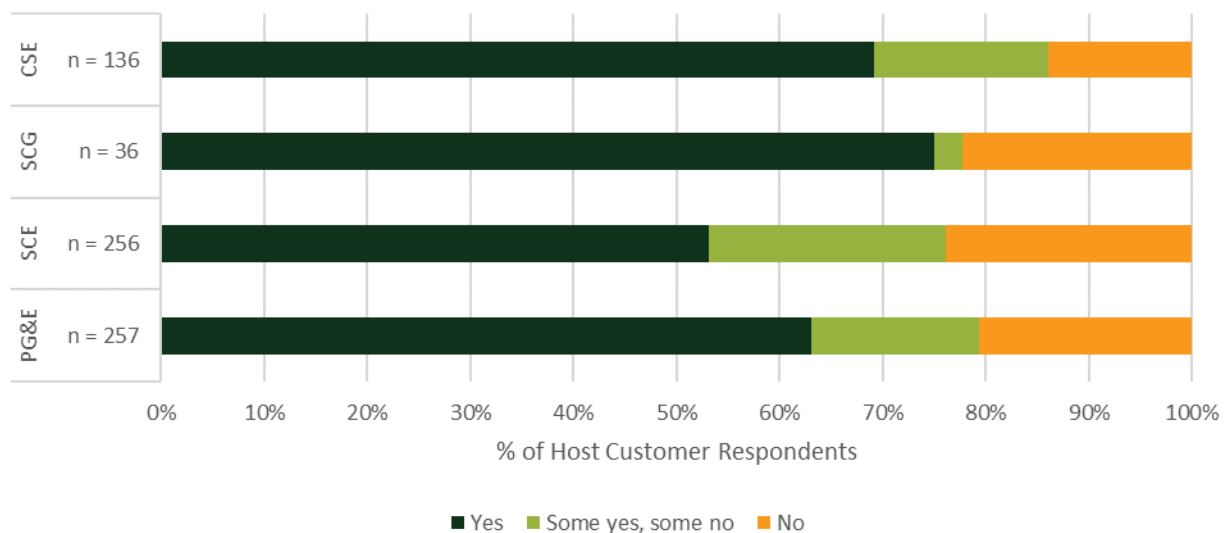
Host customers were asked if they experienced any problems, issues, or delays with their project(s), and if so, whether and how they were resolved. As shown in Figure 4-20, between 27% and 42% of host customers (rate varies by PA) recalled experiencing a problem or delay with their project. These findings are similar to the findings from 2020 for all PAs except PG&E which saw a marked decline (from 54% to 36%).

FIGURE 4-20: HOST CUSTOMER RECOLLECTION OF PROBLEMS, ISSUES, OR DELAYS BY PA



Host customers who have experienced issues or delays continue to report they are mostly related to delays in receiving their SGIP incentive (56%) or problems with their SGIP application (49%). While most host customers reported that their applicant helped them resolve their issue or delay (65% to 77%, depending on the PA), this was roughly a 10% decline across the board from 2020. The majority of host customers who had experienced an issue or delay reported that at least some of their issues had been resolved (Figure 4-21). CSE and PG&E experienced significant declines in the share of their host customers reporting their issue was never resolved (47% to 14% for CSE and 37% to 21% for PG&E).

FIGURE 4-21: RESOLUTION OF HOST CUSTOMER ISSUES, PROBLEMS, OR DELAYS BY PA



Accessibility

Applicants continue to utilize email most often (93%) to contact the PAs regarding questions or issues they have with their applications. Phone calls (45%), office hours (23%) and workshops (14%) were also current modes of communication. A comparison of applicants’ reported satisfaction with the PAs’ accessibility in 2020 versus 2021/2022 (Table 4-12) shows that while PG&E, SCE, and CSE were more accessible in 2021/2022 than in 2020, SCG continues to be the most accessible PA.

TABLE 4-12: APPLICANT SATISFACTION WITH PROGRAM ADMINISTRATOR ACCESSIBILITY BY EVALUATION YEAR

PA	Evaluation Year 2021-2022			Evaluation Year 2020	
	N	Score	% Respondents Rating 1	N	Score
PG&E	49	3.3	4%	83	2.2
SCE	34	3.1	12%	60	2.9
SCG	13	4.2	0%	28	4.2
CSE	16	3.6	13%	40	3.2

Applicants who reported low satisfaction with the PA’s accessibility were asked for the reasons for their rating. Applicants primarily reported frustration with the PA’s lack of response to emails or phone calls. One applicant summarized their dissatisfaction as it is “*very hard to get in touch with a PA. You send an email into the abyss and just have to wait. You never know if the email was received or reviewed*”.

4.1.4 Specific Program Elements

Applicants and host customers were asked about their perceptions and experience with several specific program elements, including SGIP websites, quarterly workshops, PA office hours (for the two PA’s who offered them).

Website

The website operated by the SGIP program (www.selfgenCA.com, also known as the statewide portal) and the PA-specific websites are important tools for applicants to obtain program documents, upload applications, check application status, learn about program updates, and access calculation tools. Applicants were asked a series of questions regarding their use and satisfaction with these websites.

The statewide portal and PA websites are updated with new program information and materials when there are relevant program changes. Overall, the SGIP PA websites have not changed substantially since 2020, however, several PAs mentioned making some additions to their SGIP websites over the last two years. SCE noted that they now offer a Public Safety Power Shutoff look up tool for customers and added fact sheets their websites. CSE stated they expanded their website from a single page site to a multi-page site and added some SGIP reference documents. SCG stated that they frequently updated information and repaired broken links but did not mention substantial website changes during 2021 and 2022 (but did mention that a redesigned website is expected to be released in 2023).

Applicants and host customers were asked whether they had visited the statewide portal or PA’s SGIP websites in the most recent year they participated. As shown in Table 4-13, in 2021/2022 applicants continued to report visiting the statewide portal more frequently than the PA websites, however the

percentage reporting they had visited the statewide portal has decreased since 2020 and the percentage reporting they had visited the PA websites has increased. Frequency of visiting of the PA websites by applicants who had visited was mixed with roughly one-third reporting they seldom visited them (once a month to once a year) and two-third reporting they visit them daily or weekly. The most common reasons applicants reported for visiting the statewide portal were to submit project application forms (81%), check on a project status (79%), and to find the SGIP handbook (69%). The most common reasons for applicants to visit the PA websites were to check project status (54%), to submit project application forms (50%), and to learn more about SGIP through FAQs and summarized information (50%).

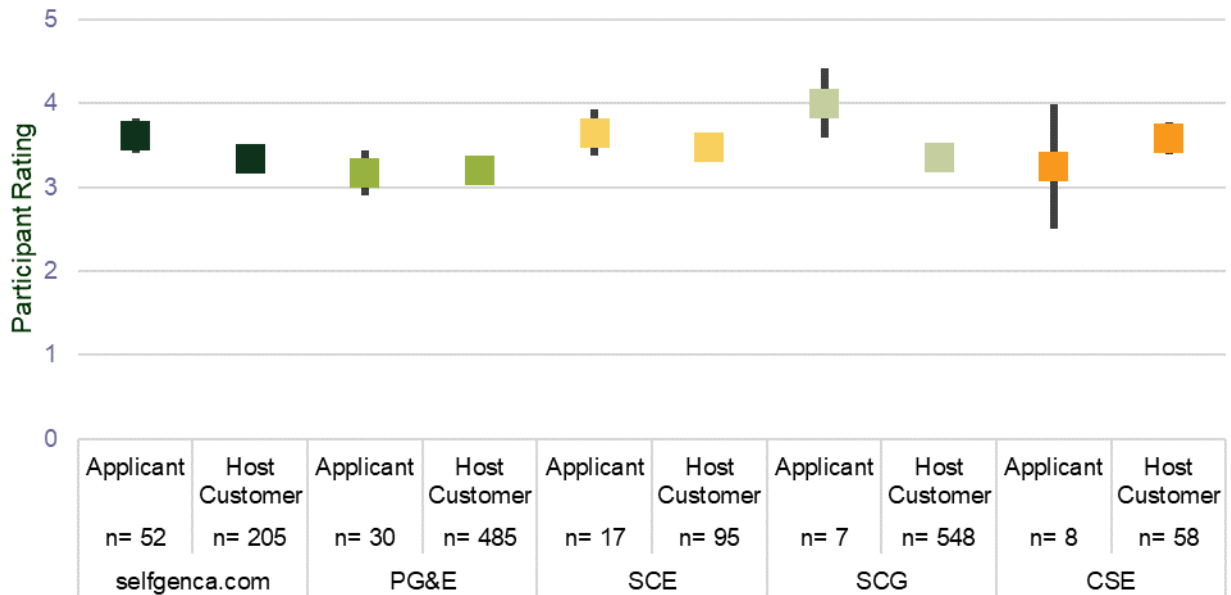
Host customers again reported visiting the PA websites more often than the statewide portal and PG&E and SCE host customers were roughly twice as likely to visit the PA’s websites than SCG and CSE host customers. More than one-third of host customers (38%) reported they had not visited the statewide portal or the PA websites. The most reported reasons for visiting SGIP websites were to learn more about the program structure (50%) and to check application status (35%).

TABLE 4-13: APPLICANT AND HOST CUSTOMER WEBSITE USE

Website	Evaluation Year 2021-2022		Evaluation Year 2020	
	% Applicants visiting	% Host Customers	% Applicants visiting	% Host Customers
Statewide Portal	74%	12%	89%	19%
PG&E	68%	68%	54%	73%
SCE	60%	87%	37%	91%
SCG	56%	42%	21%	35%
CSE	53%	28%	26%	31%

Applicants and host customers were asked to rate the usefulness of the statewide portal and of the PAs’ SGIP websites, using a 1 to 5 scale. Figure 4-22 shows that applicant and host customer ratings were moderate to high for the statewide portal and the PA websites. The below table presents some of the reasons applicants gave for low levels of satisfaction (1 or 2 out of 5) with the PA websites.

FIGURE 4-22: APPLICANT AND HOST CUSTOMER RATINGS OF WEBSITE USEFULNESS



Applicants and host customers who provided very high or low satisfaction with the usefulness of SGIP websites were prompted for their reason for providing these rankings. Table 4-14 provides reasons provided by applicants (and the website their response was in reference to).

TABLE 4-14: REASONS FOR SATISFACTION OR DISSATISFACTION WITH SGIP WEBSITES

Satisfaction Level	Reason Provided by Applicant
Highly Satisfied with SGIP Websites (rating of 5)	I can find everything that I need on the website. [SelfGenCA]
	It has a lot of useful resources [SelfGenCA]
	Everything I need is at my disposal with regard to category budgets or forms. [CSE website]
	It has all the resources I need and allows me to track all my applications and make sure none fall through the cracks on my end. [CSE website]
Highly Dissatisfied with SGIP Websites (rating of 1 or 2)	The information was scattered and often not directly in the handbook but listed on one webpage but not another one. I had to hunt down the information rather than go to one spot to find it. [SelfGenCA, PG&E website]
	It didn't help me understand what I needed to change in my application. The SGIP handbook was not helpful either. [PG&E website]
	Information was generally too vague, and organization wasn't clear. [PG&E website]
	<PA>'s website in general is very full of bugs and is not intuitive. [SCE website]

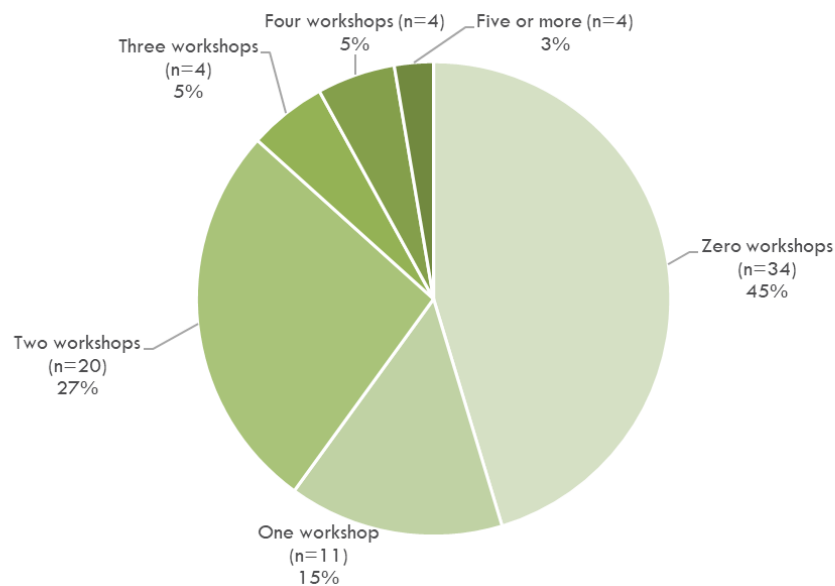
Workshops

Quarterly workshops are a resource made available to SGIP participants to educate them about program rules and procedures, updated incentive levels and structures, eligible measures, and related topics. In-

person attendance can also provide an opportunity for networking with the PAs and staff from other firms. Workshops can be attended in person or virtually and slides from past quarterly workshops are posted on the statewide portal.

Applicants were asked about the frequency of their workshop attendance in the past two years. As shown in Figure 4-23, 53% of surveyed applicants reported having attended at least one quarterly workshop in 2021 or 2022. Applicants that attended at least one workshop reported an average satisfaction score of 3.4 on a 5-point scale, indicating moderate levels of satisfaction with the quarterly workshops. This rating is consistent with the average quarterly workshop satisfaction rating provided in the 2020 PA evaluation (3.5 on a 5-point scale).

FIGURE 4-23: APPLICANT PARTICIPATION AT QUARTERLY WORKSHOPS IN 2021-2022



The most common reasons that applicants reported attending the workshop include to hear questions and answers from other applicants (76%), learning about program changes (68%), learning about general program information (68%), and to ask specific questions to program administrators (49%). For those applicants that didn't attend any workshops, the most common reason cited was that they didn't know about the workshops (58%) or that their schedule didn't allow it (21%).

