

Meeting Notes

Solar on Multifamily Affordable Housing (SOMAH) Advisory Council Meeting

November 18, 2019

PLACE for Sustainable Living, 1121 64th St., Oakland, CA 94608

Attendees

SOMAH Program Administrators

Chris Walker | SOMAH Program Manager (SOMAH Program Administrator)
David Lee | SOMAH Technical Assistance Coordinator (SOMAH Program Administrator)
Marisa Villarreal | SOMAH Program Manager (SOMAH Program Administrator)
Staci Hoell | SOMAH Workforce Development Program Manager (SOMAH Program Administrator)

SOMAH Advisory Council Members

Allen Hernandez | Executive Director, Center for Community Action and Environmental Justice
Agustin Cabrera | Senior Community Organizer, Los Angeles Alliance for a New Economy
Andrea Barnier | Senior Asset Management Specialist, Self-Help Enterprises
Andres Ramirez | Policy Director, Pacoima Beautiful
Lauren Randall | Director of Public Policy & Market Development, Sunrun
Cynthia Strathman | Executive Director, Strategic Actions for a Just Economy
JB Tengco | West Coast Director, BlueGreen Alliance
Kenneth Wells | CEO & Founder, O&M Solar Services (Chair)
Sochiata Vutthy | Senior Asset Manager, Community Housing Works

Meeting Agenda

1. [Meeting Welcome & Re-introductions](#)
2. [Vice-Chair Election](#)
3. [Program Status & Update](#)
4. [Workforce Update & JTO Task Force Preview](#)
5. [Application Waitlist Update](#)
6. [2020 Marketing, Education & Outreach Plan Overview](#)
7. [Next Steps & Wrap-up](#)

Meeting Notes

Meeting Welcome and (Re)introductions

- *Introducing new Advisory Council member*
- *Intention-setting and communication exercise*
- *Meeting goals and agenda overview*

Marisa Villarreal led a welcome and round of re-introductions for the Advisory Council (AC), welcoming Lauren Randall, Director of Public Policy & Market Development at Sunrun, to the Council as the newest Advisory Council member. Marisa also reviewed the meeting goals and agenda. David Lee led an intention-setting activity to start the meeting.

Vice-Chair Elections

- *Select Vice-Chair per Advisory Council [Bylaws](#)*

Council member Agustin Cabrera was nominated by AC Chair Kenneth Wells to run for Vice-Chair. They were then elected unanimously to serve as Vice-Chair

Program Status & Update

- Recap: Previous meeting, pending action items, and updates on action items
- Program overview and status

- Marisa Villarreal led a recap of the previous AC meeting (see notes [here](#)), and pending action Advisory Council action items.
- The program status update included a review of SOMAH Program Goals, and
- updates. Some key updates by program area are below:

Applications

- 117 active applications
- 136 applications on the waitlist

Utility Territory	# of Active Applications	# of Waitlist Applications
Pacific Gas & Electric	53	59
Southern California Edison	52	41
San Diego Gas & Electric	12	36
PacifiCorp	0	0
Liberty Utilities	0	0
Totals	117	136

- 7 participating contractors
- 92.% of solar credits allocated to tenants
- Average system size of 292 kW
- 6 Track A applications (waitlisted)
- 86 % of SOMAH applications were submitted on day one
- There is a need to communicate the opportunity of SOMAH in Pac Corp and Liberty, as no applications have been submitted in these territories.
- The next round of program funding is expected to be available between December 2019 and Feb 2020
- The SOMAH PA is still encouraging the submission of applications, despite waitlist times so applicants can receive the year one incentive rate
- Several AC members noted that large primary contractors often use subcontractors to complete projects, and how the SOMAH PA was tracking and collecting data on subcontractor composition and participation.
 - As part of the application process, contractors are required to provide information on the subcontractors they are employing for each project.

Marketing Education & Outreach (ME&O)

- The 2020 Annual ME&O plan is in the final stages of development. A full draft of the plan is due to The Energy Division for review December 1, 2019 and will be finalized by February 2020.
- The 2020 ME&O plan outlines the high-level goals and objectives for SOMAH's ME&O efforts for 2020, and provides activities, tactics, as well as KPIs for each

objective. The plan is being developed with input from SOMAH's community-based organization (CBO) partners, who are also drafting their own individual ME&O plans.

