



SOLAR ON MULTIFAMILY AFFORDABLE HOUSING

# **PUBLIC FORUM:** February 23, 2022



# Welcome & Introductions

## Agenda Overview

|             |   |
|-------------|---|
| 1:00 - 1:10 | <b>Welcome &amp; Introductions</b>  |
| 1:10 - 1:30 | <b>SOMAH Program Update</b> <ul style="list-style-type: none"><li>• Key program stats &amp; updates</li><li>• Eligible properties map tool updates and demo</li><li>• Q&amp;A/Discussion</li></ul>  |
| 1:30 - 2:20 | <b>SOMAH's Third-party Evaluation: Recommendations &amp; Implementation</b> <ul style="list-style-type: none"><li>• Review of key recommendations</li><li>• SOMAH's priorities and next steps for implementation</li><li>• Q&amp;A/Discussion</li></ul> |
| 2:20-2:30   | <b>Looking Ahead &amp; Next Steps</b>   |

# SOMAH Stands with Black Lives Matter



SOMAH stands in solidarity with Black Lives Matter and with all who are fighting for an equitable and just future. These are SOMAH's driving principles, a program that exists, thanks, in large part, to the advocacy of frontline communities striving for energy equity and environmental justice. We remain steadfast in our commitment to equity through a community-based approach that amplifies the voices of frontline communities and ensures we listen to and are responsive to the communities the program serves through public forums, direct outreach and education.

# SOMAH in solidarity with our CBO Partners



## Love our People, Heal our Community:

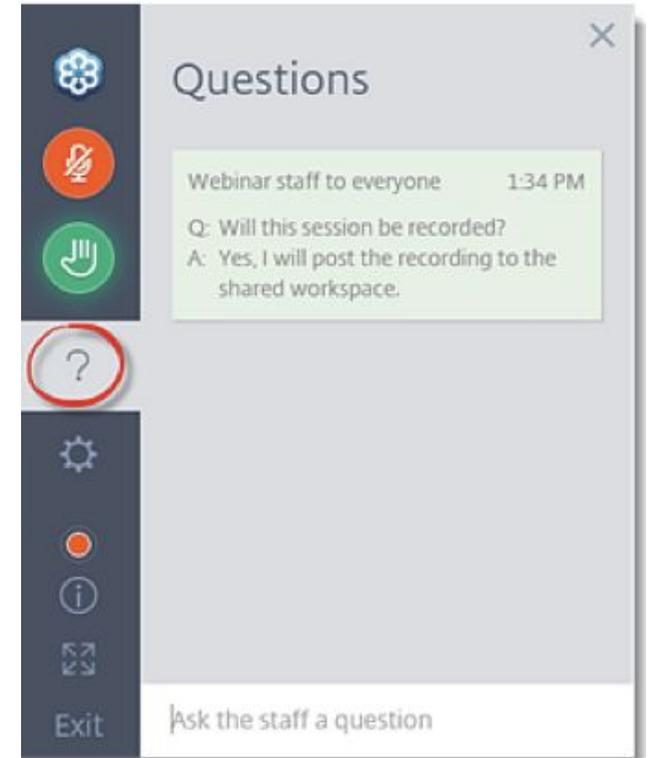
We condemn the violence against California's Asian communities and support the call to action by our SOMAH community-based organization (CBO) partners at Asian Pacific Environmental Network (APEN) for investment in long-term, community-centered solutions.

For more information please visit [stopaaphate.org](https://stopaaphate.org)

# Welcome & Introductions

## Meeting Guidelines

- Q&A will follow after each session
- Verbal comments and questions
  - Muted by default; use the hand-raising feature to be unmuted
  - Please say your name and organization
  - To allow the PA to respond, please ask questions or make comments one at a time
- Written comments and questions
  - Use the chat box or to write in your comment or question



# Welcome & Introductions

## Access & Follow Up

- Forum is recorded but not publicly available
- This slide deck will be emailed and posted to CalSOMAH.org next week
- Notes will be compiled and edited for release within five (5) business days
- Additional questions and comments:  
[contact@CalSOMAH.org](mailto:contact@CalSOMAH.org) (858-244-1177, ext. 5)

# Welcome & Introductions

## SOMAH Program Administrator Team



### Program Administration

**Jae Berg** | SOMAH Program Manager

**Chris Walker** | SOMAH Program Manager

**Hannah Warner** | SOMAH Program Manager

**Marisa Villarreal** | SOMAH Program Manager

**Luke Ballweber** | SOMAH Program Manager

**Laura Wong** | SOMAH Program Manager

**Jaimie Joo** | SOMAH Program Coordinator

**Valery Franco** | SOMAH Program Coordinator

**Victoria Leslie** | SOMAH Program Coordinator

**Bonnie Roberts** | SOMAH Field Inspector

### Technical Assistance

**Sarah Hill** | SOMAH Program Manager

**Staci Givens** | SOMAH Program Manager

**Luis Amar** | SOMAH Technical Assistance Specialist

**Zara Jamshed** | SOMAH Technical Assistance Specialist

### Workforce Development

**Staci Hoell** | SOMAH Workforce Development Manager

**Ingrid Murillo** | SOMAH Workforce Development Coordinator

# Welcome & Introductions

## SOMAH Program Administrator Team



### Marketing, Education & Outreach

**Brittany Chenier** | SOMAH ME&O Manager

**Vallerie Gonzalez** | SOMAH ME&O Manager

**Kajsa Hendrickson** | SOMAH ME&O Manager

**Poolak Forutanpour** | SOMAH ME&O Manager

**Margee McDonnell** | SOMAH ME&O Coordinator

**Omar Rocha** | SOMAH ME&O Coordinator

**Lucy Moua** | SOMAH ME&O Coordinator

**Mai Fang** | SOMAH ME&O Coordinator

**Sarah Salem** | SOMAH Senior Tenant Services & CBO Manager

**Sana Sheikholeslami** | SOMAH Tenant Services & CBO Coordinator

**Blanca de la Cruz** | Sustainable Housing Program Director, CA Housing Partnership

**Rachael Diaz** | Sustainable Housing Program Associate, California Housing Partnership

# Honoring Black History Month & Black Contributions to the Environmental Movement



In honor of Black History and Black Futures Month, the SOMAH PA celebrates the Black individuals and communities throughout history who continue to advance the environmental movement forward -- from environmental justice advocates and community leaders and members, to renewable energy leaders and engineers, farmers and agriculturalists, naturalists and scientists.

We encourage everyone to reflect on the history and contribution of the Black community not just during the month of February but every day.