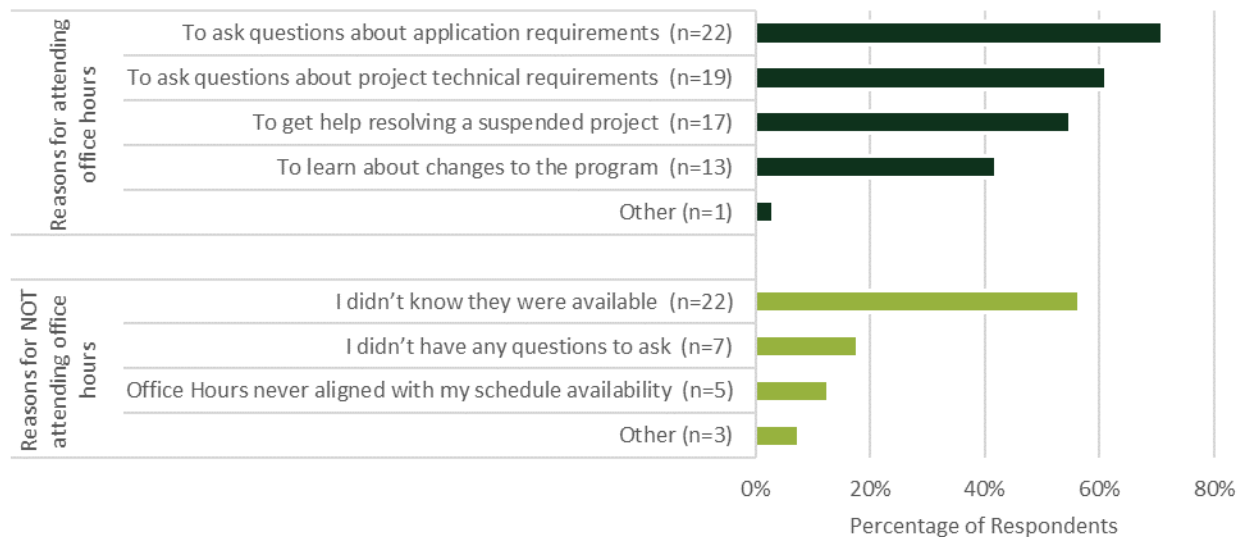
Due to Covid-19, workshops were moved to an online format in 2021 and then to a hybrid in person attendance with available online attendance once in person workshops resumed. Several applicants noted that they appreciated the online attendance option and felt that it made these workshops more accessible.

PG&E and SCE Office Hours

PG&E and SCE tend to have the largest number of applications submitted to the SGIP year over year. As a result, there are more applicants that have questions related to the SGIP process and the varying aspects surrounding them. To help make themselves more available, PG&E and SCE began holding office hours in 2021 so SGIP applicants could have a forum to ask their questions directly. Roughly 46% of PG&E and/or SCE applicants reported that they had attended office hours either with one or both PAs.

Figure 4-24 presents the reasons applicants provided choosing to attend or *not* to attend office hours. The most common reasons for attending office hours were to ask PG&E and SCE about application requirements, project technical requirements, or to get help resolving a suspended project (71%, 61% and 55% of respondents respectively). The main reason applicants provided for not attending office hours was a lack of awareness of the PA hosted office hours, rather than a lack of need (55% of applicants who did not attend office hours were unaware office hours were available). Only 18% reported they did not attend office hours due to a lack of questions for the PAs.

FIGURE 4-24: APPLICANT REASONS FOR ATTENDING AND NOT ATTENDING OFFICE HOURS



Applicants who attended PG&E and SCE office hours reported they were generally satisfied with the office hours. On average, applicants ranked their satisfaction with office hours as a 4.1 on a scale from 1 to 5, with only one respondent provided a rating below a 3.

4.2 OVERALL PARTICIPANT SATISFACTION

4.2.1 Satisfaction with Program Administrator

Applicants and host customers were asked to rate their satisfaction, on a scale of 1 to 5, for each PA with whom they had submitted an SGIP application in 2021 or 2022. As shown in Table 4-15, 2021/2022 applicants reported on average moderate satisfaction with SCE (3.2), CSE (3.4), and PG&E (3.5) and moderately high satisfaction SCG (4.1). In general, applicants’ satisfaction ratings for SCE, CSE and SCG PAs have remained steady since the 2020 evaluation with improvement from PG&E.

TABLE 4-15: APPLICANT OVERALL SATISFACTION WITH PROGRAM ADMINISTRATOR

PA	Average Rating 2021-2022	Rel. Prec. 90% Conf	# of Respondents	% Respondents Rate 5	% Respondents Rate 1	Average Rating 2020
PG&E	3.5	7.0%	49	20%	10%	2.3
SCE	3.2	13.7%	34	26%	12%	3.2
SCG	4.1	5.2%	14	43%	0%	4.2
CSE	3.4	12.5%	16	25%	19%	3.3

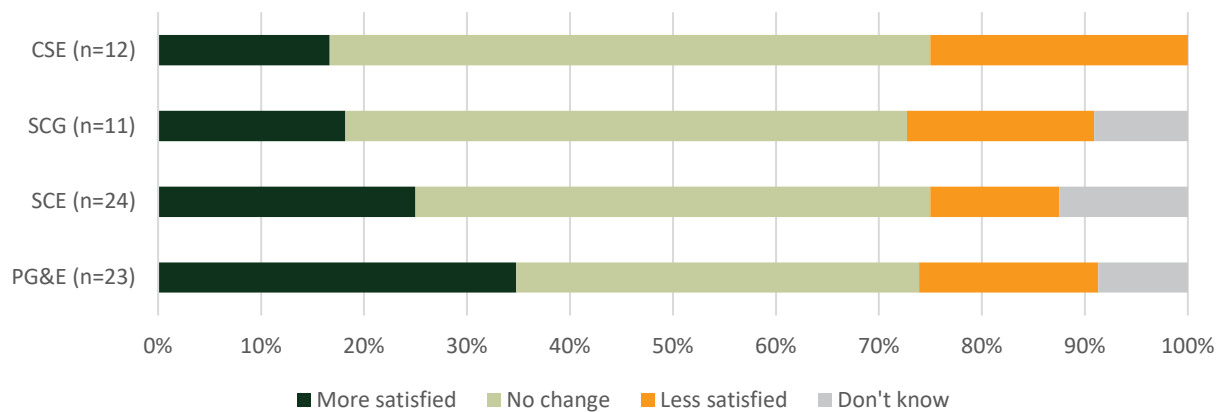
While most applicants are satisfied with their PAs, there are still a number of applicants that were not satisfied with their overall experience with their SGIP PA. Applicants who provided low satisfaction rankings (1 or 2) were asked why they were dissatisfied with their PA. Primary reasons were lack of support in resolving application issues, difficulties related to communication, and to the application process and timeliness. Examples of the reasons they provided are presented in Table 4-16 below.

TABLE 4-16: REASONS FOR DISSATISFACTION WITH THE PROGRAM ADMINISTRATOR (RATING 1 OR 2)

Reason	Examples Provided by Respondents
Lack of Support Resolving Issues	[PA] never resolved anything. Each time [we] submitted requested information, [PA] would follow up with more questions/requests for additional information ...after two years of endless requests from I [gave up]. I had invested more time and energy than the rebate was worth.
	[I was] recently asked for a change form. [There was] no explanation as to where to get this or what it was. [There was] no change form listed anywhere in the documents.
	The [PA] were able to answer questions but not provide a clear path to a resolution.
Difficulty with Communication and Long Wait Times between Communication	It is very hard to get in touch with the PA's and it takes a long time. These applications can be time sensitive so the slow process and lack of accessibility to PA's is definitely frustrating. Once you do get in touch with a PA, they have typically been very helpful.
	There is no direct line to communicate with PA's. No ability to call them, just send an email to the generic email address and then wait days or weeks for a response...frustrating.
	Very long wait times for response. Have been told not to request project extensions until within 30 days of deadline, but program response time is greater than 30 days.
	Very difficult to get through to ask a question or explain a problem. Almost not available at all. The phone people just tell you to email or I reach a voicemail box asking me to leave a message.
Difficulties with Application Process and Timelines	The average time to answer an email can be longer than the time allowed to resolve the issue.
	This program is great for the customer but a nightmare for our company. It is very cumbersome and takes up to or over a year to get payment. We often have to [resubmit] the same information again and again.
	You can provide office hours or workshops all you want, but you really need to streamline and simplify the application process so a bunch of education isn't needed to submit and qualify.
	It has been open ended timeline from [PA] while we are forced to answer and upload in short time without any support from [PA] support staff. We have spent so much time in documentation instead of implementing the battery system.

Applicants who participated in the SGIP across multiple years were asked if there was a change in their PA satisfaction levels in their most recent year of participation (2021 or 2022) compared to prior years. As seen in Figure 4-25, the most common response for all PAs was no change in satisfaction compared to prior years (PG&E 39%, SCE 50%, SCG 55%, and CSE 58%). Additionally, roughly a third of PG&E respondents stated that their overall satisfaction with PG&E has increased compared to prior years. This is consistent with the relatively constant score overall PA satisfaction scores for SCE, SCG, and CSE and increase in PG&E satisfaction. It should be noted however that all PAs had a mix of applicants that reported feeling more satisfied and less satisfied between years of participation.

FIGURE 4-25: APPLICANT OVERALL SATISFACTION WITH PA COMPARED TO PRIOR YEARS



Host customers were also asked about their overall satisfaction with the PAs regarding the SGIP. As shown in Table 4-17 below, across the board, host customers reported moderate levels of satisfaction with the PAs in 2021 and 2022. However, host customer satisfaction levels for SCG and CSE decreased from satisfaction levels reported in 2020, whereas SCE had a slight decrease, and PG&E had a modest increase. While many host customers were satisfied with their experience with the PAs, several grievances were common among those who were dissatisfied. These included lack of communication or miscommunication regarding application issues and timelines. One host customer noted *“Not enough updates. Never knew where application stood or when rebate was going to be issued.”* and another stated *“Infrequent and unclear communications from [PA]. I could not figure out the status of my application, what was missing, or under what kind of timeframe I could expect a rebate.”* Many respondents indicated that they felt the process took too long to receive their rebate or get approved for SGIP incentives. Host customers also reported that they were dissatisfied due to incentive payments being smaller than initially expected. This was likely due to misunderstandings related to step changes and incentive amounts as funds become reserved.

TABLE 4-17: HOST CUSTOMER OVERALL SATISFACTION WITH PROGRAM ADMINISTRATOR

PA	Average Rating 2021-2022	Rel Prec 90% Conf	# of Respondents	% Respondents Rate 5	% Respondents Rate 1	Average Rating 2020	Average Rating 2021*	Average Rating 2022*
PG&E	3.1	2.2%	667	16%	19%	2.9	3.1	2.9
SCE	3.2	2.2%	609	22%	16%	3.3	3.3	3.2
SCG	3.6	3.6%	131	24%	7%	3.9	3.6	3.7
CSE	3.4	2.8%	306	22%	13%	3.7	3.4	3.3

4.2.2 Satisfaction with Program Application Steps

Applicants and host customers were asked a series of questions regarding their satisfaction with specific program application steps and procedures. The findings are summarized in the following section.

Application Submission Process

Applicants were asked to report their satisfaction with the application submission process. Table 4-18 shows that SCG applicants reported moderately high satisfaction in 2021/2022 (3.8), which was an increase from 2020. PG&E applicants, who reported lower levels of satisfaction in 2020 than the other PAs (2.6), had the most significant increase in 2021/2022 (3.1). SCE and CSE applicants both reported moderate satisfaction levels (3.4 and 3.6, respectively, which was no change SCE and a slight decrease for CSE).

TABLE 4-18: APPLICANT SATISFACTION WITH APPLICATION SUBMISSION PROCESS

Program Administrator	Average Rating 2021-2022	Rel. Prec. 90% Conf	# of Respondents	% Rating 5	% Rating 1	Average Rating 2020
PG&E	3.1	6.8%	51	6%	18%	2.6
SCE	3.4	13.4%	33	24%	6%	3.4
SCG	3.8	6.0%	18	22%	0%	3.5
CSE	3.6	11.4%	19	37%	11%	3.8

Applicants who provided low satisfaction rankings (1 or 2) stated why they were dissatisfied with the application submission process. The primary reasons were that it was too cumbersome and slow. Examples of the reasons they provided are presented in Table 4-19 below.

TABLE 4-19: REASONS FOR DISSATISFACTION WITH THE APPLICATION SUBMITTAL PROCESS (RATING 1 OR 2)

Reason	Examples Provided by Respondents
Cumbersome	[The SGIP is] difficult for someone with cursory knowledge to apply. Due to massive handbook and rules, it's almost a full-time job for someone and small companies do not have the budget for [the SGIP] these applications and they often come back with multiple deficiencies. An easier application process with clearer instructions/guidelines and help available would be appreciated.
	Overall, the large scale of necessary and required information was the most tedious process I've ever been through. The old CSI and the Federal Tax Credit process is so much more pleasant... It was my [first] time [applying for] the SGIP...there is zero doubt that [is] my last time using SGIP. [Any potential client] who wants it, I will pass on their project quickly.
	Took almost a year to complete... I found that the process catered to big org and vendors and not to me as individual struggling to understand and complete the process. I quit and restarted the process multiple times due to my frustrations with SGIP.
Slow	The whole process is extremely time consuming and non-forgiving.
	I personally spent over 100 hours on the submission. At the end, my time would have been better spent working and making money versus working with SGIP on a rebate.

Paperwork Requirements for Proof of Project Milestone

Applicants were asked to report their satisfaction levels with the paperwork requirements for the proof

of project milestone (PPM) stage. As shown in Table 4-20, applicants were moderately to highly satisfied with the paperwork requirements for PPM (ratings ranging from 3.9 to 4.4). It should be noted that across all PAs the paperwork requirements for PPM increased from the 2020 rating.

TABLE 4-20: APPLICANT SATISFACTION WITH PAPERWORK REQUIREMENTS FOR PPM

Program Administrator	Average Rating 2021-2022	Rel. Prec. 90% Conf	# of Respondents	% Rating 5	% Rating 1	Average Rating 2020
PG&E	3.9	11.7%	4	25%	0%	2.8
SCE	4.0	13.5%	4	25%	0%	3.0
SCG	4.4	23.7%	2	50%	0%	2.7
CSE	4.0	22.2%	3	33%	0%	3.0

Paperwork Requirements for Incentive Claim Stage

As shown in Table 4-21, applicants were asked to report their satisfaction levels with the paperwork requirements for the incentive claim stage. PG&E applicants reported moderately low levels of satisfaction with this stage, while SCE and SCG applicants reported moderate levels of satisfaction. CSE applicants reported slightly higher satisfaction levels. Many applicants reported that the documentation requirements for the ICF stage were repetitive, redundant, or unnecessary.

TABLE 4-21: APPLICANT SATISFACTION WITH PAPERWORK FOR INCENTIVE CLAIM STAGE

Program Administrator	Average Rating 2021-2022	Rel. Prec. 90% Conf	# of Respondents	% Rating 5	% Rating 1	Average Rating 2020
PG&E	2.8	13.4%	32	13%	25%	2.7
SCE	3.3	10.7%	25	12%	20%	3.4
SCG	3.4	13.8%	14	21%	21%	3.1
CSE	3.7	11.8%	14	29%	14%	3.4

Inspection Process

As shown in Table 4-22, applicants from all PAs reported moderately high to high levels of satisfaction with the inspection scheduling process (ratings range from 3.7 to 4.2). Each PA saw slight improvements in the applicant ratings of the SGIP inspection scheduling process from the 2020 evaluation.

