

Attachment A: SGIP Equity Resiliency Eligibility Matrix – Residential Customers, version 3¹

Residential Equity Resiliency applicants must comply with a specified pathway under <u>both</u> criteria 1 & 2 (i.e. an option under 1 & an option under 2):			
Criteria:	Pathways for eligibility:	Description:	Additional Guidance:
1.	a) In HFTD Tier 2 or 3; or,	Located in a High Fire Threat District (HFTD) Tier 2 or Tier 3. Process initiated in D.17-01-009 and modified by D.17-06-024. ²	Maps available here: https://www.cpuc.ca.gov/general.aspx?id=6442454972
	b) Have experienced ≥ 2 PSPS events.	Customers whose electricity was shut off during two or more discrete Public Safety Power Shutoff (PSPS) events prior to the date of application for SGIP incentives. ³	List of circuits with two or more PSPS events posted on SGIP portal. To be updated 30 days after new PSPS event. ⁴
AND:			
2.	a) Eligible for the equity budget; or, <i>(continued on next page)</i>	Low-income residential customers living anywhere in IOU service territory ⁵ but must reside in a qualifying multi-family residential deed-restricted building or a low-income single-family residence that conforms with Section 2852 such that: (1) household income does not exceed 80 percent of the median income for the area; AND (2) the residence is subject to a resale restriction or an equity sharing agreement, ⁶ [See next page: <u>Low-Income Residential Housing</u>] Residential customers in California Indian County are subject to the same equity budget eligibility requirements adopted for residential customers in D.17-10-004 except they are not required to reside in deed or resale restricted housing pursuant to Section 2852. ⁷	Residential properties in Indian Country ⁵⁷ : 1) multi-family housing in California Indian Country is eligible for the Equity Budget if it demonstrates that it has at least five rental housing units where at least 80% of the households have incomes at or below 60% of the area median income. Any customer account in such buildings will be eligible for the Equity Budget. 2) Single family residences in California Indian Country are eligible for the equity budget if the customer provides documentation showing that the host customer’s household income is 80% of the area median income or less as required in Section 4.6.1.6 of the SGIP Handbook.

¹ Version 3 of this matrix was published on 10/29/20 to update item 2(e) in the table to reflect changes made in Decision 20-10-025.

² D.19-09-027 at 23-24.

³ D.20-01-021 at OP 19.

⁴ Id. at 43.

⁵ All California Indian Country defined as DACs for purposes of SGIP equity budget. D.19-09-027 at 11.

⁶ D.20-07-015 at OP 2.

⁷ D.20-07-015 at OP 1 and 2.

	b) Eligible for medical baseline; or,	Eligible for the medical baseline program as defined in D.86087, 80 CPUC 182.	Low-income residential housing requirements do not apply. ⁸
	c) Have serious illness/condition that’s life-threatening if disconnected; or,	Customer that has notified their utility of a serious illness or condition that could become life-threatening if electricity is disconnected, as defined in D.12-03-054.	Low-income residential housing requirements do not apply. ⁶
	d) Have SASH, DAC-SASH, MASH, or SOMAH incentives reserved; or,	SGIP applicants who can demonstrate they have received an “incentive reserved” status in the SASH, DAC-SASH, MASH, or SOMAH programs are deemed eligible for the SGIP equity budget.	Incentive reservation letter or equivalent documentation verifying that applicant is approved to participate in listed programs is sole documentation needed . ⁹
	e) Household reliant on electric pump wells for water supplies. ¹⁰	Households that rely on electric-pump wells for their water supply must demonstrate an annual household income of no greater than 80 percent of Areas Median Income (AMI) and residential multi-family buildings to demonstrate they are either located in a disadvantaged community as defined by SGIP or that at least 80 percent of building households have incomes at or below 60 percent of AMI. Households must also provide an attestation, under penalty of perjury, stating that the storage installation site is a primary residence occupied by either a homeowner or tenants; and provide an attestation, under penalty of perjury, stating that the residence is not provided water by a municipal or private utility. ¹¹	Customers that do not rely on an electric-pump well for their water supply but instead rely on an electric booster pump to access water provided by a municipal or private utility are <u>not</u> eligible. Customers that are eligible to be served by a municipal water district or private utility but do not take such service and instead rely on an electric-pump well for their water supply are eligible, if the customer meets all other required criteria. ¹²

⁸ D.19-09-027 at 23.