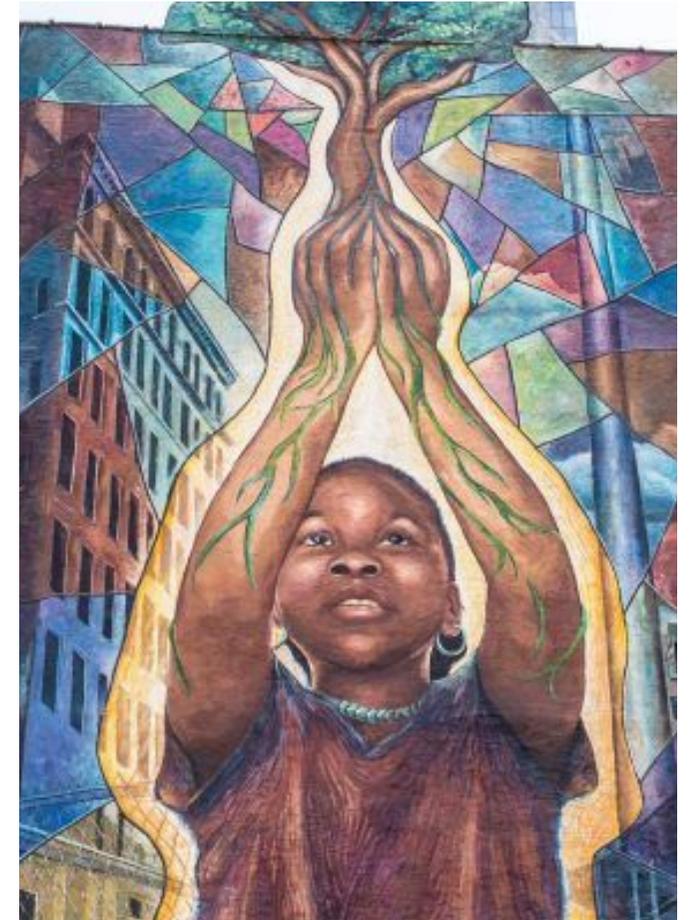


Image: [Mural Arts Program Philadelphia](#)

# Session 1: SOMAH Program Update - 2021 Accomplishments & 2022 Priorities



Jaimie Joo

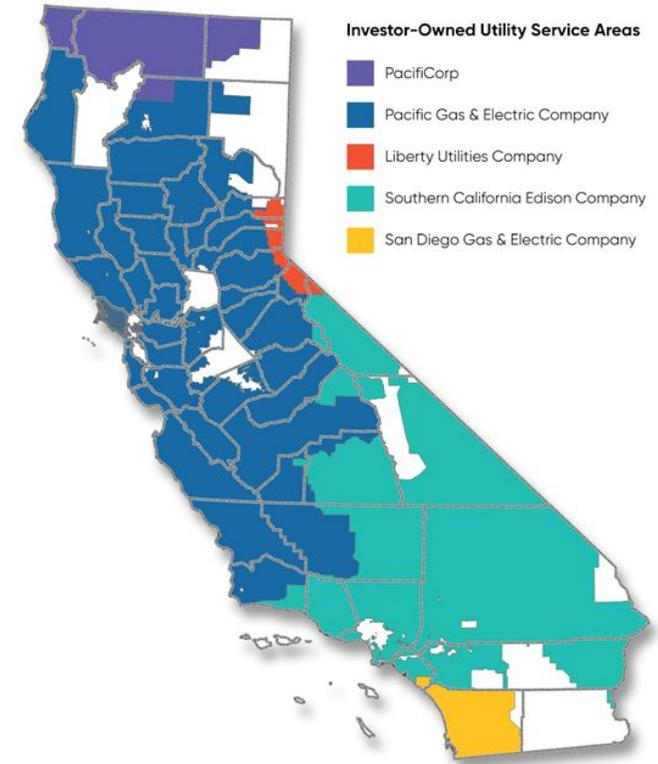


# Session 1: SOMAH Program Update

## Application Breakdown



| Utility Territory          | # of Active Applications |
|----------------------------|--------------------------|
| Pacific Gas & Electric     | 267                      |
| Southern California Edison | 149                      |
| San Diego Gas & Electric   | 54                       |
| PacifiCorp                 | 1                        |
| Liberty Utilities          | 2                        |
| <b>Totals</b>              | <b>473</b>               |



# Session 1: SOMAH Program Update

## Where We Are Today



*All territories are open to new applications with no waitlists*

| Utility           | Available Funding |
|-------------------|-------------------|
| Liberty Utilities | ~\$1,470,907      |
| PacifiCorp        | ~\$5,596,771      |
| PG&E              | ~\$89,640,649     |
| SCE               | ~\$135,712,800    |
| SDG&E             | ~\$29,275,940     |

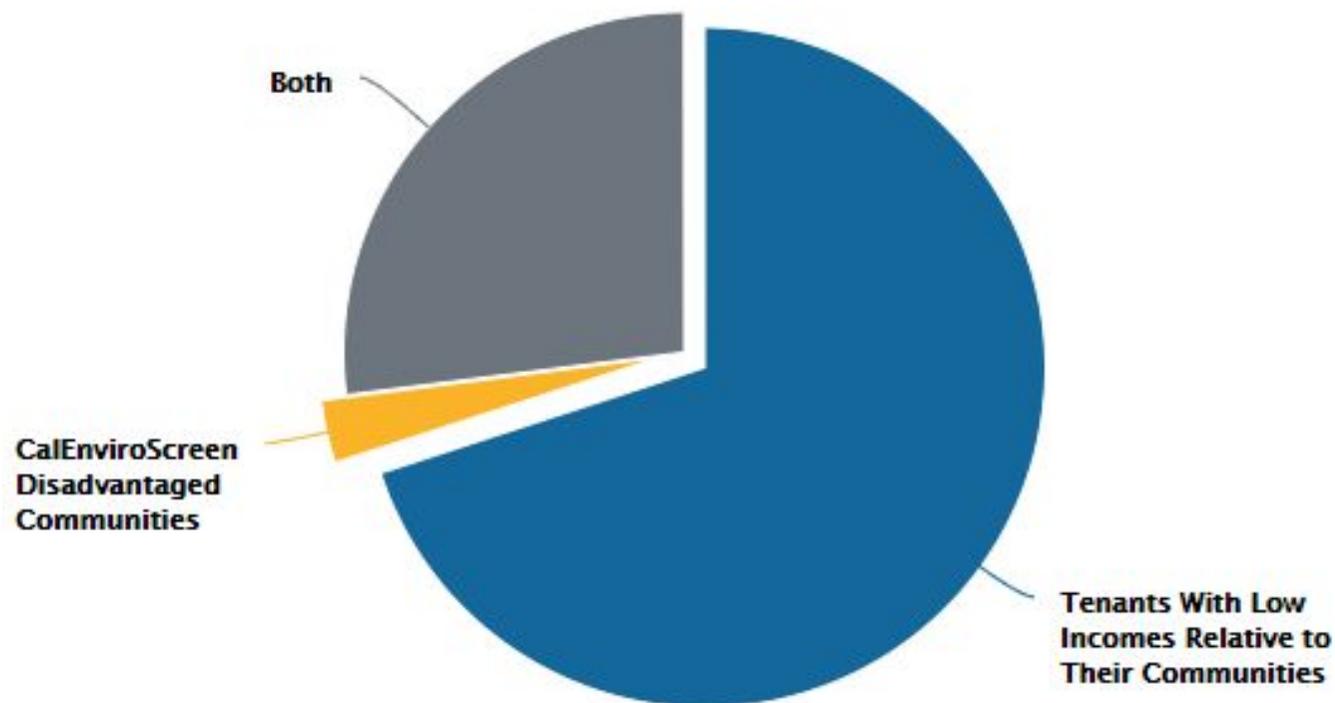
- **\$172.7 million** in funding that's already been reserved
- **\$261.6 million** funding remaining