TABLE 4-22: APPLICANT SATISFACTION WITH INSPECTION SCHEDULING

Program Administrator	Average Rating 2021-2022	Rel. Prec. 90% Conf	# of Respondents	% Rating 5	% Rating 1	Average Rating 2020
PG&E	3.7	25.2%	31	32%	6%	3.3
SCE	4.0	21.5%	24	38%	0%	3.9
SCG	3.9	28.6%	14	43%	0%	3.8
CSE	4.2	26.4%	13	46%	0%	3.7

In 2021/2022, the host customers who had made it to the inspection scheduling process reported being fairly satisfied with the process (ratings range from 3.4 through 4.1). CSE host customers resorted slightly lower ratings compared to a satisfied rating of 4.7 in 2020; however, CSE customers remain the most satisfied, on average, with the inspection scheduling process.

TABLE 4-23: HOST CUSTOMER SATISFACTION WITH INSPECTION SCHEDULING

Program Administrator	Average Rating 2021-2022	Rel. Prec. 90% Conf	# of Respondents	% Rating 5	% Rating 1	Average Rating 2020
PG&E	3.4	4.3%	116	20%	10%	3.4
SCE	3.8	4.0%	88	35%	1%	3.7
SCG	3.9	6.9%	29	38%	7%	3.7
CSE	4.1	6.4%	32	44%	3%	4.7

Incentive Timeline

Applicants were asked to report their satisfaction with the time it takes to receive the upfront incentive. Table 4-24 shows that applicants in SCE, CSE, and SCG reported moderate satisfaction levels with the timeline (3.2, 3.2, and 3.3 respectively), while applicants with PG&E were less satisfied (2.8). Some applicants who were dissatisfied with the time to receive the incentive mentioned that the process took significantly longer than expected, or that they have never received the incentive.

TABLE 4-24: APPLICANT SATISFACTION WITH TIME TO RECEIVE INCENTIVE

Program Administrator	Average Rating 2021-2022	Rel. Prec. 90% Conf	# of Respondents	% Rating 5	% Rating 1	Average Rating 2020
PG&E	2.8	15.4%	26	15%	27%	2.7
SCE	3.2	11.7%	21	14%	14%	3.7
SCG	3.3	15.6%	13	23%	23%	3.7
CSE	3.2	14.9%	12	17%	17%	3.2

Similar to 2020, host customers expressed moderate satisfaction with the time it takes to receive the upfront incentive (ranging from 3.1 to 3.7 in 2021/2022).

TABLE 4-25: HOST CUSTOMER SATISFACTION WITH TIME TO RECEIVE INCENTIVE

Program Administrator	Average Rating 2021-2022	Rel. Prec. 90% Conf	# of Respondents	% Rating 5	% Rating 1	Average Rating 2020
PG&E	3.3	2.5%	409	20%	14%	3.5
SCE	3.7	2.7%	228	30%	5%	3.4
SCG	3.6	5.0%	73	23%	7%	3.6
CSE	3.1	4.7%	127	16%	14%	3.7

PBI Payment Process

Unlike in 2020, where only three applicant respondents and one host customer respondent eligible to rate their satisfaction with the Performance Based Incentive (PBI) payment process, the 2021/2022 survey fielded 33 applicant responses, allowing for analysis. Applicants reported moderate satisfaction with the PBI payment process for all PAs (ranging from 3.0 to 3.5).

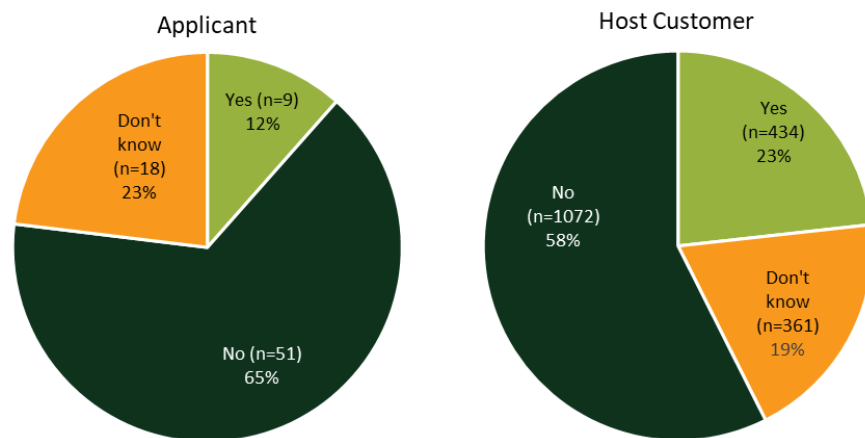
TABLE 4-26: APPLICANT SATISFACTION WITH PERFORMANCE-BASED INCENTIVE PAYMENT PROCESS

Program Administrator	Average Rating 2021-2022	Rel. Prec. 90% Conf	# of Respondents	% Rating 5	% Rating 1
PG&E	3.0	18.8%	10	20%	30%
SCE	3.3	13.9%	12	17%	17%
SCG	3.0	28.4%	7	29%	29%
CSE	3.5	25.1%	6	33%	17%

4.3 EXPERIENCE SGIP AND THE INVESTMENT TAX CREDIT (ITC)

While the federal ITC is out of the scope of responsibility for the SGIP PAs, claiming the ITC is a source of additional complexity when applying for an SGIP incentive. As a result, applicants and host customers were asked about their experience related to their SGIP project and the federal ITC. As presented in Figure 4-26, most applicants and host customers reported they did not receive any guidance related to filing for the ITC or did not know whether they received any guidance (88% and 81%, respectively). While the PAs are not responsible for providing tax advice or guidance on the ITC, several applicants stated they had received guidance from the PAs and SGIP related websites. The guidance given to these applicants was generally related to the share of the project cost that is eligible for the ITC.

FIGURE 4-26: SHARE OF APPLICANTS AND HOST CUSTOMERS RECEIVING GUIDANCE ON CLAIMING THE ITC



Host customers similarly sought guidance on the eligible amount for the ITC. Host customers most sought guidance on how to apply for the ITC (including guidance on documentation and requirements), project cost eligibility, and the expected dollar amount of the tax credit. Host customers seldom reached out to the PAs to for this guidance (only 8% of host customers who received guidance). Most host customers reached out to their project developer or installer (70%) for guidance, and an additional 20% received guidance from a CPA or tax preparer.

Applicants were asked what cost basis they use or advise their customers to use when claiming the ITC. As seen in Figure 4-27, nearly two-thirds of the surveyed applicants reported that they either did not know what cost basis was advised or stated that they did not advise their customers on what cost basis to use for the ITC or indicated the ITC was not going to be claimed for the SGIP project. Of the remaining third of responding applicants, 20% reported that they advised their customers to claim the full cost of the system, 13% advised them to claim the partial cost of the system (net the SGIP incentive).

FIGURE 4-27: APPLICANTS' COST BASIS ADVICE TO CUSTOMERS CLAIMING THE ITC

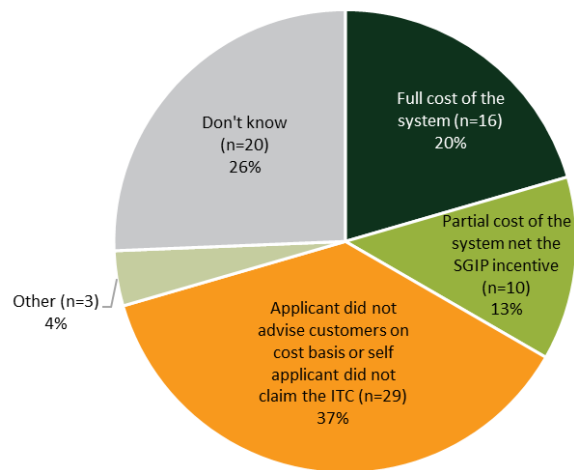
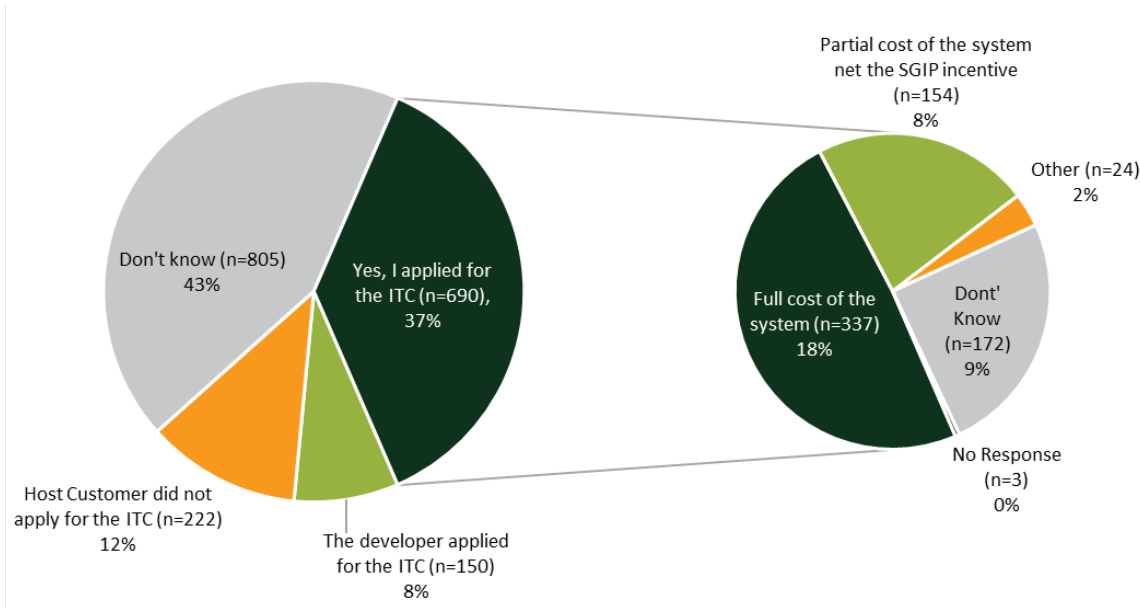


Figure 4-28, below presents the share of host customers reporting applying for the ITC and the cost basis used for ITC. Most host customers (43%) were unsure if they had claimed the ITC, however of those who were aware most reported they (37%) or their developer (8%) were claiming the ITC. Leaving 21% of host customers not claiming the ITC. Of the host customers that claimed the ITC, roughly half claimed the full cost of the system and a quarter claimed the partial cost of the system. The remaining quarter did not recall the cost basis they used. Nearly all host customers stated that they received the expected tax credit amount (94%), roughly 6% stated that they received a smaller credit than expected and a small number of customers stated that the ITC credit amount was more than the expected amount.

FIGURE 4-28: SHARE OF HOST CUSTOMERS WHO APPLIED FOR THE ITC AND COST BASIS USED FOR THE ITC



APPENDIX A SURVEY INSTRUMENTS

This section contains the following survey instruments:

A.1 – 2021-2022 SGIP PA In-Depth Interview Guide

A.2 – Applicant Survey Instrument

A.3 – Host Customer Survey Instrument

A.1 2021-2022 SGIP PA In-Depth Interview Guide

Introduction: The purpose of this interview is to gather information about your experience administering the SGIP during 2021 – 2022, learn about recent program changes that may influence our study, and hear from you about challenges and process improvements.

1. For each person participating in the interview: What is your title and role? How long have you been on the SGIP team for [PA]?
2. Can you tell us about how your organization, as a SGIP PA, is structured? Have you made any changes to this over the last two years?
3. The SGIP handbook and associated program rules are regularly changed throughout a program year. Examples from prior years include creating new budget categories and virtual audit protocols. What changes to program implementation have been introduced since 2021?
 - For each change ask:
 - When did the change occur?
 - How did these changes impact applicants or SGIP participants? Has there been any feedback from applicants about this change?
 - What changes (if any) were made at [PA] to accommodate these changes (e.g., Staffing/management, marketing, communications protocols, compliance verification, other general approach)?
 - a. If applicable: Why were these staffing changes made?
 - b. If applicable: Were staffing changes made in anticipation of step openings and corresponding increases in activity?
4. What changes, if any, were made to program requirements or communications protocols in response to the COVID-19 pandemic?
5. Do you offer office hours to help with applications? If so, what has been your experience providing this service?
6. How many quarterly workshops were held during 2021 and 2022? What feedback have you received from attendees? When is the next quarterly workshop?

Program Awareness

1. What marketing and outreach did you perform during 2021 and 2022?
2. How do most SGIP participants hear about the program?
 - Do equity and resiliency participants hear about the program through different channels than other budget categories?
3. Does [PA] take steps to increase customer awareness of the SGIP program and its offered technologies in various customer segments (e.g., small residential, non-residential, generation, storage, etc.)

- If so, please elaborate.
4. In your view, what should the role of SGIP PAs be in providing education and outreach for equity and resiliency segments of the population?
 - Do you have insight into what SGIP applicants and developers are doing for SGIP ME&O? If so, please share these insights.

Application Process

1. Do you have any internal goals for maintaining response times, KPIs, etc.? What challenges do you face meeting your goals?
2. **(If not covered previously)** Since 2020, have any changes been made to your communications protocols (e.g., communications channels [email/phone/in-person/online/webinar/print], who receives communications [applicant/host customer], inquiry response time)?
 - Do you have any changes you are considering going forward?
3. **(If not covered previously)** Since 2020, have you made any changes affecting the average time for payment processing once the applicant has submitted all required paperwork?
4. Are there any specific areas of the application submittal and review process that could potentially be confusing for applicants/host customers? What do you get the most questions about?
 - What has [PA] done to try and address the confusing aspects of the program? Is there anything [PA] plans on implementing in the future to resolve this confusion?
 - Is there anything you think could be improved to make things less confusing?
5. **(If not covered previously)** Since 2020, have any changes been made to the [PA] SGIP website?
6. **(If not covered previously)** Since 2020, have any changes been made to the selfgenca.com application portal?
7. Have there been any changes, or do you have any observations, about data flow related to applications? Does the PA have access to all utility data necessary for application approval, or must it be provided by participants?

Final Questions

1. Is there any other program aspect, event, or change in 2021 or 2022, that we haven't already covered, that you think could have an affect applicant's or host customers perception on [PA]'s timeliness, accessibility, and helpfulness?
2. Are there any program changes or process improvements completed in 2023 or planned for 2023 that we should be aware of?
3. Are there any key applicant or host customer satisfaction or process related questions you would like to see explored in this evaluation?

A.2 Applicant Survey Instrument

This survey instrument was used to interview the SGIP Applicants for the 2021 and 2022 SGIP PA Performance Evaluation.