⁹ Id at 97-98.

¹⁰ D.20-01-021 at 45.

¹¹ D.20-10-025- at OP 1-2 and COL 1-5.

¹² Id at OP 2 and COL 6.

Definitions:

Low-Income Residential Housing:

- **Multifamily residential building**ⁱ of at least five rental housing units that is operated to provide deed-restricted low-income residential housing (described in clause (i) of subparagraph (A) of paragraph (3) of subdivision (a) of § 2852 of the Public Utilities Codeⁱⁱ) **and** is either:
 - 1) In a **Disadvantaged Community**; or
 - 2) A building where at least 80% of the households have incomes at or below 60% of the area median income, as defined in subdivision (f) of § 50052.5 of the Health and Safety Code.ⁱⁱⁱ Any customer account in such buildings will be eligible for the SGIP Equity Budget.
- **Single-family homes**^{iv} are also eligible regardless of location if they are a low-income residence, as described in subparagraph (C) of paragraph (3) of subdivision (a) of § 2852 of the Public Utilities Code, including that the household's income does not exceed 80% of the median income for the area^v. Per the SGIP Handbook, a presumed resale restriction may also be demonstrated to meet the resale restriction eligibility requirement, such as single-family homes located in IRS-defined Qualified Census Tracts^{vi} and other designated areas eligible for the Single-Family Affordable Solar Homes (SASH) program.^{vii}

Disadvantaged Community: Any census tract that ranks in statewide top 25% most affected census tracts in most recent version of CalEnviroScreen or census tracts that score within highest 5% of CalEnviroScreen's pollution burden, but do not receive an overall CalEnviroScreen score.^{viii}

ⁱ Defined in AB 693. See D.17-010-004 at 14-15.

ⁱⁱ Public Utilities Code § 2852(a)(3)(A)(i): The rents of the occupants who are lower income households do not exceed those prescribed by deed restrictions or regulatory agreements pursuant to the terms of the financing or financial assistance.

ⁱⁱⁱ Health and Safety Code § 50052.5(f): For purposes of this section, "area median income" shall mean area median income as published by the department pursuant to Section 50093. Health and Safety Code § 50093: As used in this section, "area median income" means the median family income of a geographic area of the state, as annually estimated by the United States Department of Housing and Urban Development pursuant to Section 8 of the United States Housing Act of 1937. In the event these federal determinations of area median income are discontinued, the department shall establish and publish as regulations income limits for persons and families of median income for all geographic areas of the state at 100 percent of area median income, and for persons and families of low or moderate income for all geographic areas of the state at 120 percent of area median income. These income limits shall be adjusted for family size and shall be revised annually.

^{iv} D.17-10-004 at 15.

^v Public Utilities Code § 2852(a)(3)(C): An individual residence sold at an affordable housing cost to a lower income household that is subject to a resale restriction or equity sharing agreement, for which the homeowner does not receive a greater share of equity than described in paragraph (2) of subdivision (c) of Section 65915 of the Government Code, with a public entity or nonprofit housing provider organized under Section 501(c)(3) of the Internal Revenue Code that has as its stated purpose in its articles of incorporation on file with the office of the Secretary of State to provide affordable housing to lower income households.

^{vi} Qualified Census tracts are defined by Internal Revenue Code Section 143(j)(2) as "a tract in which 70 percent or more of the families have income which is 80 percent or less of the statewide median family income" https://www.huduser.gov/portal/sadda/sadda_qct.html

^{vii} Decision 15-01-027 allows presumed resale restrictions within the SASH program, such as those found in federally-designated Empowerment Zones, Enterprise Communities, certain Neighborhood Revitalization Areas, Targeted Employment Areas, and Qualified Census Tracts.

^{viii} Decision 17-10-004 COL 2.