# Session 1: SOMAH Program Update

## Where We Are Today



- **34%** of SOMAH's active applications are located in Disadvantaged Communities (DACs)\*
- Tenants are slated to receive **~88%** of the electricity generated from SOMAH installations



\*DACs are defined as “the top 25% scoring areas from [CalEnviroScreen](#) along with other areas with high amounts of pollution and low populations” SB 535

## Session 1: SOMAH Program Update

# Additional Program Statistics

- Serving **38,471** tenant units
- Average system size: **174** kW
- 13 participating contractors
  - **10** subcontractors reported
- Pipeline supports **881** job training opportunities
  - Nearly **59,000** projected training hours
  - Approx. **\$1.2M+** in projected wages
  - Leveraging over **60** job training organization relationships



# Session 1: SOMAH Program Update

## Application Statistics



- Progress Payments
  - 141 projects currently eligible for Progress Payments
  - 13 progress payments issued (\$2,984,355.60)
  - 1 under review
- Incentive Claims
  - 16 final incentive payments issued (\$5,056,879)
  - 14 close behind at Incentive Claim Milestone, inspection, and pending payment
- Upcoming activity
  - 19 projects have upcoming incentive claim due dates in Q1 2022
  - 204 projects with incentive claim due dates in Q2 & Q3 2022

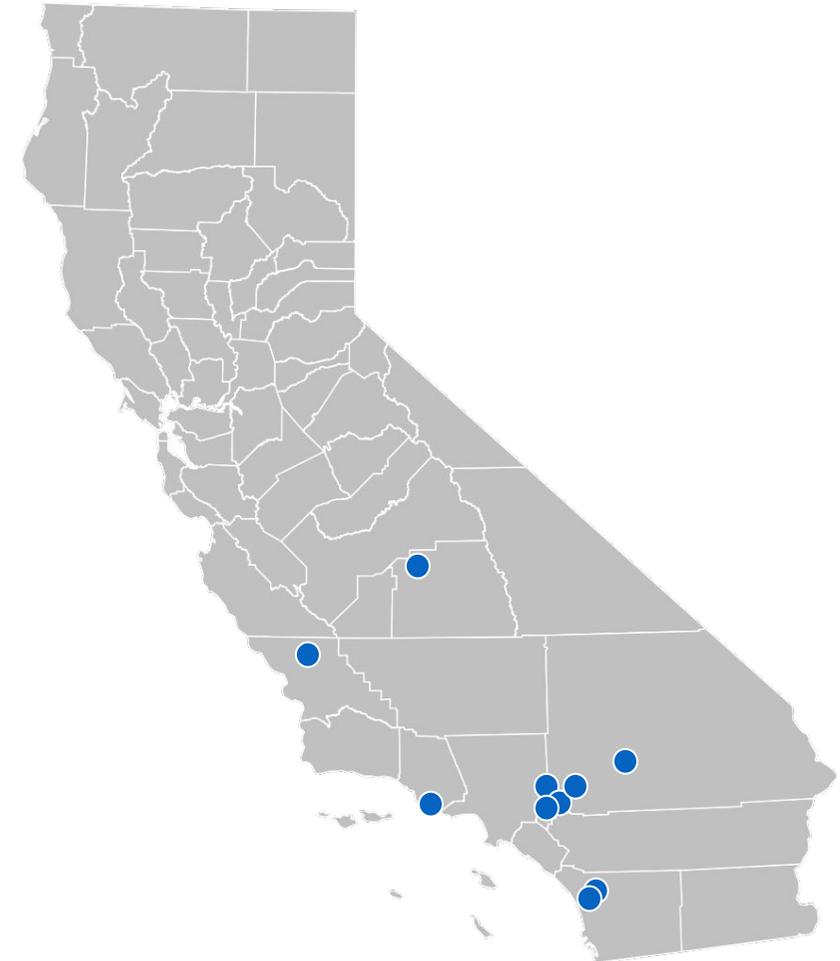
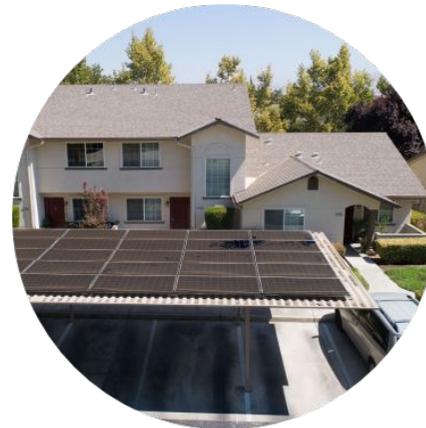


# Session 1: SOMAH Program Update

## Completed Projects



**16** completed projects, with **3.2** MW of electricity serving over **1,603** tenant units across the state!



# Session 1: SOMAH Program Update

# SOMAH Resources - Eligible Properties Map **\*UPDATED\***

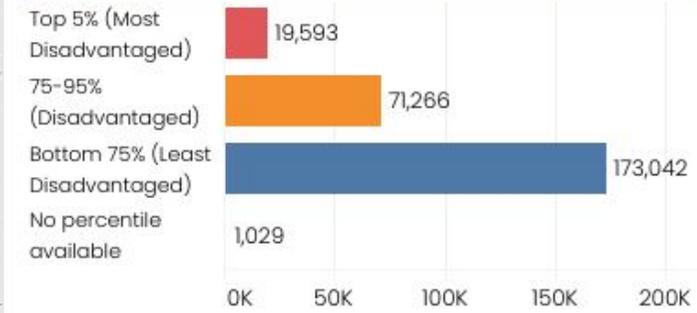
## Property Locations and Disadvantaged Communities



The [5] Property Locations by [1] Disadvantaged Community map displays the location of properties eligible for the SOMAH program. The color shows details about Disadvantaged Community (DAC) Census Tracts, which are defined based on CalEnviroScreen 3.0 criteria.

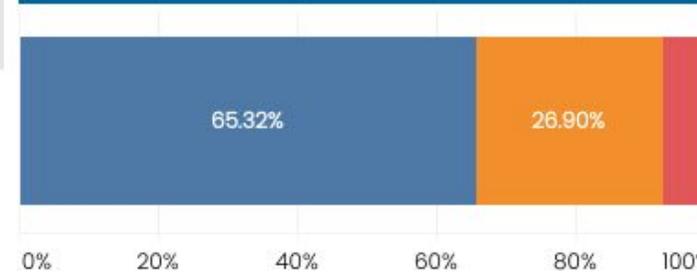
Communities

## Affordable Housing Units by Disadvantaged Community



This chart shows the number of affordable housing units by disadvantaged community status.