SURVEY INPUT VARIABLES

Variable	Description
PgmYear	Program Year of Participation (takes values of 2021, 2022, or 2021 and 2022)
LastYear	Most recent year of Participation (takes value of 2021 or 2022)
FirstYear	First Year in 2021 and 2022 period to participate (takes value of 2021 or 2022)
Num_proj_lastyear	# of projects from the applicant company in [LastYear]
PriorApplications	Flag indicates if applicant submitted any applications prior to [FirstYear]
PGE_Flag	IF applicant participated in PG&E territory in [LastYear]
SCE_Flag	IF applicant participated in SCE territory in [LastYear]
SCG_Flag	IF applicant participated in SCG territory in [LastYear]
CSE_Flag	IF applicant participated in CSE (SDG&E) territory in [LastYear]
HomeOwner	1 if the applicant ONLY EVER had projects where the applicant is also the homeowner
3Step_Flag	Applicant within the 3-step process
LastStep	The farthest step an applicant ever got to on any project in the dataset {RRF, PPM, ICF, Payment}
RRF_Flag	Indicates whether applicant had any project that went through RRF in [LastYear]
PPM_Flag	Indicates whether applicant had any project that went through PPM in [LastYear]
ICF_Flag	Indicates whether applicant had any project that went through ICF in [LastYear]
PBI_Flag	1 if there are projects where applicant is currently in the PBI stage

Introduction

Thank you for taking the time to complete this survey for the Self Generation Incentive Program, from now on referred to as SGIP. We are surveying individuals who submitted SGIP applications in [PgmYear] to assess the performance of the SGIP Program Administrators.

Confirmation of Measure Volumes

[If PgmYear = “2021” or “2022” then ask M1a] [FORCE RESPONSE]

M1a. Our records show that [If HomeOwner = 0 then “your firm” else “you”] had active SGIP applications in [PgmYear], is that correct?

- 1 Yes
- 2 No

[If PgmYear = “2021 and 2022” then ask M1b] [FORCE RESPONSE]

M1b. Our records show that [If HomeOwner = 0 then “your firm” else “you”] had active SGIP applications in [PgmYear], is that correct?

- 1 Yes
- 2 No, we only had active applications in 2021
- 3 No, we only had active applications in 2022
- 4 No, we did not have any active applications in 2021 or 2022

IF M1a = No or M1b = 4 then DISPLAY TEXT BELOW AND THEN TERMINATE SURVEY

“This surveying effort is directed towards organizations who had active SGIP applications in [PgmYear]. Since your organization does not meet this criterion, we have no further questions for you. Thank you very much for your time and willingness to participate in this important study.”

If M1b = 2 then LastYear = 2021, If M1b = 3 then FirstYear = 2022

[ASK IF PriorApplications= 1]

M2. Our records show that [If HomeOwner = 0 then “your firm” else “you”] also had submitted applications in years prior to [FirstYear], is that correct? [FORCE RESPONSE]

- 1 Yes, applications were submitted in years prior to [FirstYear]
- 2 No, applications were not submitted prior to [FirstYear]
- 99 Don’t know

LastStepA. Our records show that the latest stage reached on any project application in [LastYear] was **<LASTSTEP>**. Is that correct? [FORCE RESPONSE]

- 1 Yes
- 2 No
- 99 Don’t know

[ASK IF LastStepA = No] [FORCE RESPONSE]

LastStepB. What was the latest stage reached on any project in [LastYear]? Was it ...

- 1 Submission of Reservation Request Form (RRF)
- 2 Submission of Proof of Project Milestone (PPM)
- 3 Submission of Incentive Claim Form (ICF)
- 4 Received First Payment
- 5 Received performance-based-incentives
- 6 Application Cancelled
- 7 Application placed on waitlist
- 99 Don’t know

Display: The following questions focus on your experience with the SGIP in [LastYear]. Please try to keep your answers focused on your experience in [LastYear] only, unless otherwise noted.

Application Issues, Prevention and Resolution

P1. In [LastYear], were you ever informed by a program administrator that an application was missing information or documentation? **[FORCE RESPONSE]**

- 1 Yes
- 2 No
- 99 Don't know

[ASK P2 if P1 = Yes, else skip to P3]

P2. What information were you told was missing? Select all that apply. **[MULTI-SELECT, Rotate 1-7]**

- 1 Signatures
- 2 Equipment Specifications
- 3 Warranty Specifications
- 4 Monitoring Plans
- 5 Meter Information
- 6 Eligibility Documentation for Equity
- 7 Eligibility Documentation for Resiliency
- 8 Other [RECORD, FORCE TEXT ENTRY IF CHOSEN]
- 99 Don't know [EXCLUSIVE]

P3. In [LastYear], were any of your applications suspended? **[FORCE RESPONSE]**

- 1 Yes
- 2 No
- 99 Don't know

[ASK P4 if P3 = Yes ELSE SKIP TO C1]

P4. Did you understand the reason why the application(s) were suspended?

- 1 Yes
- 2 No

P5. Did any of your suspended projects go on to become 'active' again in [LastYear]? **[FORCE RESPONSE]**

- 1 Yes, all of my suspended projects became active again
- 2 Yes, some (but not all) of my suspended projects became active again
- 3 No, none of my suspended projects became active again
- 99 Don't know

[ASK P6 if P5 in (2,3)]

P6. Why did the project(s) not become 'active' again? Select all that apply. **[Multi-select, ROTATE 1-4]**

- 1 Project was ineligible
- 2 Could not obtain the necessary project information
- 3 Timeline could not be met

- 4 Host Customer decided not to participate
- 5 Other [RECORD FORCE TEXT ENTRY IF CHOSEN]
- 99 Don't know [EXCLUSIVE]

[Ask P7 if P5 in (1,2) ELSE SKIP TO C1, show in a grid with a column for each PA the Applicant had submitted a project to]

P7_<PA>. Did a program administrator help you resolve a suspended project(s)?

- 1 Yes
- 2 No, but I *did not* need help resolving the suspension
- 3 No, but I needed help
- 4 N/A
- 99 Don't know

[Ask P8 if P7 in (1), Show in a grid with a column for each PA the Applicant had said yes to in P7]

P8_<PA>. On a scale of 1 to 5, where 1 is not at all satisfied and 5 is extremely satisfied, how satisfied were you with the program administrator's involvement in resolving suspended projects?

- 1 1 Not at all satisfied
- 2 2
- 3 3
- 4 4
- 5 5 Extremely Satisfied
- 98 N/A
- 99 Don't know

[ASK P9 if P8 < 3]

P9. Why were you unsatisfied with the program administrator's involvement in resolving suspended projects? If unsatisfied with more than one program administrator (PA), please specify the PA and the reasons for dissatisfaction.

- 1 Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 No comment

[If PgmYear = "2021 and 2022" ask P10]

P10_<PA>. Was the program administrator's involvement in resolving suspended projects in 2022 better, the same, or worse than in 2021?

- 1 Better in 2022
- 2 The Same in 2021 and 2022
- 3 Worse in 2022
- 4 N/A
- 99 Don't know

Clarity

C1. On an average project, how many clarifying questions or other inquiries did [If HomeOwner = 0 then “your firm”, else “you”] have in [LastYear] for the program administrator?

- 1 [RECORD #] Number of questions [FORCE NUMERICAL VALUE]
- 99 Don't know

[ASK IF C1 > 0, ELSE SKIP TO T4_<PA>]

C2. How did you contact program administrators regarding clarifying questions or other inquiries? Select all that apply. [multi-select]

- 1 Phone
- 2 Email
- 3 Workshops
- 4 Office Hours
- 5 Other [RECORD FORCE TEXT ENTRY IF CHOSEN]

C3. What would be your **preferred** method to contact program administrators? [(select ONE)]

- 1 Phone
- 2 Email
- 3 Workshops
- 4 Office Hours
- 5 [DISPLAY IF C2 = OTHER] C2 other free response
- 6 Other [RECORD FORCE TEXT ENTRY IF CHOSEN]

C4. In [LastYear], what types of questions have you asked program administrators? Select all that apply.

[Multi-select, Rotate 1-7] [FORCE RESPONSE]

- 1 Clarifications on the Application Process
- 2 Clarifications on the Application Technical Requirements
- 3 Clarifications on the Application Documentation Requirements
- 4 Clarifications on the Payment Process
- 5 Requests for Extensions or inquiries about Project Timelines
- 6 Clarifications on Program Eligibility
- 7 Clarifications on Program Structure
- 8 Other [RECORD FORCE TEXT ENTRY IF CHOSEN]
- 99 Don't know [EXCLUSIVE]

[ASK IF C4 = 6]

C5. What types of eligibility requirements did you need clarification on? Select all that apply.

- 1 Equity eligibility
- 2 Resiliency eligibility
- 3 General market eligibility

- 4 Other [RECORD FORCE TEXT ENTRY IF CHOSEN]
- 99 Don't know [EXCLUSIVE]

[ASK IF C5 = (1,2,3,4)]

C5a. What was unclear about the eligibility requirements?

- 1 Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 Don't Know

C6. Did a program administrator ever meet with you to go over common application issues to help move your project(s) through the application process? [FORCE RESPONSE]

- 1 Yes
- 2 No
- 99 Don't know

[ASK IF C6 = Yes]

C7. On a scale of 1 to 5, where 1 is not at all helpful and 5 is extremely helpful, how **helpful** was the information you discussed with the program administrator during that meeting?

- 1 1 Not at all helpful
- 2 2
- 3 3
- 4 4
- 5 5 Extremely helpful
- 99 Don't know

[ASK IF C7 < 3 or C7 =5]

C7a. Why did you provide that rating?

- 1 Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 No Comment

[ASK IF M1b = 1]

D1. How did the number of clarifying questions you asked in [LastYear] compare to prior years (on a per application basis)?

- 1 About the same number of questions in [LastYear] as in prior years
- 2 More questions in [LastYear]
- 3 Fewer questions in [LastYear]
- 99 Don't know

[ASK IF D1 = 2]

D1a. Why do you think there was an *increase* in the number of clarifying questions you had for the program administrator(s) in [LastYear] compared to previous years? Select all that apply. **[multi-select, Rotate 1-4]**

- 1 We submitted more applications in [LastYear] than in previous years
- 2 We submitted applications for new technologies or budget categories
- 3 The application process was more complicated than in prior years
- 4 Recent changes to SGIP rules were not clear
- 5 Other [RECORD FORCE TEXT ENTRY IF CHOSEN]
- 99 Don't know [EXCLUSIVE]

[ASK IF D1 = 3]

D1b. Why do you think there was a *decrease* in the number of clarifying questions you had for the program administrator(s) in [LastYear] compared to previous years? Select all that apply. **[multi-select, Rotate 1-6]**

- 1 We submitted less applications in [LastYear] than in previous years
- 2 We have a better understanding of the program rules than in previous years
- 3 We have more experience submitting SGIP applications
- 4 The SGIP Handbook is clearer than in the past
- 5 The program administrators took steps to proactively clarify or inform applicants about program changes
- 6 Meeting with a program administrator reduced the number of questions
- 7 Other [RECORD FORCE TEXT ENTRY IF CHOSEN]
- 99 Don't know [EXCLUSIVE]

Timeliness

[Matrix Column for PA T1_<PA> to T4_<PA> for each PA {PGE, SCE, SCG, CSE} where <PA>_Flag = 1]

T1_<PA>. On average in [LastYear], how long did it take for the program administrator to **initially reply to** clarifying questions and other inquiries?

- 1 Within one hour
- 2 Within one day
- 3 Within 3 days
- 4 Within 5 days
- 5 Within 10 days
- 6 More than 10 days
- 77 Not Applicable, there were no clarifying questions.
- 99 Don't know

T2_<PA>. In [LastYear], what is the longest amount of time the program administrator took to **initially reply to** an inquiry?

- 1 Within one hour
- 2 Within one day
- 3 Within 2 days
- 4 Within 3 days

- 5 Within 10 days
- 6 Within 3 weeks
- 7 Within a month
- 8 More than a month
- 77 N/A
- 99 Don't know

T3_<PA>. What is the longest amount of time the program administrator took to resolve an inquiry?

- 1 Within a day
- 2 Within a week
- 3 Within 2 weeks
- 4 Within a month
- 5 Within 3 months
- 6 3 to 6 months
- 7 6 to 12 months
- 8 More than a year
- 77 N/A
- 99 Don't know

[ASK IF T3_<PA> = {3,4,5,6,7,8}]

T3a_<PA>. How did <PA>'s timing to resolve the inquiry affect the project timeline?

- 1 Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 Don't Know

T4_<PA>. On a scale of 1 to 5, where 1 is not satisfied and 5 is extremely satisfied, how satisfied are you with the timeliness of the program administrator's communications?

- 1 1 Not at all satisfied
- 2 2
- 3 3
- 4 4
- 5 5 Extremely Satisfied
- 77 N/A
- 99 Don't know

[ASK IF T4_<PA> < 3]

T4a_<PA>. Why did you provide a rating of "<T4_PA>" for your satisfaction with <PA>'s timeliness of communication?

- 1 Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 No Comment

[If PgmYear = "2021 and 2022" ask T5]

T5. Was the program administrator’s timeliness of communications in 2022 better, the same, or worse than in 2021?

- 1 Better in 2022
- 2 The Same in 2021 and 2022
- 3 Worse in 2022
- 77 N/A
- 99 Don’t Know

Workshops and Office Hours

WK0. How [If HomeOwner = 0 then “does your firm” else “did you”] learn about changes made to the program, such as changes to incentive amounts, eligibility requirements, timelines, and deadlines?

Please select all that apply. **[multi-select, Rotate 1-8]**

- 1 Mail notifications
- 2 Updates to website
- 3 Email
- 4 Webinars
- 5 Quarterly workshops
- 6 SGIP Handbook
- 7 Update notifications in the application portal
- 8 Updates from other organizations
- 9 Other [RECORD VERBATIM [FORCE TEXT ENTRY IF CHOSEN]
- 99 Don’t Know [EXCLUSIVE]

WK1. How many of the SGIP quarterly workshops hosted by the program administrators did you attend in [LastYear]? **[FORCE RESPONSE]**

- 1 None
- 2 1
- 3 2
- 4 3
- 5 4
- 6 5 or more
- 99 Don’t Know [EXCLUSIVE]

[If WK1 = Don’t know, skip to OH1]

[If WK1 in 2-6 then ask WK2]

WK2. Why did you attend the quarterly workshop(s)? Select all that apply. **[multi-select, Rotate 1-6]**

- 1 To ask specific questions directly to program administrator(s)
- 2 To learn about changes to the program
- 3 To hear questions and answers from other applicants
- 4 To build a personal relationship with the program administrator
- 5 To learn general program information

- 6 To voice a concern or issue with the program administrator
- 7 Other [RECORD FORCE TEXT ENTRY IF CHOSEN]
- 99 Don't Know [EXCLUSIVE]

[If WK1 in 2-6 then ask WK3]

WK3. On a scale of 1 to 5, where 1 is not at all satisfied and 5 is extremely satisfied, how satisfied are you with the quarterly workshop(s) overall (including the format, information presented, and timing)?