- The SOMAH PA has continued to provide informational webinars and trainings for contractors, job training organizations, and property owners, with webinar attendance ranging from 15-40 participants.
- SOMAH's CBO partners are supporting the SOMAH PA's ME&O efforts:
 - The California Environmental Justice Alliance is coordinating the development of a CBO outreach curriculum
 - CBOs are responsible for the development and translation of materials that are culturally appropriate
 - CBOs are also playing an important role in direct outreach to eligible tenants, and amplifying local/community stories about SOMAH

Workforce Development

- The SOMAH PA, in partnership with Rising Sun Energy Center, is continuing to increase trainee and job training organization membership on the SOMAH job portal. Current stats are below:
 - 121 Job trainees on portal - 44% in DACs
 - 60 Eligible job training organizations (JTOs) on the portal
- The SOMAH PA has participated in 5 job fairs and hosted 3 webinars to drive participation and membership on the SOMAH job portal, and to share information about SOMAH's job training opportunities
- More information about SOMAH's workforce development efforts are provided in the [Workforce Update and JTO Task Preview session](#)

Technical Assistance

- SOMAH's Track A pipeline is not robust at the moment and so technical assistance demand is low. Currently there are 6 Track A applications in the pipeline of current projects
- The team is continuing to market the Track A pathway to property owners, and technical assistance offerings.
- The team is also continuing to assess the potential demand for technical assistance through market research, and "TA-Light" offerings -- mini assessments that garner interest from property owners by giving an assessment for properties without utilizing usage data.
- The TA team is also working with the ME&O team to help market the TA offering to property owners through a video series, and an informational one-pager

Program Implementation

- The SOMAH PA is continuing to work closely with SOMAH's participating

Investment-owned Utilities (IOUs) via monthly Working Group Meetings, where topics include program updates, milestones, data sharing, and progress.

Workforce Update & JTO Task Force Preview

- *Outreach updates*
- *Task Force Structure and Framework*
- *Upcoming projects and challenges*

- SOMAH's Workforce Development Manager Staci Hoell shared an overview of the workforce development program including the program goals and outreach stats. She also previewed the JTO Task Force proposal for AC input and feedback.

Workforce Development Overview

- The goals of the Workforce Development program are to provide paid, solar job training opportunities with every SOMAH installation, and to promote local (i.e. within county of SOMAH project) and targeted (DAC residents, women, people of color, re-entry individuals)
- SOMAH has an online job portal to connect eligible trainees to SOMAH job opportunities Current:
 - 123 job trainees are registered on the job training portal
 - 44% of job trainees are located in DACs
 - 21% receive government benefits
 - 25% under- and unemployed
 - 15% previously involved in criminal justice system
 - 60 JTOs are currently in the database with over 300+ eligible JTOs
- Many trainees are coming from robust certification programs where they have a wide array of certificates and credentials
- Staci also provided a snapshot of upcoming projects that include surveying trainees and contractors for information on job experiences; having CBO's support tenants in taking advantage of SOMAH's job opportunities; developing contractor engagement resources; and developing resources for job trainees (i.e. a solar training model) with Rising Sun
- AC members shared their connection to solar job training and current actions their organizations are taking in their regions of operation
 - Sochiata Vutthy (Community Housing Works): Community Housing Works participated in the Multifamily Affordable Solar Housing (MASH) program that had requirements for educating and training residents about solar.

CHW developed hands-on-training and worked with contractors to implement this training which resulted in a handful of people getting hired on to support construction in properties.

- Lauren Randall (Sunrun): Sunrun's perspective is one of supporting a trainee to the full-time pathway. The SOMAH program provides a huge opportunity with a whole pipeline that we really want to help fill.
- Kenneth Wells (O&M Solar): Kenneth believes this is a big opportunity for reentry individuals. Solar is an industry where a four-year degree isn't required and is one of few industries that supports individuals with prior convictions (i.e. reentry individuals) in accessing jobs. For O&M it's important to be a voice for reentry individuals, and to help them see themselves with a career in solar.
- Agustin Cabrera (LAANE): LAANE helps pass policies that uplift working standards with good union jobs. With SOMAH they're interested in crossover with union apprentice jobs, and how the program works with labor organizations, and to gather trainee feedback to make program improvements
- Andres Ramirez (Pacoima Beautiful): Andres noted it's important to ensure that the workforce pipeline that gets created actually gets hired to full-time jobs. Getting hired on a long-term career path (beyond a training program), is a big challenge that DACs face.