## Percent of Total Based on Filter Criteria



## Affordable Housing Units [7] by Street Address



Visit: [Calsomah.org/eligible-somah-properties-map](https://calsomah.org/eligible-somah-properties-map)

## Session 1: SOMAH Program Update

# Other Program Updates & Announcements

- **SOMAH Program Handbook Update**
  - Filed Feb 15, 2022
  - Substantive updates include:
    - Application deposit waiver for priority applications (i.e. DACs)
    - DACs benchmark (40% by 2026)
    - Code of Conduct
    - Compliance with Job Training & Tenant Ed. Requirements
    - CalEnviroscreen 3.0 to 4.0

## Other Program Updates & Announcements

- **SOMAH Program Handbook Update**
  - Some minor updates include:
    - Removal of PPM Checklist submittal requirement
    - Return of app deposit
    - Grounds for program recourse
    - Fleet monitoring
  - Next steps: Protest and response period through Mar 7, 2022

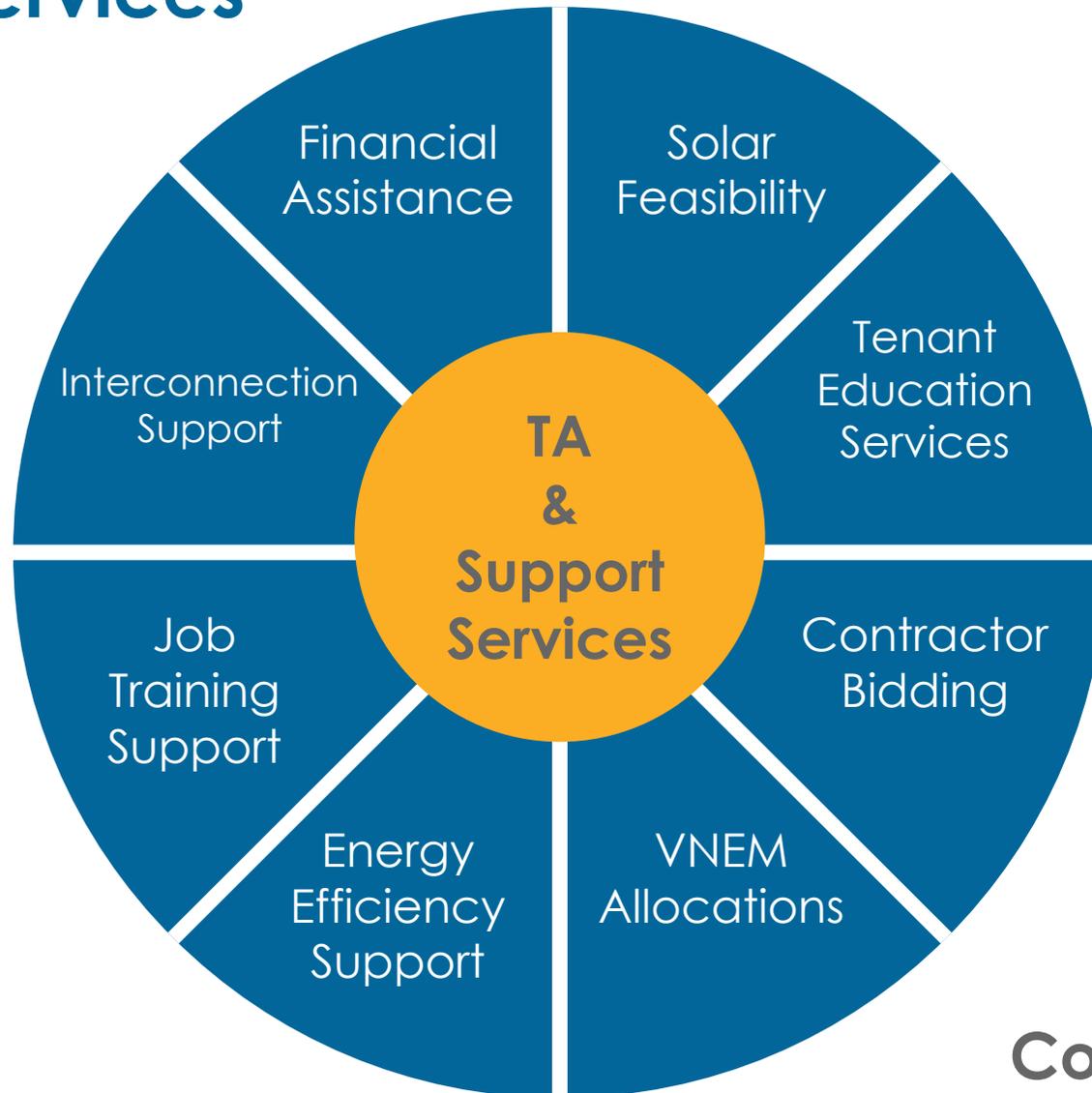
## Session 1: SOMAH Program Update

# 2022 ME&O Plan Updates

- 2022 ME&O Plan is being finalized, will be posted to CalDGStats website
- Goals intended to be accomplished through objectives & activities
- Development informed via:
  - Research and evaluation
  - Lessons learned
  - Partner feedback (CBOs, JTO Taskforce, Advisory Council)
  - Public comment period

# Session 1: SOMAH Program Update

## **SOMAH Resources - Suite of TA & Support Services**



**TA & Support Services helps you navigate the program and provides:**

- Equal access to SOMAH benefits
- Education and access to resources
- Overcome challenging barriers
- Program, technical, and financial support