- 1 1, Not at all satisfied
- 2 2
- 3 3
- 4 4
- 5 5, Extremely Satisfied
- 99 Don't Know

[ASK IF WK3<3]

WK3a. Why do you say that? If working with more than one program administrator (PA), please specify the PA you're discussing.

- 1 Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 No Comment

[If WK1 =1 then ask WK4]

WK4. Why didn't you attend any quarterly workshops? Select all that apply. **[multi-select, Rotate 1-4]**

- 1 I didn't know about them
- 2 I wanted to, but my schedule didn't allow me to attend
- 3 Others in my organization attended
- 4 I didn't think they were relevant to my role as an applicant
- 5 Other [RECORD FORCE TEXT ENTRY IF CHOSEN]
- 99 Don't Know [EXCLUSIVE]

[If PGE_Flag =1 or SCE_Flag =1 else skip to H1_<PA>] [FORCE RESPONSE]

OH1. Did you attend office hours hosted by [If PGE_Flag =1 & SCE_Flag =0 "PG&E"; else if PGE_Flag =0 & SCE_Flag =1 "SCE" ; else if PGE_Flag =1 & SCE_Flag =0 "PG&E or SCE"]?

- 1 Yes, I attended office hours hosted by **PG&E** [If PGE_Flag =1]
- 2 Yes, I attended office hours hosted by **SCE** [If SCE_Flag =1]
- 3 Yes, I attended office hours hosted by **PG&E and SCE** [If PGE_Flag =1 and SCE_Flag =1]
- 4 No, I did not attend office hours
- 99 Don't Know

[If OH1=(1,2,3)]

OH2. Why did you attend office hours? Please select all that apply.

- 1 To learn about changes to the program
- 2 To ask questions about application requirements

- 3 To get help resolving a suspended project
- 4 To ask questions about project technical requirements
- 5 Other [RECORD FORCE TEXT ENTRY IF CHOSEN]
- 99 Don't Know [EXCLUSIVE]

[If OH1=(4)]

OH3. Why did you not attend office hours? Please select all that apply.

- 1 I didn't know they were available
- 2 Office Hours never aligned with my schedule availability
- 3 I didn't have any questions to ask
- 4 Other [RECORD FORCE TEXT ENTRY IF CHOSEN]
- 99 Don't Know [EXCLUSIVE]

[IF OH1=(1,2,3)]

OH4. On a scale of 1 to 5, where 1 is not at all satisfied and 5 is extremely satisfied, how satisfied are you with your experience with office hours?

- 1 1, Not at all satisfied
- 2 2
- 3 3
- 4 4
- 5 5, Extremely Satisfied
- 99 Don't Know

[ASK IF OH4<3]

OH5. Why do you say that? If working with more than one program administrator (PA), please specify the PA you're discussing.

- 1 [RECORD VERBATIM] Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 No Comment

PA Helpfulness and Accessibility

[Column for each PA: H1_<PA> to H3_<PA> for each PA {PGE, SCE, SCG, CSE} where <PA>_Flag = 1]

[If PA = PG&E, SCE or SCG then display] “The next set of questions ask you to rate various aspects of your experience with the SGIP program administrator(s). When answering these questions, please think specifically about the program administrator’s role within SGIP, rather than as a utility in general.”

H1_<PA>. On a scale of 1 to 5, where 1 is not at all helpful and 5 is extremely helpful, how helpful was <PA> in [LastYear] in their role as the SGIP administrator?

- 1 1, Not at all helpful
- 2 2
- 3 3

- 4 4
- 5 5, Extremely helpful
- 99 Don't Know

[ASK IF H1_<PA> < 3]

H1a_<PA>. Why did you rate <PA> a “H1_<PA>” on their helpfulness as an SGIP administrator in [LastYear]?

- 1 Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 No Comment

H2_<PA>. On a scale of 1 to 5, where 1 is not at all accessible and 5 is very accessible, how accessible was <PA> in [LastYear] in their role as SGIP administrator?

- 1 1, Not at all accessible
- 2 2
- 3 3
- 4 4
- 5 5, Very accessible
- 99 Don't Know

[ASK IF H2_<PA> <3]

H2a_<PA>. Why do you rate <PA> a “H2_<PA>” on their accessibility as an SGIP administrator in [LastYear]?

- 1 Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 No Comment

H3_<PA>. On a scale of 1 to 5, where 1 is not at all satisfied and 5 is extremely satisfied, how would you rate your satisfaction with <PA> overall, in relation to their role as an SGIP administrator in [LastYear]?

- 1 1, Not at all satisfied
- 2 2
- 3 3
- 4 4
- 5 5, Extremely Satisfied
- 6 99 Don't Know

[ASK IF H3_<PA>=1 or 2]

H3a_<PA>. Why did you rate your satisfaction with <PA> as a “H3_<PA>” in relation to their role as an SGIP administrator in [LastYear]?

- 1 Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 No Comment

[ASK IF M2 = 1 or M1b = Yes, ELSE SKIP TO W1] [FORCE RESPONSE]

H4. How satisfied were you with the timeliness of the SGIP program administrator’s communications in [LastYear] in comparison to prior years? Were you...

- 1 More Satisfied in [LastYear]
- 2 Less Satisfied in [LastYear]
- 3 No Change
- 4 I did not submit any applications prior to [LastYear]
- 99 Don't Know

[ASK IF H4 = 1 or 2]

H4a. Why do you say that? If working with more than one program administrator (PA), please specify the PA you're discussing..

- 1 Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 No Comment

[ASK IF H4 <> 4, ELSE SKIP TO W1]

H5. How **helpful** were the SGIP program administrators in [LastYear] in comparison to prior years? Were they...

- 1 More Helpful in [LastYear]
- 2 Less Helpful in [LastYear]
- 3 No Change
- 99 Don't Know

[ASK IF H5 = 1 or 2]

H5a. Why do you say that? If working with more than one program administrator (PA), please specify the PA you're discussing.

- 1 Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 No Comment

[ASK IF H4 <> 4, ELSE SKIP TO W1]

H6. How **accessible** were the SGIP program administrators in [LastYear] in comparison to prior years? Were they ...

- 1 More accessible in [LastYear]
- 2 Less accessible in [LastYear]
- 3 No Change
- 99 Don't Know

[ASK IF H6 = 1 or 2]

H6a. Why do you say that? If working with more than one program administrator (PA), please specify the PA you're discussing..

- 1 [RECORD VERBATIM] Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 No Comment

[ASK IF H4 <> 4, ELSE SKIP TO W1]

H7. How satisfied are you with your experience with the SGIP program administrator(s) overall performance since the beginning of [LastYear], in comparison to prior years? Are you...

- 1 More satisfied in [LastYear]
- 2 Less satisfied in [LastYear]
- 3 No Change
- 99 Don't Know

[ASK IF H7 = 1 or 2]

H7a. Why do you say that? If working with more than one program administrator (PA), please specify the PA you're discussing.

- 1 Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 No Comment

Website

DISPLAY ABOVE W1: The next set of questions relate to your experiences with the SGIP websites maintained by the CPUC and the program administrators.

W1. Which of the following SGIP related websites did you visit in [LastYear]? **[FORCE RESPONSE]**

- 1 The CPUC's SGIP application portal www.selfgenca.com
- 2 PG&E's SGIP website
- 3 SCE's SGIP website
- 4 SCG's SGIP website
- 5 CSE's SGIP website
- 6 I did not visit any SGIP websites in [LastYear] [EXCLUSIVE, SKIP TO K1 IF SELECTED]
- 99 Don't Know [EXCLUSIVE, SKIP TO K1 IF SELECTED]

[Column for each answer of W1: 1-CPUC 2-PGE 3-SCE 4-SCG 5-CSE]

W2_[#]. Generally, why did you visit the SGIP website of the program administrator? Please select all that apply. **[Multi-select, Rotate 1-8]**

- 1 To submit project application forms
- 2 To check project status
- 3 To use the generation or storage calculators
- 4 To get the SGIP Handbook
- 5 To get information about quarterly workshops
- 6 To learn more about the SGIP (through FAQs & summarized info)
- 7 To access CPUC Rulings related to SGIP
- 8 To learn about SGIP-step openings or status
- 9 Other [RECORD VERBATIM]
- 99 Don't Know [EXCLUSIVE]

[DISPLAY IF W2 OTHER COUNT >= 1]

W2a. What were the other reason(s) for visiting the program administrators' SGIP website?
[OPEN ENDED]

W3_<#>. How frequently do you visit the SGIP program administrator website(s) ?

- 1 Every day
- 2 A few times a week
- 3 Once a week
- 4 Once a month
- 5 Once a year
- 99 Don't Know

W4_<#>. On a scale of 1 to 5, where 1 means not at all useful, and 5 means extremely useful, how useful is the program administrator's SGIP website?

- 1 1 Not at all useful
- 2 2
- 3 3
- 4 4
- 5 5 Extremely useful
- 98 N/A
- 99 Don't Know

[ASK IF W4_<#> = {1,2, 5}]

W4a_<#>. Why did you rate <PA>'s website a <W4_PA>?

- 1 Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 Don't Know

Satisfaction

DISPLAY ABOVE K1: For the following questions please rate your satisfaction with various aspects of the SGIP on a 1 to 5 scale, where 1 is not at all satisfied and 5 is extremely satisfied.

[ASK IF RRF_flag = 1 AND Num_proj_lastyear >0]

K1. How satisfied were you with the application submission process in [LastYear]?

- 1 1, Not at all satisfied
- 2 2
- 3 3
- 4 4
- 5 5, Extremely satisfied
- 99 Don't Know

[ASK IF K1 = (1,2)]

K1a. Why were you [if K3 <3 "unsatisfied"] with the application submission process??

- 1 Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 No Comment

[ASK IF (PPM_flag =1 AND (LastStep = {PPM, ICF, Payment} OR LastStepb = 2,3,4,5))] AND 3Step_flag = 1 ELSE SKIP TO K4]

K3. How satisfied were you with the paperwork requirements for the proof of project milestone in [LastYear]? **[FORCE RESPONSE]**

- 1 [RECORD 1 to 5]
- 99 Don't Know

[ASK IF K3 = (1,2)]

K3a. Why were you [if K3 <3 "unsatisfied"] with the paperwork requirements for the proof of project milestone?

- 1 Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 No comment

[ASK IF (ICF_flag = 1 AND (LastStep = {ICF, Payment} OR LastStepb = {3,4,5}), ELSE SKIP TO K9) [FORCE RESPONSE]

K4. How satisfied were you with the paperwork requirements for the incentive claim stage in [LastYear]?

- 1 [RECORD 1 to 5]
- 99 Don't Know

[ASK IF K4 = (1,2)]

K4a. Why were you [if K4 <3 "unsatisfied" else if K4=5 "satisfied"] with paperwork requirements for the incentive claim stage?

- 1 Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 No comment

K5. How satisfied were you with the inspection scheduling process in [LastYear]?

- 1 [RECORD 1 to 5]
- 77 No inspections have been scheduled
- 99 Don't Know

[ASK IF K5 = (1,2)]

K5a. Why were you [if K5 <3 "unsatisfied" else if K5=5 "satisfied"] with the inspection scheduling process?

- 1 Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 No comment

[ASK IF LastStep = Payment OR LastStepb = {4,5}, ELSE SKIP TO K9] [FORCE RESPONSE]

K6. How satisfied were you with the time it takes to receive the upfront-incentive in [LastYear]?

- 1 [RECORD 1 to 5]

- 77 No upfront incentives have been received
- 99 Don't Know

[ASK IF = (1,2)]

K6a. Why were you [if K6 <3 “unsatisfied” else if K6=5 “satisfied”] with the time it takes to receive the upfront-incentive?

- 1 Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 No comment

[ASK IF (PBI_Flag = 1 OR LastStepb = 5), ELSE SKIP TO K9] [FORCE RESPONSE]

K7. How satisfied are you with the Performance-Based Incentive payment process in [LastYear]?

- 1 [RECORD 1 to 5]
- 99 Don't Know

[ASK IF K7 = (1 ,2)]

K7a. Why were you [if K7 <3 “unsatisfied” else if K7=5 “satisfied”] with the Performance-Based Incentive payment process?

- 1 Please record your thoughts below [FORCE TEXT ENTRY IF CHOSEN]
- 99 No comment

K9. In your opinion, how can the SGIP be improved going forward?

- 1 Please record your thoughts below
- 99 No comment

Investment Tax Credit

ITC1: Did your organization receive any guidance related to claiming the Federal Investment Tax Credit (ITC) in conjunction with the SGIP incentive?

- 1 Yes
- 2 No, we filed for the Federal Investment Tax Credit but did not receive any guidance related to claiming the ITC
- 3 No, we did not file for the Federal Investment Tax Credit (ITC)
- 99 Don't Know

[IF ITC1= 1 ASK ITC2]

ITC2: What guidance was provided and from whom?

Guidance: [OPEN END]

From whom: [OPEN END]

ITC3: What cost basis do you use [if HomeOwner =0 then “or do you advise your customers to use,”] when claiming the Federal Investment Tax Credit (ITC)?

- 1 Full cost of the system
- 2 Partial cost of the system net the SGIP incentive
- 3 [if HomeOwner = 1] Not planning to claim ITC

- 4 [if HomeOwner = 0] Did not advise customers on cost basis
- 5 Other [Open End FORCE TEXT ENTRY IF CHOSEN]
- 6 Don't Know

ITC0: Have you claimed the Federal Investment Tax Credit (ITC) for an SGIP project?[FORCE RESPONSE]

- 1 Yes
- 2 No
- 99 Don't Know

[IF ITC0= 1 ASK ITC4]

ITC4: Did you receive the expected Federal Investment Tax Credit (ITC)?

- 1 Yes
- 2 No, I received a larger Federal Investment Tax Credit (ITC) than expected
- 3 No, I received smaller Federal Investment Tax Credit (ITC) than expected
- 99 Don't Know

Those are all of the questions we have for you at this time. Thank you very much for your participation in this survey.