JTO Task Force

- The SOMAH PA is launching a JTO Task Force to:
 - Ensure that JTO voices and interests remain at the forefront of SOMAH's job training efforts, and that trainees have meaningful and career-advancing experiences
 - Provide insight, feedback, and advice to the SOMAH PA to meet workforce development goals, encourage local hiring, and maximize hiring benefits for disadvantaged communities
- The JTO Task Force will launch with a call for applications for members in December 2019
- The AC suggested support for a yearly cross-over meeting between the JTO Task Force and the AC and for a JTO Task Force "report-out" at each AC meeting
- The AC also provided feedback on membership criteria; the full list is below:
 - Representative of a JTO:
 - Administrators, leaders, instructors, participants, or alumni
 - Open to non-SOMAH eligible JTOs or workforce development programs

- SOMAH PA partners, subcontractors, and GRID affiliates are not eligible
- Regionally diverse:
 - One member from each region: Bay Area, Central Coast, Central Valley,
 - Los Angeles, Inland Empire, San Diego, and Northern California
- Selection process:
 - Connection to participants, subject-matter expertise, letter of interest, and commitment to diversity, equity, and inclusion

Discussion:

- Q: Are contractors required to enter a job on the SOMAH Job Portal?
- A: They're required to enter a job but can choose to make it "public" or "private" -- "private" means only the SOMAH PA can see the posting and "public" means only job trainees can see it (search for it, apply for it, etc.). Contractors might already have existing relationships with JTOs, want to hire tenants, or have people on staff that will already meet trainee requirements, which is why they are allowed to make the listing private.

- Q: How are you collecting trainee demographic information?
- A: The Job Trainee Intake Form is where we collect demographic information.

- Q: Is there a specific way that applicants are coming in? Are they coming in through job training programs?
- A: Most of the applicants are referred by JTOs the SOMAH PA is in contact with already. Applicants also directly sign up at solar job fairs. Staci, SOMAH's Workforce Development Manager conducts presentations at JTOs to trainees and through webinars, which also help drive referrals to the portal.

- Q: The AC suggested reaching out to Native American reservations to increase regional diversity, as well as access to native communities.
- A: The SOMAH PA is looking into the eligibility of tribal owned properties to participate in the SOMAH program, however the SOMAH PA can focus on reaching out to JTO's, and trainees on native lands to increase their participation in the workforce development program.

- Q: Can/should contractors be included in the JTO Task Force? Having contractors could help inform training strategies to create a larger hiring pool.
- A: The SOMAH PA believes it's important to have the contractor perspective and understand their needs and emphasized that during selection criteria there is a

balance of different JTO types. They're hopeful that the contractors that sit on the AC can help inform how to support job trainees and contractors in hiring and job placement.

- Q: An AC member noted that contractors may need additional support and guidance in how to work with trainees that come from a diversity of backgrounds that may require additional support. In other words, addressing unhealthy stigmas and biases that may come along with hiring individuals who may be reentry, or new to a professional experience. Committing to hiring a trainee might require a contractor to commit providing additional support and modifying expectations. We see people as a number and a paycheck, from a capitalist mindset, but people from disadvantaged backgrounds have challenges they're facing, and a workplace needs to be conducive to setting them up for success.
- Q(follow-up): What do contractors need to create a meaningful experience that addresses some of these issues?
- A: Resources and guidance from the SOMAH PA for the contractors that are participating in the program around this specific issue.

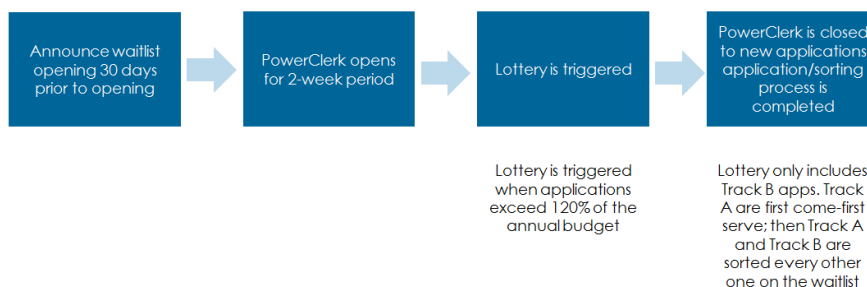
- Q (Staci): What about the AC body was attractive, in terms of messaging this opportunity to serve on this type of council?
- A: The opportunity to support a program focused on equity.
 - JTOs are data-oriented, so noting how you're assessing your commitment to DE&I.
 - Thinking about the links and alignment between one's organizational mission and the mission of the program and Task Force.
 - JTOs are also trying to figure out what the barriers are to trainee success -- framing the Task Force as a way to discuss and address barriers to entry for trainees creates more of an incentive.