**Contact: [TechAssist@CalSOMAH.org](mailto:TechAssist@CalSOMAH.org)**

# Session 1: SOMAH Program Update

## TA Services: SOMAH's Job Training Support

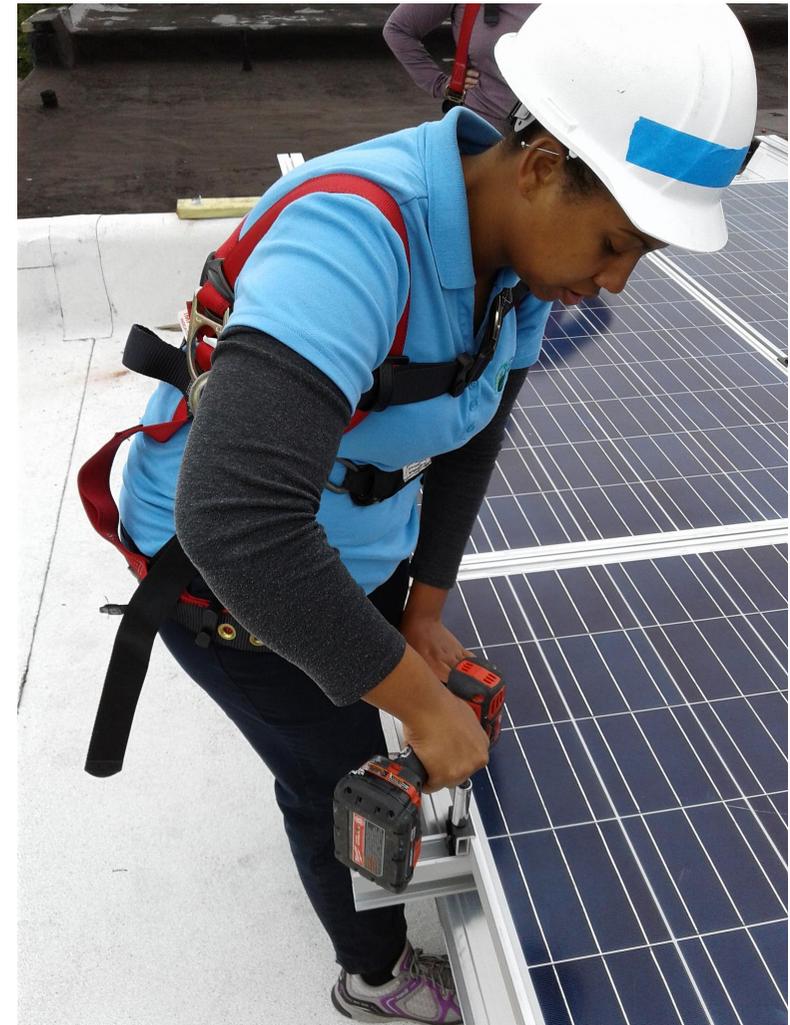


We support contractors in meeting SOMAH's job training requirements, and trainees in getting connected to solar training opportunities.

### What we provide:

- Recruitment and placement support
- Job training portal guidance
- Connection to local job training organizations
- Education and development

**Contact:** [workforce@calsomah.org](mailto:workforce@calsomah.org)



## Session 1: SOMAH Program Update

# TA Services: Tenant Education Services

Free tenant education support services to help projects reach their tenant education requirements:

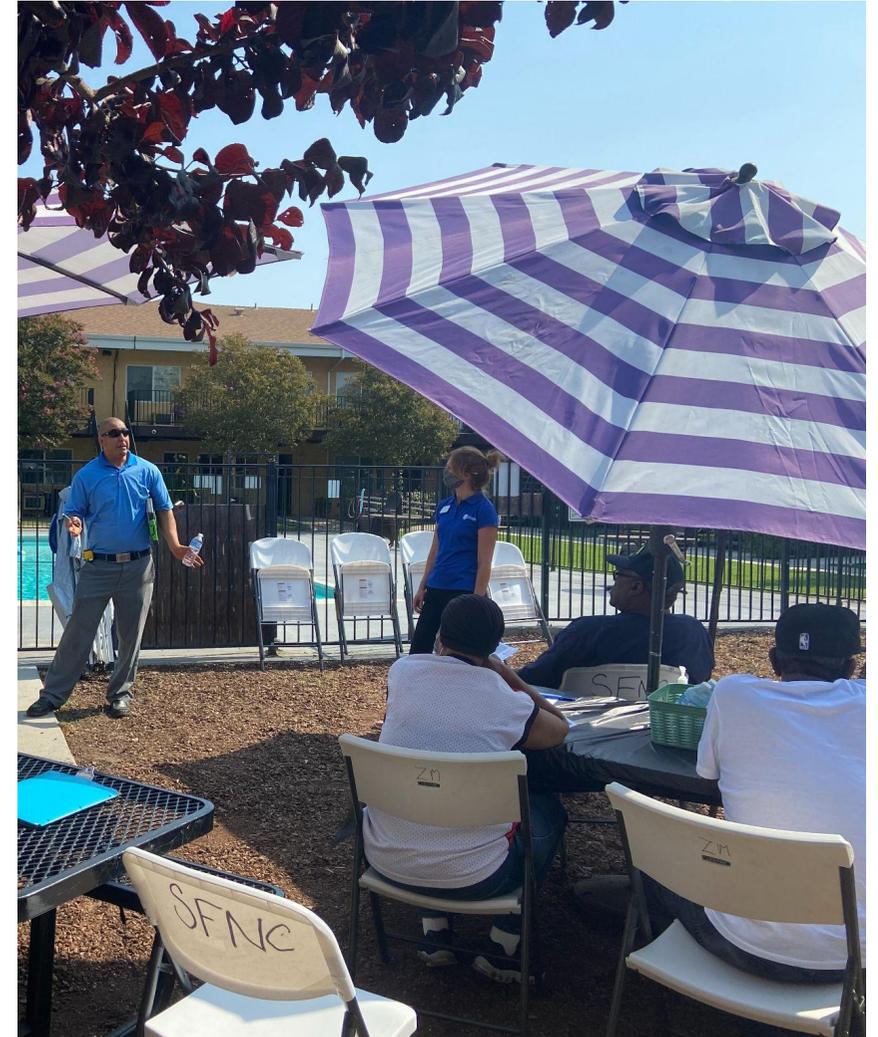
- Tenant Education Service workshops
- Tenant Education “train the trainer”
- Tenant Education 101 meeting

**Apply now at:**

**[bit.ly/SOMAH-TE-Services](https://bit.ly/SOMAH-TE-Services)**

**or contact:**

**[tenants@calsomah.org](mailto:tenants@calsomah.org)**



# Session 1: SOMAH Program Update

## Celebrating Completed Projects



### We want to celebrate solar!

As more projects complete, the SOMAH PA wants to help you celebrate with a ribbon-cutting ceremony or other event to:

- Highlight bringing solar to your community
- Raise awareness about SOMAH

We can help with planning and promotion.

**Contact:** [media@calsomah.org](mailto:media@calsomah.org)

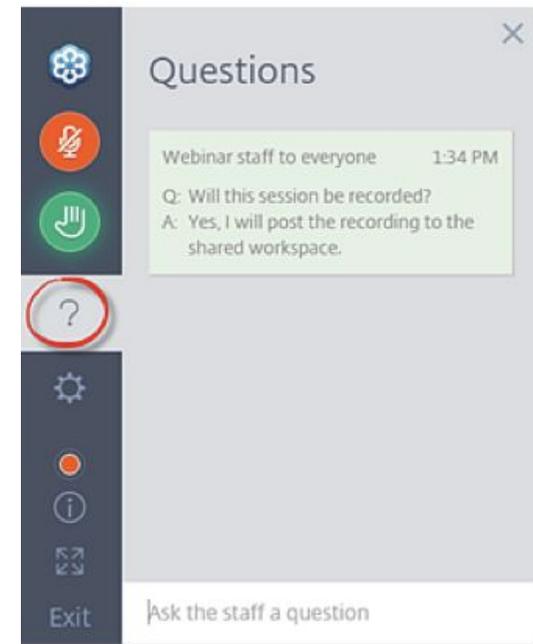


# Session 1: SOMAH Program Update

## Q&A



- Name and organization
- **Verbal** comments and questions
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# Session 2: SOMAH's Third-party Evaluation: Recommendations & Implementation