A.3 Host Customer Survey Instrument

SURVEY INPUT VARIABLES

Variable	Description
HouseFlag	Flag indicates whether host customer is a homeowner (1) vs. an organization (0)
Company_Name	If Nonresidential: Name of the Host Customer's Company If Residential: N/A
Application_Yrs	App Year: [2012,2013,2014,2015,2016, 2017, 2018,2019,2020, 2021, 2022] (Written as "y1, y2, ..., and yn")
PgmYear	2021, 2022, or 2021 and 2022
LastYear	Most recent year of participation
onlyHost	1 if the host customer is EVER only the host customer
ApplicantNoSelf_and_list	Name of the Applicant Company Associated with the Host Customer, separated by "and" (excludes applicants that are the same as the host customer)
ApplicantNoSelf_or_list	Name of the Applicant Company Associated with the Host Customer, separated by "or" (excludes applicants that are the same as the host customer)
Tech_and_list	List of technologies, separated by "and"
PA_or_list	List of program administrators for the host customer, separated by "or"
PA_and_list	List of program administrators for the host customer, separated by "and"
PGE_Flag	IF host customer participated in PGE territory
CSE_Flag	IF host customer participated in CSE territory
SCG_Flag	IF host customer participated in SCG territory
SCE_Flag	IF host customer participated in SCE territory
StorageFlag	Flag indicates whether technology was Battery Storage
Gen_flag	Flag indicates whether technology was generation (i.e., all technologies that are not Battery storage)
GenMeasure	Equipment type for generation measures
BatteryManufacturer	Equipment Manufacturer in the SGIP database
InspectionFlag	Indicates if Host Customer got to Inspection Step in 2021 or 2022
Payment_Flag	Indicates if host customer reached payment stage in 2021 or 2022
PBI_Flag	Indicates if host customer reached PBI stage in 2021 or 2022
InspectionYear	The year of inspection (2021 or 2022)
PaymentYear	The year in which payment was reached (2021 or 2022)
PBIYear	The most recent PBI Year (2021 or 2022)
Tech_and_list_a1	Tech_and_list with correct grammar for A1

Thank you for agreeing to take this survey regarding your experience with California's Self-Generation Incentive Program (SGIP).

[IF HouseFlag = 0 THEN DISPLAY: "Throughout this survey, we will be referencing the <Tech_and_list> project(s) your organization, <Company_Name>, applied for in <Application_Yrs>.]

[IF HouseFlag = 1 THEN DISPLAY: "Throughout this survey, we will be referencing the <Tech_and_list> project(s) you applied for in <Application_Yrs> for your home.]

Background

A1. Our records shows that you [IF OnlyHost = 1 THEN “, or (<ApplicantNoSelf_or_list >) on your behalf,”] applied for an incentive in <PgmYear> from California’s Self-Generation Incentive Program (SGIP) for <Tech_and_list_a1> to be installed at your [IF HouseFlag = 1 “home”, IF HouseFlag = 0 “organization’s facility”. Is this correct? [FORCE RESPONSE]

- 1 Yes
- 2 No

[IF A1 = No, DISPLAY TEXT BELOW THEN TERMINATE SURVEY]

This surveying effort is directed towards those who had active SGIP applications [PgmYear]. Since you do not meet this criterion, we have no further questions for you. Thank you very much for your time and willingness to participate in this important study.

[ASK IF HouseFlag = 1 and <Tech_and_list> not equal to “Internal Combustion Engine” AND OTHERS???
]

A2. Was this <Tech_and_list> intended for use at your home? [FORCE RESPONSE]

- 1 Yes, for use at my home or the home of a family member
- 2 No, for use at a customer’s home
- 3 No, for use at my company’s facility (which is not a home)
- 99 Don't know

[ASK IF HouseFlag = 0]

A3. Was this <Tech_and_list> intended for use at your company’s facility or at a customer’s home? [FORCE RESPONSE]

- 1 Yes, for use at a customer’s home
- 2 Yes, for use at a company facility
- 3 No, for use at my home or the home of a family member
- 99 Don't know

[UPDATE HouseFlag for the remainder of the survey:

IF A2 = 1 THEN HouseFlag = 1
IF A2 = 2 or 3 THEN HouseFlag = 0
IF A3 = 3 THEN HouseFlag = 1
IF A3 = 1 or 2 THEN HouseFlag = 0]

A4. How did you first learn about the Self-Generation Incentive Program (SGIP)? **[Rotate 1-8]**

- 1 Through < ApplicantNoSelf_or_list >
- 2 I received an email from my utility
- 3 I received information in the mail from my utility
- 4 Online research
- 5 Family and friends (word of mouth)
- 6 Though a vendor or installer

- 7 Through a community organization
- 8 **[If HouseFlag = 0]** My utility account representative informed me
- 9 I was not aware of SGIP before taking this survey
- 10 Other **[RECORD]** **[FORCE RESPONSE]**
- 99 Don't know

[ASK IF Gen_flag = 1]

A5_gen. What motivated you to install the [GenMeasure] at your **[If HouseFlag = 1 THEN “home” else “organization”]**? Select all that apply. **[Multi-select, rotate 1-8]**

- 1 **[If HouseFlag = 1]** To save money on my home’s electric bill
- 2 **[If HouseFlag = 0]** To save money on my company’s electric bill
- 3 To become less grid-dependent
- 4 To reduce global greenhouse gas emissions
- 5 **[If HouseFlag = 0]** To satisfy corporate goals or initiatives regarding on-site electricity generation
- 6 To increase the reliability and resiliency of our electricity supply
- 7 **[If HouseFlag = 1]** To increase the value of my home
- 8 **[If HouseFlag = 0]** To increase the value of my organization
- 9 Other **[RECORD]** **[FORCE RESPONSE]**
- 99 Don't know **[EXCLUSIVE]**

[ASK IF StorageFlag = 1]

A5_Stor. What motivated you to install the incentivized battery storage system? Select all that apply. **[Multi-select, rotate 1-13]**

- 1 **[If HouseFlag = 1]** To save money on my home’s electric bill
- 2 **[If HouseFlag = 0]** To save money on my company’s electric bill
- 3 To become less grid-dependent
- 4 To reduce greenhouse gas emissions
- 5 **[If HouseFlag = 0]** To satisfy corporate goals or initiatives regarding on-site electricity generation
- 6 To improve the functionality of existing onsite solar PV or other renewable generation system
- 7 To justify a future solar PV or other renewable generation investment
- 8 To use as backup in the event of a grid outage
- 9 To use as backup in case of a Public Safety Power Shutoff (PSPS) event during times of high wildfire risk
- 10 Because of the incentives
- 11 To help with EV Charging
- 12 **[If HouseFlag = 1]** To increase the value of my home
- 13 **[If HouseFlag = 0]** To increase the value of my organization

- 14 Other [RECORD] [FORCE RESPONSE]
- 99 Don't know [EXCLUSIVE]

Communication

[C1_<PA> through C2_<PA> contains logic relating to each PA [PGE, SCE, SCG, CSE] where <PA>_Flag = 1]

[ASK C1 once, and show a column to respond to C1 for each <PA>]

C1_<PA>. In [LastYear], through what channels did you hear from <PA_or_List> regarding the status SGIP application(s)? Select all that apply. [Multi-select, rotate 1-5] [FORCE RESPONSE]

- 1 Email
- 2 Postal mail
- 3 Phone
- 4 Through “Check My Application Status” on selfgenca.com
- 5 Quarterly workshop
- 6 Other channel
- 98 I never heard from <PA> regarding my application [EXCLUSIVE]
- 99 Don't know [EXCLUSIVE]

[IF C1_<PA> OTHER COUNT >= 1 CHOSEN]

C1_Other. What were the other channels that you heard from <PA_or_List> regarding the status of your SGIP application(s)?

- 1. Please record your thoughts below [FORCE RESPONSE]
- 99. No Comment

[Show a column to respond to C2a_<PA> through C2e_<PA> for each <PA>]

C2_<PA>. On a scale of 1 to 5, where 1 is not at all clear and 5 is extremely clear, how clear were the following program aspects communicated to you by the program administrator in [LastYear]?

- C2a_<PA>. The program eligibility requirements [1-5, N/A, Don't know]
- C2b_<PA>. The project documentation requirements [1-5, N/A, Don't know]
- C2c_<PA>. The program timeline [1-5, N/A, Don't know]
- C2d_<PA>. SGIP application status [1-5, N/A, Don't know]
- C2e_<PA>. [IF OnlyHost = 1] The division of responsibility between me and <ApplicantNoSelf_or_list > [1-5, N/A, Don't know]

[ASK IF C2a_<PA> = 1 or 2, for ANY PA]

C2a_ Explain. What was unclear about the SGIP program eligibility requirements? Select all that apply.

[MULTI-SELECT, rotate 1-3]

- 1 The equity eligibility requirements were unclear
- 2 The resiliency eligibility requirements were unclear
- 3 Other program eligibility requirements were unclear
- 4 I was not involved with the program eligibility requirements
- 5 Other [RECORD] [FORCE RESPONSE]
- 99 Don't know [EXCLUSIVE]

[ASK IF C2b_<PA> = 1 or 2, for ANY PA]

C2b_ Explain. What was unclear about the SGIP **project documentation requirements**? Select all that apply. **[MULTI-SELECT, rotate 1-5]**

- 1 Documentation requirements were too technical
- 2 It was unclear what information was needed
- 3 Documentation requirements kept changing based on correspondence with <PA_or_list>
- 4 [IF **OnlyHost = 1**] Documentation requirements kept changing based on correspondence with <ApplicantNoSelf_or_list>
- 5 [IF **OnlyHost = 1**] I received conflicting information from <PA_or_list> and <Applicant_or_list> regarding project documentation requirements
- 6 I was not involved with project documentation requirements
- 7 Other [RECORD] [FORCE RESPONSE]
- 99 Don't know [EXCLUSIVE]

[ASK IF C2c_<PA> = 1 or 2, for ANY PA]

C2c_ Explain. What was unclear about the SGIP **program timelines**? Select all that apply. **[MULTI-SELECT, rotate 1-7]**

- 1 I was not informed of a timeline to receive the SGIP incentive
- 2 The timeline to receive the SGIP incentive kept changing
- 3 Estimated timeline to receive the SGIP incentive was missed
- 4 [IF **OnlyHost = 1**] There were long lapses in communication from <ApplicantNoSelf_or_list>
- 5 There were long lapses in communication from <PA_or_list>
- 6 [IF **OnlyHost = 1**] Upon request, <ApplicantNoSelf_or_list> was not able to give a timeline to receive incentive
- 7 Upon request, <PA_or_list> was not able to give a timeline to receive incentive
- 8 Other [RECORD] [FORCE RESPONSE]
- 99 Don't know [EXCLUSIVE]

[ASK IF C2d_<PA> = 1 or 2, for ANY PA]

C2d_ Explain. What was unclear about the **status of your SGIP application(s)**? Select all that apply. **[MULTI-SELECT, rotate 1-6]**

- 1 I could not determine the status of my SGIP application(s)
- 2 There were long periods of time with no status updates
- 3 I didn't know why my application was not moving to the next step
- 4 I didn't know when my application would move to the next step
- 5 I didn't know how to check the status of my application
- 6 It was unclear why the application entered a particular status
- 7 I did not request the status of my SGIP application(s)
- 8 Other [RECORD] [FORCE RESPONSE]

99 Don't know [EXCLUSIVE]

[ASK IF C2e_<PA> = 1 or 2, for ANY PA]

C2e_ Explain. What was unclear about the **division of responsibility between you and < ApplicantNoSelf_or_list>**? Select all that apply. **[MULTI-SELECT]**

- 1 I thought <ApplicantNoSelf_or_list> would handle MORE SGIP responsibilities
- 2 It was unclear who was supposed to respond to SGIP communications: myself or <ApplicantNoSelf_or_list>
- 3 Other [RECORD] [FORCE RESPONSE]
- 99 Don't know [EXCLUSIVE]

[ASK IF StorageFlag =1 & HouseFlag=1 ELSE SKIP TO E1]

C3. Some residential customers with recent SGIP storage projects are required to enroll in SGIP-approved electricity rates. Are you aware of this requirement?

- 1 Yes
- 2 No

[ASK IF C3='Yes', ELSE SKIP TO E1]

C4. Did either <PA_or_list> or <ApplicantNoSelf_or_list> notify you of the requirement to enroll in SGIP-approved electricity rates? Select all that apply. **[MULTI-SELECT]**

- 1 <PA_or_list>
- 2 <ApplicantNoSelf_or_list>
- 99 Don't know [EXCLUSIVE]

C5. On a scale of 1 to 5, where 1 is very poor and 5 is excellent, how would you rate your understanding of the potential impact an SGIP-approved electricity rate could have on your electricity bill?

- 1 1 – Very Poor Understanding
- 2 2
- 3 3
- 4 4
- 5 5 – Excellent Understanding

Website

E1. Please select which of the following websites you visited: **[MULTI-SELECT] [FORCE RESPONSE]**

- 1 SelfGenCA.com
- 2 PGE.com/SGIP
- 3 EnergyCenter.org/SGIP
- 4 SCE.com/SGIP
- 5 SoCalGas.com/for-your-business/power-generation/self-generation-incentive
- 6 None of the above [EXCLUSIVE ANSWER]

[ASK IF SELECTED AT LEAST ONE CHOICE FROM E1, ELSE SKIP TO H1]

E2. Why did you visit these websites? [SELECT MULTIPLE, Rotate 1-8]

- 1 To learn more about the program structure (through FAQs & summarized info)
- 2 Links to SGIP Handbook
- 3 To check project status
- 4 To submit project application forms
- 5 To review online SGIP status reports
- 6 Links to CPUC rulings related to SGIP
- 7 To use generation or storage calculators
- 8 To learn about quarterly workshops schedules/location
- 9 Other [RECORD] [FORCE RESPONSE]
- 99 Don't know

[FOR E3 - MAKE A TABLE WITH A ROW FOR EACH WEBSITE SELECTED IN E1]

E3. On a scale of 1 to 5, where 1 means Not at all Useful, and 5 means Extremely Useful, how would you rate the following website(s) in terms of their usefulness?