- Q: Could the SOMAH PA develop a SOMAH-branded logo/certification for contractors to motivate their engagement -- something to put on letterhead or materials as an "award"?
- A: There's a logo that contractors can use to note that they are SOMAH eligible, but the SOMAH PA is open to thinking about other icons that indicate a "rating" system.
- Q: The SOMAH PA could highlight contractors that have "committed" to SOMAH program goals, through a media spotlight or press release.
- A: The SOMAH PA has thought about media spotlights, case-studies, or other ways to incentivize contractors to participate and provide quality job training experiences.

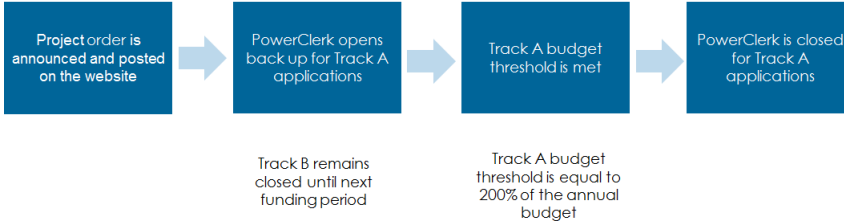
Application Waitlist Update

- *Review current waitlist status and closures*
- *Application and waitlist proposal*
- Chris Walker led this session reviewing a proposal for managing the waitlisted pipeline of applicants.
- The current application pipeline model is first-come, first-serve, which primarily supports contracts that are in-the-know, and familiar with the program and how to navigate its requirements.
- Pent up demand prior to SOMAH's launch has led to long waitlists that have had to close in some regions.
- There is a need to “level the playing field, to increase contractor diversity, reach smaller properties, and expand to harder-to-reach communities.
- Track A is a way to support contractors with acquisition costs -- providing “warm-leads”/property owners applying to the program, looking for contractor bids. Track A also supports property owner and contractor diversity, and as such the SOMAH PA has noted that the program needs to emphasize the Track A pathway and pipeline.
- The PA has proposed to introduce a pace-dependent lottery system for managing the application pipeline: one where a lottery is triggered, and one where a lottery is not triggered
- **Scenario 1: A lottery is triggered:**

Lottery is triggered

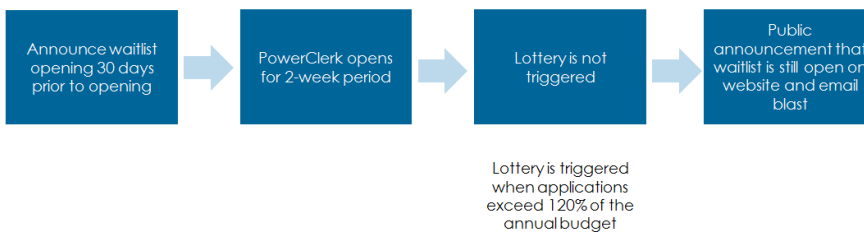


Lottery is triggered, cont.

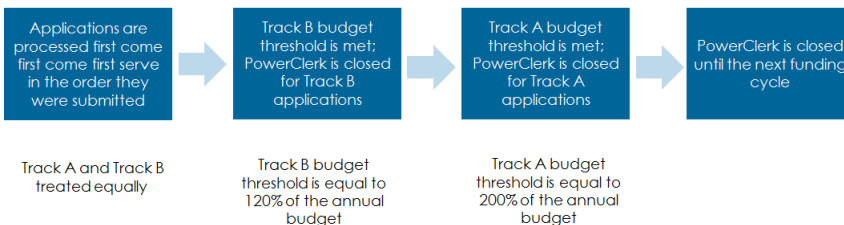


- **Scenario 2: A lottery is not triggered:**

Lottery is not triggered



Lottery is not triggered, cont.



- The PA noted that this proposal is not about leaving anyone out, but about changing the order in which they are served.
- The PA would have this new system be announced this year, via a Program Handbook change, and Tier 2 Advice Letter process, including public comments/prottests.

Discussion:

- Q: Two weeks is not enough time for contractors to get their application materials together.
- A: The announcement of the lottery would be made 30 days prior to any change. After 30 days, the 2-week period begins
- Q: Concern around having multiple waves of applicants from the 30-day announcement and the 2-week period after opening.

- A: The SOMAH PA can implement something for Track A that allows property owners to note if they don't have a contractor in place. Even with a waiver, property owners may have already received multiple bids before starting the reservation process. There could also be a self-reporting process for property owners to share how they are selecting contractors.