Kajsa Hendrickson & Chris Walker



# Session 2: SOMAH's Third-party Evaluation: Recommendations & Implementation Review

## Phase II: Data Collection

- Interviews & web surveys
- IOU data requests
- Impact Analysis:
  - Energy (kWh)
  - Environmental (GHG)
  - Economic (\$ bill savings)
  - Metric Assessment
- Comprehensive Final Report

Timeline: August 2020-June 2021

## Phase II: Reporting

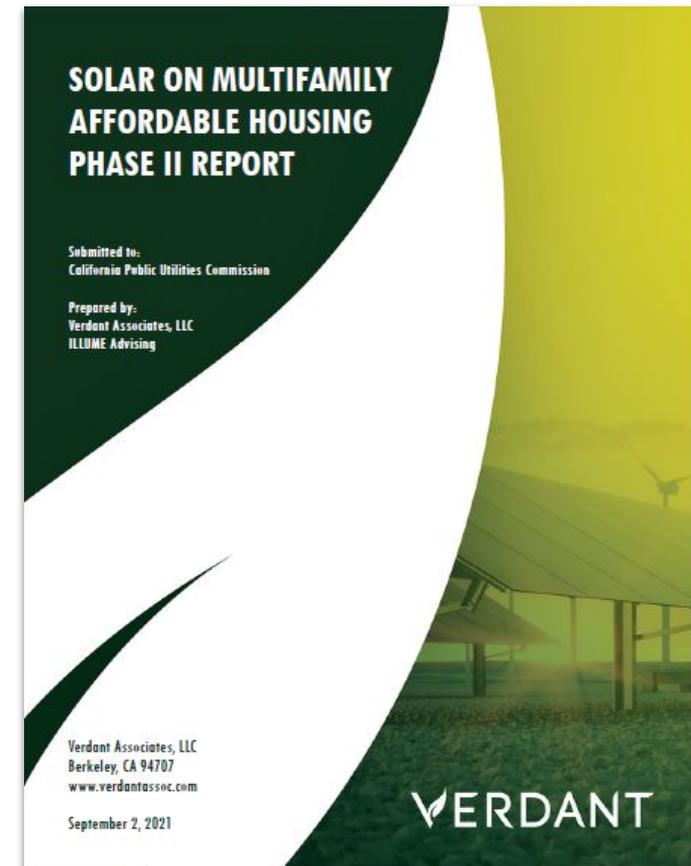
- Draft report released
- Public comments period
- Final report released
- PA & IOUs respond to report recommendations
- Final report & responses published

Timeline: September 2021 -  
February 2022

## Session 2: SOMAH's Third-party Evaluation: Recommendations & Implementation

### Where we are

- Final report contained 19 findings: 41 unique recommendations for the SOMAH PA and three IOU recommendations
- Report found here:  
<https://www.cpuc.ca.gov/somah/> under "SOMAH Evaluation Reports"
- SOMAH submitted a response to recommendations (RTR)
  - Completed public comment on 2/7/22
- Final report and comments upcoming
  - Reply comments complete 2/18



## Session 2: SOMAH's Third-party Evaluation: Recommendations & Implementation

### Key recommendations

- Remove barriers to participation for contractors and properties
- Increase support for contractors
- Expand support for property owners
- Increase SOMAH program awareness
- Program incentives



## Session 2: SOMAH's Third-party Evaluation: Recommendations & Implementation

### Remove Barriers to Participation

- Key recommendations:
  - Consider expanding property eligibility criteria
  - Increase DAC-serving contractors
  - Reduce administrative and application burden
  - Reduce financial barriers
- The SOMAH PA plans to:
  - Identify and reduce barriers to participation for contractors and properties
  - Increase outreach to and trainings for contractors that serve DACs to activate currently eligible contractors and reach additional ones
  - Review and streamline application processes
  - Research needs for and pathways to broaden eligibility to reach additional properties
  - Develop listing of bridge/gap loan providers; provide more info on third-party ownership models through TA and welcome calls

## Session 2: SOMAH's Third-party Evaluation: Recommendations & Implementation Increase Contractor Support

- Key recommendations:
  - Provide additional assistance to contractors to identify ineligible projects
  - Provide support services for application submittal
  - Increase workforce development support, especially to smaller contractors
  - Increase support for subcontractors
- The SOMAH PA plans to:
  - Implement informal eligibility review or formal pre-screening process
  - Expand technical assistance and support services for Track A and Track B projects
  - Research and identify ways to increase subcontracting opportunities
  - Review and enhance marketing materials

## Session 2: SOMAH's Third-party Evaluation: Recommendations & Implementation Expand Property Owner Support

- Key recommendations:
  - Further mitigate cancellations
  - Expand technical assistance touchpoints and services
  - Expand allowable expenses
- The SOMAH PA plans to:
  - Expand technical assistance support including more 1:1 and frequent engagement, including welcome calls
  - Provide additional support to smaller or newly participating property owners
  - Powerclerk features walkthrough (filtering and reporting)

## Session 2: SOMAH's Third-party Evaluation: Recommendations & Implementation Increase Program Awareness

- Key recommendations:
  - Enlist additional trusted messengers to co-market SOMAH
  - Utilize case studies to showcase and promote completed SOMAH project
  - Ensure sufficient co-marketing of the program with trusted organizations
  - Raise SOMAH Program awareness within city and county housing authorities
- The SOMAH PA plans to:
  - Increase outreach to and co-marketing activities with regional bodies, government entities, “ambassadors,” and CCAs
  - Generate and utilize case studies to encourage owners to participate by hearing about the experiences of other owners
  - Conduct direct outreach to active Housing Authorities that participate with TCAC
  - Focus more CBO work on owner outreach activities

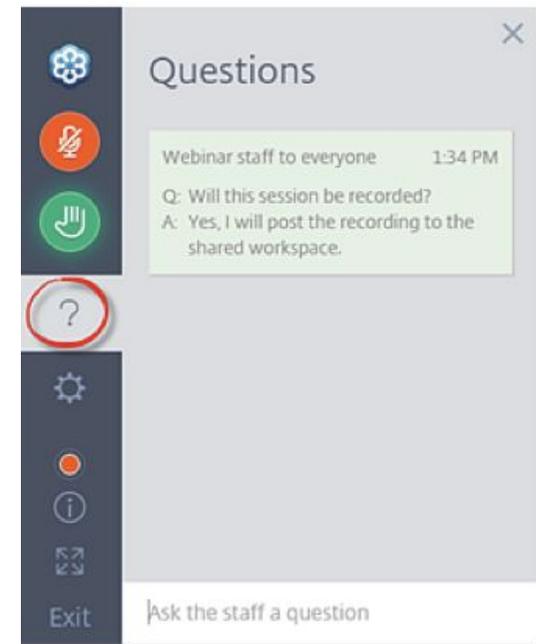
## Session 2: SOMAH's Third-party Evaluation: Recommendations & Implementation Incentives