- SelfGenCA.com [RECORD 1-5, N/A]
- PGE.com/SGIP [RECORD 1-5, N/A]
- EnergyCenter.org/SGIP [RECORD 1-5, N/A]
- SCE.com/SGIP [RECORD 1-5, N/A]
- SoCalGas.com/for-your-business/power-generation/self-generation-incentive [RECORD 1-5, N/A]

Satisfaction

[FOR H1a Through H1f, show in a table which allows for selection of: [1-5, N/A, Don't know]]

[Show table for each PA [PGE, SCE, SCG, CSE] where <PA>_Flag = 1]

H1_<PA>. On a scale of 1 to 5, where 1 is not at all satisfied and 5 is extremely satisfied, how satisfied were you in [LastYear] with <PA> concerning: [1-5, N/A, Don't know]

H1a_<PA>. [ASK IF InspectionFlag = 1] The inspection scheduling process

H1b_<PA>. [ASK IF PAYMENT_FLAG = 1] The time it takes to receive the upfront incentive

H1c_<PA>. [ASK IF PBI_FLAG = 1] The performance-based incentive payment process

H1d_<PA>. [ASK IF C1 <> 98,99] Communications from <PA> regarding SGIP

H1e_<PA>. [ASK IF OnlyHost=1] Communications from <ApplicantNoSelf_and_list> regarding SGIP

H1f_<PA>. Your experience with <PA> in relation to the SGIP

[ASK IF H1a_<PA> = 1 or 2, for ANY PA]

H1_Explain. Why were you unsatisfied with the inspection scheduling process? [OPEN END]

[ASK IF H1c_<PA> = 1 or 2, for ANY PA]

H1c_ Explain. Why were you unsatisfied with the **performance-based incentive payment process**?
[OPEN END]

[ASK IF H1d_<PA> = 1 or 2, for ANY PA]

H1d_ Explain. Why were you unsatisfied with the **communications from your program administrator (PA) regarding SGIP**? Select all that apply. **[MULTI-SELECT, Rotate 1-5]**

- 1 I did not receive enough information
- 2 Written communications did not provide clear information
- 3 Written communications were too infrequent
- 4 The language used in communications was confusing
- 5 I did not know what to do upon receiving certain communications
- 6 I did not receive any communication from <PA>
- 7 Other [OPEN]
- 99 Don't know [EXCLUSIVE]

[ASK IF H1e_<PA> = 1 or 2, for ANY PA]

H1e_ Explain. Why were you unsatisfied with the **communication provided by <ApplicantNoSelf_and_list> (the applicant)**? Select all that apply. **[MULTI-SELECT, Rotate 1-7]**

- 1 Applicant did not provide enough information throughout the SGIP process
- 2 There were communication issues due to Applicant's business closure or bankruptcy
- 3 There were communication issues due to Applicant's organizational structure
- 4 Applicant was not well informed about the SGIP process
- 5 Applicant made an error in the SGIP application or documentation
- 6 Applicant poorly explained the role of the SGIP incentive within my entire contract with their company
- 7 Applicant poorly explained the SGIP system operation requirements prior to my participation
- 8 I don't recall receiving any information from the Applicant regarding the SGIP
- 9 Other [OPEN]
- 99 Don't know [EXCLUSIVE]

[ASK IF H1f_<PA> = 1 or 2, for ANY PA]

H1f_ Explain. Why were you unsatisfied with **your experience with <PA_and_List> in relation to the SGIP**? [OPEN END]

H7. If your SGIP incentivized technology has been installed, please rate on a scale of 1 to 5, where 1 is not at all satisfied and 5 is extremely satisfied, how satisfied you are with the incentivized technology?
[1-5, the SGIP incentivized technology has not yet been installed, Don't know]

[ASK IF H7 = 1 or 2]

H7_ Explain. Why were you unsatisfied with your SGIP incentivized technology? [OPEN END]

Process

[B1_<PA> through B6_<PA> contains logic relating to each PA [PGE, SCE, SCG, CSE] where <PA>_Flag = 1]

[ASK B1 once, and show a column to respond to B1 for each <PA>]

B1_<PA>. In [LastYear], did you experience any SGIP issues, problems, or delays (e.g., delays or problems with SGIP application(s) or incentive processing)? [FORCE RESPONSE]

- 9 Yes
- 10 No
- 99 Don't know

[ASK B2 once, and show a column to respond to B2 for each <PA>]

[IF B1_<PA> = 'Yes' ASK B2_<PA>, ELSE SKIP TO P1]

B2_<PA>. What issues, problems, or delays did you experience? Select all that apply. [MULTI-SELECT, Rotate 1-6] [FORCE RESPONSE]

- 1 Delay in SGIP application
- 2 Problem with SGIP application
- 3 Delay in receiving the SGIP incentive
- 4 Delay in system activation
- 5 Problem with the system
- 6 My developer/installer went out of business
- 7 Other [OPEN END]
- 99 Don't know [EXCLUSIVE]

[IF B2_<PA> OTHER COUNT >=1]

B2_Other. What were the other issues, problems, or delays you experienced?

- 99. Please record your thoughts below [FORCE RESPONSE]No Comment

B3. Who helped you work through any issues, problems, or delays [MULTI-SELECT]?

- 1 [IF PGE_Flag = 1 and B1_PGE = 'Yes'] PG&E
- 2 [IF CSE_Flag = 1 and B1_CSE = 'Yes'] CSE
- 3 [IF SCG_Flag = 1 and B1_SCG = 'Yes'] SCG
- 4 [IF SCE_Flag = 1 and B1_SCE = 'Yes'] SCE
- 5 [IF OnlyHost = 1] < ApplicantNoSelf_or_list >
- 6 Other [OPEN] [FORCE RESPONSE]

[ASK B5 once, and show a column to respond to B5 for each <PA> where B1_<PA> = 'Yes']

B5_<PA>. Were your issues, problems, or delays resolved? [FORCE RESPONSE]

- 1 Yes
- 2 No
- 3 Some Yes, Some No

99 Don't know

[ASK IF B5_<PA> = 1 or 3]

B6_<PA>. With PA, How quickly were your issues, problems, or delays resolved?

- 1 Within one hour
- 2 Within one day
- 3 Within two days
- 4 Within three days
- 5 Within one week
- 6 Within two weeks
- 7 Within one month
- 8 More than one month
- 99 Don't know

[ASK IF ANY B2_<PA> = 'A developer/installer I was working with went out of business']

B7. Please describe what happened when the developer/installer you were working with went out of business. How was this resolved? Did <PA_or_list> help you? [OPEN END]

Compare to Prior Years

[ASK IF PgmYear = "2021 and 2022"]

P1. How satisfied are you with your experience with SGIP in [LastYear], in comparison to prior years?

- 1 More satisfied in [LastYear]
- 2 Less satisfied in [LastYear]
- 3 No Change
- 4 Didn't participate in SGIP prior to [LastYear]
- 99 Don't know

[ASK IF P1 = 1]

P1a. Why were you more satisfied with your SGIP experience in [LastYear] than in prior years? Select all that apply. [MULTI-SELECT, Rotate 1-4]

- 1 The application process was easier
- 2 I understand the SGIP better
- 3 I used a different applicant company and they were more helpful
- 4 I received my SGIP incentive faster
- 5 Other [OPEN] [FORCE RESPONSE]
- 99 Don't know [EXCLUSIVE]

[ASK IF P1 = 2]

P1b. Why were you less satisfied with your SGIP experience in [LastYear] than in prior years? Select all that apply. [MULTI-SELECT, Rotate 1-4]

- 1 The application process was more confusing

- 2 Program requirements changed frequently in [LastYear]
- 3 I used a different applicant company, and I was unsatisfied with the experience
- 4 It took longer to receive the SGIP incentive than in past years
- 5 Other [OPEN] [FORCE RESPONSE]
- 99 Don't know [EXCLUSIVE]

Investment Tax Credit (ITC)

ITC1: Did you receive any guidance related to claiming the Federal Investment Tax Credit (ITC) in conjunction with the SGIP incentive? [FORCE RESPONSE]

- 1 Yes
- 100 No/Don't know

[IF ITC1= 1 ASK ITC2]

ITC2: What guidance was provided and from whom?

Guidance: [OPEN END]

From whom: [OPEN END]

ITC0: Did you or your developer claim the Federal Investment Tax Credit (ITC)? [FORCE RESPONSE]

- 1 Yes, I applied for the ITC
- 2 Yes, my developer applied for the ITC
- 3 No
- 99 Don't know

[IF ITC0= 1else skip to Perf0]

ITC3: What cost basis did you use when claiming the Federal Investment Tax Credit (ITC)?

- 7 Full cost of the system
- 8 Partial cost of the system net the SGIP incentive
- 9 Other [Open End] [FORCE RESPONSE]
- 99 Don't know

ITC4: Did you receive the expected Federal Investment Tax Credit (ITC)?

- 4 Yes
- 5 No, I received a larger Federal Investment Tax Credit (ITC) than expected
- 6 No, I received smaller Federal Investment Tax Credit (ITC) than expected
- 7 Don't know

System Performance

Perf0. What was the longest electricity outage experienced since the installation of your SGIP technology? [FORCE RESPONSE]

- 1 No outage experienced
- 2 Less than an hour
- 3 1 to 6 hours
- 4 > 6 to 24 hours
- 5 > 24 to less than 48 hours
- 6 48 hours to one week
- 7 Longer than one week
- 99 Don't know

[IF Perf0 <> 1,99]

Perf0a. Was the last outage you experienced planned?

- 1 Yes, it was a planned outage by my electricity provider
- 2 No, this was an unexpected outage
- 99 Don't know

[IF StorageFlag =1 then ASK Perf1-Perf5]

Perf1. [ASK IF Perf0 in (,3,4,5,6,7)] Have you used your battery storage to provide backup power during an outage lasting longer than one hour? [FORCE RESPONSE]

- 1 Yes
- 2 No
- 99 Don't know

Perf2Res. [Ask If Houseflag =1] Is your battery storage system designed to provide electricity to your whole house, or to a portion of your house during an outage?

- 1 Whole house
- 2 Portion of your house
- 99 Don't know

Perf2NonRes. [Ask If Houseflag =0] Is the battery storage system designed to provide electricity to your whole facility, or to a portion of your facility during an outage?

- 1 Whole facility
- 2 Portion of your facility
- 99 Don't know

Perf3. Do you have control over the end uses (HVAC, refrigerator, plug loads, etc.) and/or circuits your battery provides power to during an outage?

- 1 I have no control over which end uses or circuits are provided power during an outage.

- 2 Yes, I can **manually control** which end uses and/or circuits are energized during an outage at the electrical panel or sub-panel.
- 3 Yes, I can control which end uses and/or circuits are energized during an outage **using an app**.
- 4 Other [Open End] [FORCE RESPONSE]
- 99 Don't know

Perf4. Does your level of controllability of the battery storage system meet your expectations?

- 1 Yes
- 2 No
- 99 Don't know

Perf5: [ASK IF Perf1=1] How satisfied are you, where 1 is not at all satisfied and 5 is extremely satisfied with **the performance of the battery storage system** during an outage?) **[1-5, Don't know]**

Perf5 Explain: [ASK IF Perf5 < 3] Why were you not satisfied with your systems performance?
[OPEN END]

[IF GenFlag =1 then ASK Perf6-Perf10]

Perf6. [ASK IF Perf0 in (,3,4,5,6,7)] Have you used your generation technology to provide backup power during an outage lasting longer than one hour?

- 3 Yes
- 4 No
- 99 Don't know

Perf7Res. [Ask If Houseflag =1] Is your generation technology designed to provide electricity to your whole house, or to a portion of your house during an outage?

- 3 Whole house
- 4 Portion of your house
- 99 Don't know

Perf7NonRes. [Ask If Houseflag =0] Is the generation technology designed to provide electricity to your whole facility, or to a portion of your facility during an outage?

- 3 Whole facility
- 4 Portion of your facility
- 99 Don't know

Perf10: [ASK IF Perf6=Yes] How satisfied are you, where 1 is not at all satisfied and 5 is extremely satisfied, with **the performance of the generation technology** during an outage? **[1-5, Don't know]**

Perf10 Explain: [ASK IF Perf10 < 3] Why were you not satisfied with your systems performance?
[OPEN END]

Battery Financing

[Ask If StorageFlag =1]

Own1. Did you purchase the battery storage system outright or did you finance it?

- 1 The battery storage system was purchased outright
- 2 The battery storage system was financed
- 99 Don't know

Alternatives

[If StorageFlag =1 Ask Alt1 – Alt4]

Alt1: According to our records, your SGIP application was for the following battery storage brand(s): [BatteryManufacturer]. Did you consider any other brands of battery storage systems? [FORCE RESPONSE]

- 1 Yes
- 2 No
- 99 Don't know

Alt2. [Ask If Alt1=1] What other brands did you consider? Select all that apply. [MULTI SELECT AND ROTATE 1-7]

- 1 Tesla Power Wall
- 2 LG Chem
- 3 Enphase
- 4 SunPower
- 5 NeoVolta
- 6 Generac
- 7 Sonnen
- 8 Other: _____ [FORCE RESPONSE]
- 99 Don't know [EXCLUSIVE]

Alt3: [Ask If Alt1 = 1] Why did you choose the brand you selected over the other alternatives? Select all that apply. [MULTI SELECT AND ROTATE 1-7]

- 1 Cost
- 2 Availability
- 3 Convenience
- 4 Reliability
- 5 Technology Features
- 6 Marketing/Branding
- 7 Brand Trust
- 8 It was the Only available technology offered by my installer.
- 9 Other (describe): _____ [FORCE RESPONSE]
- 99 Don't know [EXCLUSIVE]

Alt4: Since participating in the SGIP have you installed any additional non-incentivized batteries or PV panels?

- 1 Yes, purchased additional non-incentivized batteries
- 2 Yes, purchased PV panels
- 3 Yes, purchased both additional non-incentivized batteries and PV panels
- 4 No
- 99 Don't know

END: The survey has completed. Thank you for taking the time to provide your feedback on the Self Generation Incentive Program.

APPENDIX B APPLICANT AND HOST CUSTOMER SURVEY QUOTAS AND COMPLETES BY PA

This section contains the following sections:

B.1 – Applicant Survey Quotas and Completes by PA

B.2 – Host Customer Survey Quotas and Completes by PA

B.1 Applicant Survey Strata Quotas and Completes by PA

The number of completed applicant surveys by PA and budget category are provided in Tables B-1 – B-4 below. The stratification method employed resulted in increased PA totals compared to each PA’s individual year target sample, but a smaller quota compared to 2021 and 2022 target samples combined. For example, PG&E’s target sample for 2021 and 2022 is 50 for each year (100 combined), but the strata quotas result in 78 survey completes to achieve the stratification and confidence/precision goals. Strata quotas were developed as guides to completing the necessary surveys, not as hard targets. For any 1-5 scalar question reported as an average by PA throughout this report, the reported score is weighted by the applicant population distribution. All other reported applicant responses throughout the report are unweighted.