- Q: Is the new funding cycle every 6 months?
- A: That is the understanding -- the next round of funding will be made available sometime between December 2019 and February 2020, but exact timing will differ by IOU.

- Q: When new funding is made available, and the incentive rate is decreased, how will this be communicated?
- A: We will share this information through an announcement to our listserv and ask our partners and stakeholders to help share the information with their networks and communities. Additionally, if there is interest in how the SOMAH PA will plan on communicating this information, the SOMAH PA can follow up with the AC at a later-date.

- Q: Why are properties on tribal lands ineligible for SOMAH
- A: The SOMAH PA does not have clarity on whether properties on tribal lands are ineligible nor why this may be the case. However, the SOMAH PA is working to clarify this and will follow up with the AC once their eligibility status is confirmed.

- Q: Why is there a lack of applications in Question about the lack of applications in the Liberty and PacifiCorps IOU territories, and what this might be attributable to?
- A: The remoteness and low volume of potential SOMAH-eligible properties (lower number of multifamily affordable housing properties) are potential factors.

2020 Marketing, Education & Outreach Plan Overview

- *Review 2020 ME&O plan objectives and key tactics*

- Marisa Villarreal provided an overview of the 2020 ME&O Plan including its objectives, and how the plan outlines adapted priorities based on 2019 outcomes.
- Lessons learned from 2019 ME&O efforts included:
 - Lots of pent-up demand -- high application volume and immediate

- waitlists on Day 1 of launch
- Contractor-driven -- nearly all of the applications were submitted through the Track B pipeline, with a very low volume of Track-A applications
- Low contractor diversity: While there are over 100 SOMAH eligible contractors, only 7 are participating in the program (though the number of subcontractors participating is still being determined)
- ME&O priorities for the 2020 program year include:
 - Increase geographic diversity of projects
 - Increasing diversity of contractors and property types
 - Emphasize Track A pathway and better understand demand for technical assistance
 - Direct property-owner outreach
 - Direct tenant outreach and education
 - Increased job trainee opportunities and participation
 - Waitlist engagement

Discussion:

- Q: Would qualifying tenants who have participated in an eligible job training program be considered a trainee or a tenant that's eligible for SOMAH job training opportunities?
- A: They would be considered as a tenant, for our metrics/KPI tracking, though we'd want to be tracking how many tenants actually have participated in a job training program

- Q: Concern that tenants lack formal training. Even though they automatically qualify as eligible installers, their lack of formal training is not going to make them an attractive, nor competitive hire.
- A: JTOs are providing support through workshops for tenants who are interested in accessing job opportunities through SOMAH, for SOMAH projects.

- Q: How do you make tenants competitive in the SOMAH job market?
- A: This has come up at Sunrun, and the story of hiring a tenant is actually attractive, so there is a marketable incentive.

- Q: How do these tenants receive the training that they may need to adequately and safely work on a SOMAH project?
- A: Tenants do automatically qualify for SOMAH job opportunities, without requiring any training hours. Right now, we're trying to work with JTOs to help provide education and support for interested tenants. The SOMAH PA is considering changing the job notice time for contractors from 30 days to 60

days, which would give tenants more of an opportunity to prepare for SOMAH job opportunities.

- Q (follow-up): This may not be enough time, regardless. The SOMAH PA may want to open opportunities for tenants across all SOMAH projects to allow time for training. In other words, tenants would be able to become installers on other projects, if they are unable to at the time of install for the property where they reside.
- A (follow-up): The SOMAH PA is making tenants aware of training opportunities while applications are submitted, and properties are being processed. Ultimately, tenant education is the responsibility of the property owner. Contractors also distribute information about opportunities. The SOMAH PA could work with property owners and contractors to promote job opportunities (i.e. posting on community boards or front office desks). Also, important to note that tenant education materials will be translated into 7 languages by January 2020.
- Q: How were SOMAH's CBO partners selected to formally support MEO efforts? Will new CBOs be selected each year to ensure geographic coverage?
- A: CBO partnerships were baked into the program (via the Program Handbook) and were selected via a competitive RFP process. That process will be revisited in June 2020, at which point in time the PA will decide whether or not to renew existing CBO contracts or open up participation to new CBOs.

Next Steps & Wrap-Up

- *Identify AIs for PA Team and*
- *Scheduling next meeting (location preference and date)*
- The next AC meeting will be held on February 6, 2020 in the San Diego region