- **Step-down:** Incentive step-down is normally slated for July 1 each year; new NREL report would mean another step-down
- **D.17-12-022:** “This incentive step-down methodology will be reviewed and may be changed in the 2020 program evaluation, if appropriate based on further cost or market information.”
- **Evaluation:** Not a market transformation program, and participants depend on incentives for this work to proceed
- **Next step:** SOMAH PA examining the financial value proposition to ensure it supports the attainment of 300 MW by the end of 2030, and will begin engaging stakeholders in Q1 in consideration of any proposed changes

## Session 2: SOMAH's Third-party Evaluation: Recommendations & Implementation

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# Wrap Up & Next Steps

Jaimie Joo



## Session 1: SOMAH Program Update

# Upcoming Events



- **March 22:** SOMAH Technical Assistance and Support Services Overview
- **March 24:** March Applicant and Contractor Eligibility Training
- **March 29:** Inclusive Hiring Practices for Solar Employers
- **May 22:** SOMAH Public Forum (Q2)
- **May 26:** May Applicant and Contractor Eligibility Training

Register at [calsomah.org/events](https://calsomah.org/events)

# Wrap Up & Next Steps

**Share Your SOMAH Experience**  
Encourage others to get involved

We're looking for:

- Participants to interview
- Photos from projects
- Stories to tell

Interested in being featured?

Contact: [contact@CalSOMAH.org](mailto:contact@CalSOMAH.org)



# Wrap Up & Next Steps

## Follow us!

For the latest news and updates about the program:

- Subscribe to our newsletter: **[calsomah.org/email-sign](https://calsomah.org/email-sign)**
- Follow/like us at @CalSOMAH on
  - [Twitter](#) | @CalSOMAH
  - [Facebook](#) | facebook.com/CalSOMAH
  - [Instagram](#) | @calsomah
  - [LinkedIn](#) | linkedin.com/company/calsomah/

## Looking Ahead & Next Steps

### What's Next?

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# Questions & Feedback



*Email: [contact@CalSOMAH.org](mailto:contact@CalSOMAH.org)*

*Web form: [CalSOMAH.org/contact-us](https://CalSOMAH.org/contact-us)*

*General hotline: 858-244-1177 ext. 5*

*Tenant hotline: 800-843-9728*



Thank you!



# Why does environmental justice matter?

People of color and low income communities are living, working, and playing in the country's most polluted environments.



Figure 4: Fraction of Each Racial/Ethnic Group Living in the Top 20% Census Tracts.

## Program Priorities for 2022



# Session 1: SOMAH Program Update

## Goals & Priorities for 2022



1. To increase the program pipeline
2. Measure and increase participation by underserved communities
3. Increase participant diversity



# Session 1: SOMAH Program Update

## Goals & Priorities for 2022



## 2. Measure and increase participation by underserved communities

*Housing in DACs, Farmworker Housing, Tribal Housing*

- a. Handbook 5.0 updates: Formalized DAC goal and application deposit waivers (*Jan 2022 submittal*)
- b. Focused ME&O efforts (*direct outreach, co-marketing, targeted ads + campaigns*)

**NEW DACs Goal: 40% of participating properties by 2026**

# Session 1: SOMAH Program Update

## Goals & Priorities for 2022



### 3. Increase participant diversity:

- a. Reevaluate & expand program services (*App support & Technical Assistance*)
- b. Continued participant research (*surveys, focus groups*)
- c. Focused ME&O efforts (*direct outreach, co-marketing, targeted ads + campaigns*)

## Session 1: SOMAH Program Update

# 2022 ME&O Plan - Goals

1. Engage **property owners** to build and maintain a multiyear **pipeline of diverse projects**
2. Continue to build a robust and **diverse contractor base** and support eligible contractor retention
3. Ensure **sufficient job trainee participation and preparation** for SOMAH job training opportunities or relevant careers
4. **Educate SOMAH-eligible tenants and tenants living in participating SOMAH properties** about the program and how to maximize their benefits
5. Ensure stakeholders are **informed of and helping to co-market** the program

Draft 2022 ME&O Plan will be shared early 2022 for public comment/review

# Session 2: Spotlight on SOMAH's Support Services

## Tenant Education Services: What to expect



- **Personalized** tenant education workshop
- **Support** from the SOMAH PA and your local CBO partner
- **Free** service for any project that has received a Proof of Project Milestone approval



## Session 1: SOMAH Program Update

# Other 2021 Highlights

- **10 incentive payments** have been disbursed (\$3.4 million)
- First participants leverage **progress payments**
- Second **Advisory Council Cohort** (returning & new members)
- First **ribbon-cutting** in Orosi, CA
- First **tenant services** workshops in Stockton, CA
- **2 listening sessions** for community-based organizations
- **Contractor focus group sessions** (DAC property owner focus group coming later this year)
- SOMAH **third-party evaluation** is complete!

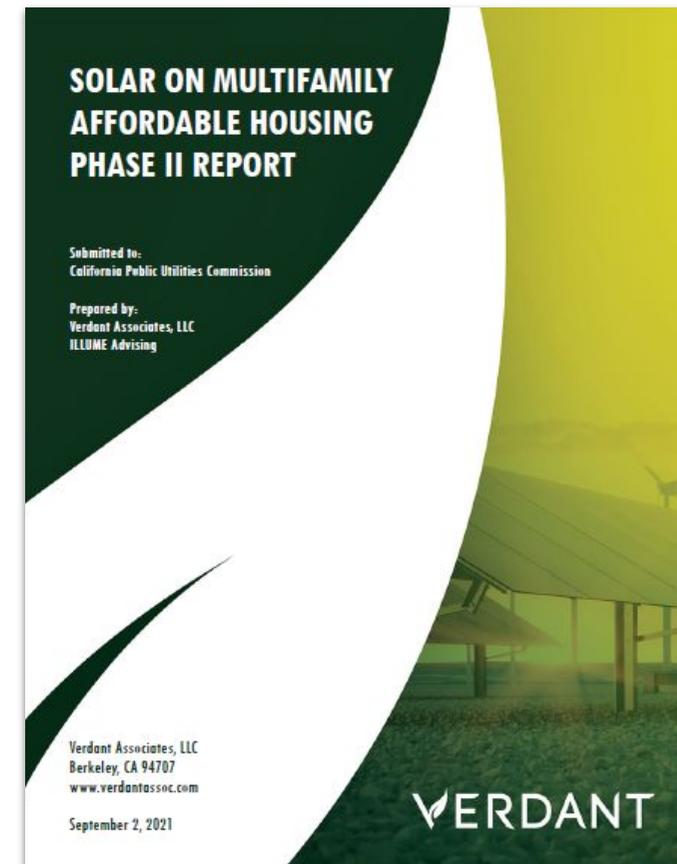


# Session 1: SOMAH Program Update

## Program Evaluation Updates



- SOMAH's Third-Party Evaluator released the final evaluation report in 2021
- Will have a larger report-out on actions on recommendations in Q1 2022
- Report found here <https://www.cpuc.ca.gov/somah/> under "SOMAH Evaluation Reports"