TABLE B-1: PG&E APPLICANT SURVEY STRATA QUOTA

Budget Category	Application Year	Applicant Population	% of Applicant Population	Strata Quota	n Completes	Achieved Sample Distribution
Small Residential Storage	PY 2021	33	12.8%	9	9	17.0%
	PY 2022	27	10.5%	8	8	15.1%
	PY 2022 and PY 2021	67	26.0%	19	17	32.1%
Large-Scale Storage	PY 2021	9	3.5%	3	2	3.8%
	PY 2022	24	9.3%	7	2	3.8%
	PY 2022 and PY 2021	22	8.5%	6	3	5.7%
Equity Resiliency	PY 2021	11	4.3%	3	2	3.8%
	PY 2022	26	10.1%	7	5	9.4%
	PY 2022 and PY 2021	29	11.2%	8	3	5.7%
Generation	All	5	1.9%	3	0	0.0%
Non-Residential Storage Equity		3	1.2%	3	1	1.9%
Residential Storage Equity		1	0.4%	1	1	1.9%
San Joaquin Valley Residential		1	0.4%	1	0	0.0%
PG&E Total		258	100%	78	53	100%

TABLE B-2: SCE APPLICANT SURVEY STRATA QUOTA

Budget Category	Application Year	Applicant Population	% of Applicant Population	Strata Quota	n Completes	Achieved Sample Distribution
Small Residential Storage	PY 2021	19	9.2%	5	1	2.9%
	PY 2022	11	5.3%	3	5	14.3%
	PY 2022 and PY 2021	65	31.4%	19	15	42.9%
Large-Scale Storage	PY 2021	10	4.8%	3	1	2.9%
	PY 2022	16	7.7%	5	0	0.0%
	PY 2022 and PY 2021	14	6.8%	4	3	8.6%
Equity Resiliency	PY 2021	23	11.1%	7	1	2.9%
	PY 2022	9	4.3%	3	2	5.7%
	PY 2022 and PY 2021	32	15.5%	9	6	17.1%
Generation	All	5	2.4%	3	1	2.9%
Non-Residential Storage Equity		2	1.0%	2	0	0.0%
Residential Storage Equity		0	0.0%	--	--	--
San Joaquin Valley Residential		1	0.5%	1	0	0.0%
SCE Total		207	100%	64	35	100%

TABLE B-3: SCG APPLICANT SURVEY STRATA QUOTA

Budget Category	Application Year	Applicant Population	% of Applicant Population	Strata Quota	n Completes	Achieved Sample Distribution
Small Residential Storage	PY 2021	7	7.3%	3	1	5.6%
	PY 2022	2	2.1%	2	1	5.6%
	PY 2022 and PY 2021	44	45.8%	12	10	55.6%
Large-Scale Storage	PY 2021	3	3.1%	3	0	0.0%
	PY 2022	12	12.5%	3	1	5.6%
	PY 2022 and PY 2021	5	5.2%	3	1	5.6%
Equity Resiliency	PY 2021	8	8.3%	3	0	0.0%
	PY 2022	0	0.0%	--	--	--
	PY 2022 and PY 2021	12	12.5%	3	4	22.2%
Generation	All	1	1.0%	1	0	0.0%
Non-Residential Storage Equity		1	1.0%	1	0	0.0%
Residential Storage Equity		1	1.0%	1	0	0.0%
San Joaquin Valley Residential		0	0.0%	--	--	--
SCG Total		96	100%	35	18	100%

TABLE B-4: CSE APPLICANT SURVEY STRATA QUOTA

Budget Category	Application Year	Applicant Population	% of Applicant Population	Strata Quota	n Completes	Achieved Sample Distribution
Small Residential Storage	PY 2021	10	8.8%	5	1	5.3%
	PY 2022	3	2.7%	3	0	0.0%
	PY 2022 and PY 2021	42	37.2%	19	9	47.4%
Large-Scale Storage	PY 2021	7	6.2%	3	1	5.3%
	PY 2022	12	10.6%	5	0	0.0%
	PY 2022 and PY 2021	9	8.0%	4	2	10.5%
Equity Resiliency	PY 2021	7	6.2%	3	0	0.0%
	PY 2022	6	5.3%	3	0	0.0%
	PY 2022 and PY 2021	16	14.2%	7	6	31.6%
Generation	All	0	0.0%	--	--	--
Non-Residential Storage Equity		1	0.9%	1	0	0.0%
Residential Storage Equity		0	0.0%	--	--	--
San Joaquin Valley Residential		0	0.0%	--	--	--
CSE Total		113	100%	53	19	100%

B.2 Host Customer Survey Strata Quotas and Completes by PA

The number of completed host customer surveys by PA, budget category, and applicant prolific status are provided in Tables B-5– B-8 below.

TABLE B-5: PG&E HOST CUSTOMER STRATA QUOTA, 2021 - 2022

PY	Applicant Proficiency	Budget Category	Host Customer Population	% of Host Customer Population	Strata Quota	n Completes	Achieved Sample Distribution
2021	Non-Prolific Applicant	Small Residential Storage	526	6.2%	8	45	6.1%
		Large-Scale Storage	90	1.1%	8	5	0.7%
		Residential Storage Equity	2	0.0%	2	0	0.0%
		Non-Residential Storage Equity	12	0.1%	8	0	0.0%
		Equity Resiliency	149	1.8%	8	29	3.9%
	Prolific Applicant	Small Residential Storage	3960	46.8%	44	322	43.7%
		Large-Scale Storage	266	3.1%	8	21	2.8%
		Residential Storage Equity	5	0.1%	5	1	0.1%
		Non-Residential Storage Equity	1	0.0%	1	0	0.0%
		Equity Resiliency	490	5.8%	8	45	6.1%
	All	San Joaquin Valley Residential	175	2.1%	8	2	0.3%
		Generation*	4	0.0%	4	0	0.0%
2022	Non-Prolific Applicant	Small Residential Storage	269	3.2%	8	28	3.8%
		Large-Scale Storage	143	1.7%	8	6	0.8%
		Residential Storage Equity	15	0.2%	8	0	0.0%
		Non-Residential Storage Equity	2	0.0%	2	0	0.0%
		Equity Resiliency	132	1.6%	8	19	2.6%
	Prolific Applicant	Small Residential Storage	1438	17.0%	32	121	16.4%
		Large-Scale Storage	206	2.4%	8	21	2.8%
		Residential Storage Equity	3	0.0%	3	0	0.0%
		Non-Residential Storage Equity	--	--	--	--	--
		Equity Resiliency	558	6.6%	12	72	9.8%
	All	SJV Residential	4	0.0%	4	0	0.0%
		Generation	3	0.0%	3	0	0.0%
PG&E 2021-2022 Total			8,453	100%	208	737	100%

TABLE B-6: SCE HOST CUSTOMER STRATA QUOTA

PY	Applicant Proficiency	Budget Category	Host Customer Population	% of Host Customer Population	Strata Quota	n Completes	Achieved Sample Distribution	
2021	Non-Prolific Applicant	Small Residential Storage	274	3.8%	8	27	4.2%	
		Large-Scale Storage	61	0.8%	8	2	0.3%	
		Residential Storage Equity	--	--	--	--	--	
		Non-Residential Storage Equity	9	0.1%	8	0	0.0%	
		Equity Resiliency	282	3.9%	8	31	4.8%	
	Prolific Applicant	Small Residential Storage	963	13.2%	20	81	12.6%	
		Large-Scale Storage	109	1.5%	8	7	1.1%	
		Residential Storage Equity	9	0.1%	8	1	0.2%	
		Non-Residential Storage Equity	1	0.0%	1	0	0.0%	
		Equity Resiliency	1,332	18.3%	27	125	19.4%	
	All	San Joaquin Valley Residential	4	0.1%	4	0	0.0%	
		Generation*	8	0.1%	8	0	0.0%	
	2022	Non-Prolific Applicant	Small Residential Storage	429	5.9%	8	41	6.4%
			Large-Scale Storage	88	1.2%	8	7	1.1%
Residential Storage Equity			2	0.0%	2	0	0.0%	
Non-Residential Storage Equity			6	0.1%	6	1	0.2%	
Equity Resiliency			120	1.6%	8	16	2.5%	
Prolific Applicant		Small Residential Storage	3,001	41.2%	44	246	38.2%	
		Large-Scale Storage	107	1.5%	8	7	1.1%	
		Residential Storage Equity	6	0.1%	6	2	0.3%	
		Non-Residential Storage Equity	--	--	--	--	--	
		Equity Resiliency	456	6.3%	8	49	7.6%	
All		San Joaquin Valley Residential	10	0.1%	8	1	0.2%	
		Generation	--	--	--	--	--	
SCE 2021-2022 Total			7,277	100%	214	644	100%	

TABLE B-7: SCG HOST CUSTOMER STRATA QUOTA

PY	Applicant Proficiency	Budget Category	Host Customer Population	% of Host Customer Population	Strata Quota	n Completes	Achieved Sample Distribution
2021	Non-Prolific Applicant	Small Residential Storage	129	7.8%	8	12	8.0%
		Large-Scale Storage	19	1.2%	8	1	0.7%
		Residential Storage Equity	2	0.1%	2	0	0.0%
		Non-Residential Storage Equity	1	0.1%	1	0	0.0%
		Equity Resiliency	110	6.7%	8	13	8.7%
	Prolific Applicant	Small Residential Storage	387	23.5%	21	37	24.7%
		Large-Scale Storage	46	2.8%	8	8	5.3%
		Residential Storage Equity	65	3.9%	8	7	4.7%
		Non-Residential Storage Equity	1	0.1%	1	0	0.0%
		Equity Resiliency	352	21.4%	19	35	23.3%
	All	San Joaquin Valley Residential	--	--	--	--	--
		Generation*	1	0.1%	1	0	0.0%
2022	Non-Prolific Applicant	Small Residential Storage	79	4.8%	9	3	2.0%
		Large-Scale Storage	38	2.3%	8	2	1.3%
		Residential Storage Equity	--	--	--	--	--
		Non-Residential Storage Equity	8	0.5%	8	0	0.0%
		Equity Resiliency	24	1.5%	8	2	1.3%
	Prolific Applicant	Small Residential Storage	195	11.8%	22	14	9.3%
		Large-Scale Storage	59	3.6%	8	8	5.3%
		Residential Storage Equity	--	--	--	--	--
		Non-Residential Storage Equity	1	0.1%	1	0	0.0%
		Equity Resiliency	129	7.8%	15	8	5.3%
	All	San Joaquin Valley Residential	--	--	--	--	--
		Generation	--	--	--	--	--
SCG 2021-2022 Total			1,646	100%	164	150	100%

TABLE B-8: CSE HOST CUSTOMER STRATA QUOTA

PY	Applicant Proficiency	Budget Category	Host Customer Population	% of Host Customer Population	Strata Quota	n Completes	Achieved Sample Distribution
2021	Non-Prolific Applicant	Small Residential Storage	256	8.5%	8	37	10.5%
		Large-Scale Storage	44	1.5%	8	5	1.4%
		Residential Storage Equity	--	--	--	--	--
		Non-Residential Storage Equity	5	0.2%	5	0	0.0%
		Equity Resiliency	115	3.8%	8	13	3.7%
	Prolific Applicant	Small Residential Storage	1,070	35.4%	33	107	30.4%
		Large-Scale Storage	92	3.0%	8	8	2.3%
		Residential Storage Equity	--	--	--	--	--
		Non-Residential Storage Equity	--	--	--	--	--
		Equity Resiliency	366	12.1%	11	53	15.1%
	All	San Joaquin Valley Residential	1	0.0%	1	0	0.0%
		Generation*	--	--	--	--	--
2022	Non-Prolific Applicant	Small Residential Storage	99	3.3%	8	13	3.7%
		Large-Scale Storage	41	1.4%	8	2	0.6%
		Residential Storage Equity	--	--	--	--	--
		Non-Residential Storage Equity	--	--	--	--	--
		Equity Resiliency	61	2.0%	8	12	3.4%
	Prolific Applicant	Small Residential Storage	673	22.2%	38	73	20.7%
		Large-Scale Storage	66	2.2%	8	10	2.8%
		Residential Storage Equity	--	--	--	--	--
		Non-Residential Storage Equity	--	--	--	--	--
		Equity Resiliency	137	4.5%	8	19	5.4%
	All	San Joaquin Valley Residential	--	--	--	--	--
		Generation	--	--	--	--	--
CSE 2021-2022 Total			3,026	100%	160	352	100%

APPENDIX C SELECT HOST CUSTOMER SURVEY RESPONSE TABLES BY PROGRAM YEAR

This section contains Host Customer Survey Responses by program year (2018, 2020 – 2022)

TABLE C-1: HOST CUSTOMER CLARITY WITH PROGRAM ASPECTS

Program Aspect		Average Rating 2018	Average Rating 2020	Average Rating 2021	Average Rating 2022
PG&E	Eligibility requirements	3.3	3.5	3.3	3.0
	Documentation requirements	3.2	3.4	3.1	2.9
	Program timelines	2.9	2.8	2.9	2.8
	Application status	3.2	2.9	3.3	3.0
	Division of responsibility	3.5	3.8	3.2	2.9
SCE	Eligibility requirements	3.3	3.8	3.6	3.5
	Documentation requirements	3.3	3.3	3.4	3.3
	Program timelines	3.3	3.1	3.1	3.0
	Application status	3.7	3.3	3.4	3.3
	Division of responsibility	3.5	3.9	3.4	3.2
SCG	Eligibility requirements	3.4	4.1	4.0	3.6
	Documentation requirements	2.8	3.9	3.8	3.4
	Program timelines	2.9	3.4	3.4	3.0
	Application status	3.9	3.8	3.6	3.8
	Division of responsibility	3.4	3.9	3.4	3.3
CSE	Eligibility requirements	3.6	4.1	3.8	3.6
	Documentation requirements	3.4	3.9	3.5	3.4
	Program timelines	2.9	3.3	3.0	2.9
	Application status	3.5	3.5	3.4	3.2
	Division of responsibility	3.7	3.8	3.5	3.3

TABLE C-2: HOST CUSTOMER SATISFACTION WITH PROGRAM COMMUNICATION

Program Aspect		Average Rating 2018	Average Rating 2020	Average Rating 2021	Average Rating 2022
PG&E	Communications from PA regarding SGIP	3.2	3.0	3.0	3.1
	Communications from Applicant regarding SGIP	3.5	3.5	3.5	3.6
SCE	Communications from PA regarding SGIP	3.7	3.4	3.4	3.4
	Communications from Applicant regarding SGIP	3.6	3.6	3.6	3.3
SCG	Communications from PA regarding SGIP	3.7	3.7	3.7	3.6
	Communications from Applicant regarding SGIP	3.1	3.8	3.8	3.7
CSE	Communications from PA regarding SGIP	3.6	3.6	3.6	3.3
	Communications from Applicant regarding SGIP	3.7	3.8	3.6	3.8

APPENDIX D APPLICANT SURVEY RESPONSE FREQUENCIES

This section contains the Applicant survey response frequencies. Survey response frequencies are embedded into this PDF—see directions below.



Appendix_D_Applicant_Survey_Response_F

*To Open and View the embedded file “**Appendix_D_Applicant_Survey_Response_Frequencies**,” first click on the paper clip icon on the left Adobe Acrobat menu bar to view the Excel File Attachments. Double click on the preferred file to open in Excel.*



APPENDIX E HOST CUSTOMER SURVEY RESPONSE FREQUENCIES

This section contains the Host Customer survey response frequencies. Survey response frequencies are embedded into this PDF—see directions below.



Appendix_E_Host_Customer_Survey_Resp

*To Open and View the embedded file “**Appendix_E_Host_Customer_Survey_Response_Frequencies**,” first click on the paper clip icon on the left Adobe Acrobat menu bar to view the Excel File Attachments. Double click on the preferred file to open in Excel.*