## Session 1: SOMAH Program Update

# COVID's continued impacts

- Q2 2021: surveyed SOMAH participants about COVID impact, presented in forum
- Impact of COVID-19 pandemic on SOMAH project installations
  - **74.6%** indicated COVID-19 impacted their operations
  - **61.5%** indicated that their operations were slowed significantly by COVID-19
- Top areas of installation impacted:
  - Staff capacity constraints - **90%**
  - Reduced cash flow - **90%**
  - Permitting delays - **54%**

## Poll:

**Are you still feeling the impacts of COVID-19?**



## Sand Creek Apartments Orosi, CA

- 60 units
- 128kW



## Session 2: Spotlight on SOMAH's Support Services

# SOMAH's Job Training Support - What to expect



### How it works:

- Contact the SOMAH PA *well in advance* for support.
- Enter the training opportunity on the Job Training Portal **at least 60 days before construction begins.**
- We contact local job training organizations and pass along eligible candidates to the contractor/hiring manager.
  - *We can also support with recruiting tenants.*
- Contractor contacts, interviews, and selects trainees.

## Session 2: Spotlight on SOMAH's Support Services

### So far, we've had some great success

- Connected nearly **80** eligible job trainees to contractors
- Contractors have reported hiring **3** job trainees for their permanent workforce.
- One tenant has participated as a job trainee.
- Over **80%** of SOMAH's hired trainees are priority or targeted hires



## Session 2: Spotlight on SOMAH's Support Services

# Support for job-seekers



- Career development events and resources
  - **Past events:** Solar Career Pathways, Resume Workshop, Interview Workshop
  - **Dec. 16:** Know Your Employment Rights Training
  - **Upcoming resources:** Monthly newsletter, online training courses
- JTO Directory - Connection to job training programs to kick-start your solar career journey
- Job Training Portal - Connection to employers



# Tenant Requirements

## TWO TENANT AFFIDAVITS:

1. Affidavit Ensuring 100 Percent Tenant Economic Benefit
2. Affidavit Ensuring Tenant Education



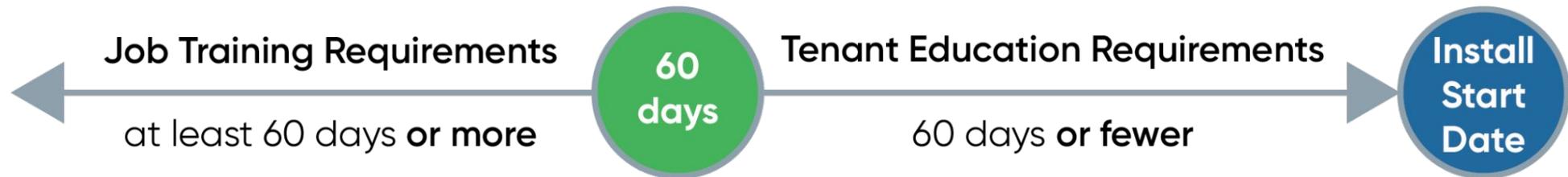
# Session 2: Spotlight on SOMAH's Support Services

## Tenant Education Requirements

Tenant Education Requirements:

Provided SOMAH approved education materials to all tenants 60 days or fewer prior to the start of construction.

- #1
  - a. Direct delivery to residence OR
  - b. Mailer sent via U.S. Postal Service
- #2: at least one or more of the following
  - a. Email notification
  - b. Tenant meeting/workshop
  - c. Other:



# Session 2: Spotlight on SOMAH's Support Services

## Tenant Education Services: What to expect



### 1. Submit:

- Tenant Services Intake Form
- Apply as early as you would like, ideally **60 days or more** before install

### 2. Consider | Create | Collaborate:

- Follow up email or call
- Identify needs and specifics
- Finalize workshop details

### 3. Implement:

- SOMAH Tenant Services team conducts workshop!



## Session 2: Spotlight on SOMAH's Support Services Tenant Education Services Coventry Apartments | Stockton, CA

### Project Highlights:

- Coordinated with contractor & on-site manager
- 4 outdoor workshops over 3 days
- Workshop topics:
  - SOMAH overview
  - Job training
  - Youth activities
  - Special needs



# Session 2: Spotlight on SOMAH's Support Services Tenant Education Services Coventry Apartments | Stockton, CA



Welcome Ms. Anissa Bailey!

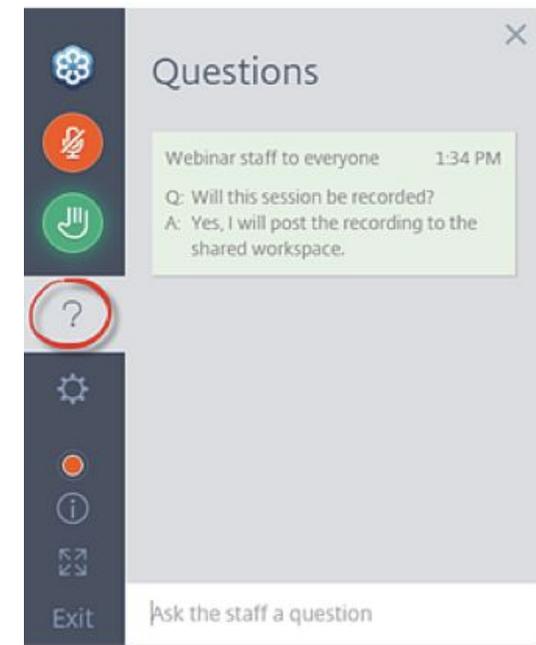


## Session 2: Making the most of SOMAH's TA Services

# Discussion/Q&A



- Name and organization
- **Verbal** comments and questions
  - You are muted by default; use the hand-raising feature if you'd like to be unmuted to speak verbally
  - To allow the PA to respond to each question, ask one question or make one comment at a time
- **Written** comments and questions
  - Use the chat box to write in your comment or question



# Job Training

A photograph of two construction workers at a workbench. The worker on the left is wearing a blue hard hat, safety glasses, and a high-visibility yellow vest over a white long-sleeved shirt. The worker on the right is wearing a white hard hat, safety glasses, and a grey hoodie. They are both looking down at a set of plans on the workbench. A yellow measuring tape is stretched across the plans. A circular saw is visible in the foreground on the left. The background shows a construction site with wooden framing and a yellow ladder.

SOMAH contractors are required to hire and pay **1-2 job trainees** for each SOMAH project for positions in:

- Project design/engineering
- PV installation
- PV commissioning and maintenance