

SOMAH Public Forum Notes

Date: Wednesday, June 2, 2021

Time: 1-2:30pm

Purpose:

The purpose of the SOMAH Public Forum is to share program progress and updates while creating an opportunity for program stakeholders and participants to ask questions, share concerns and provide feedback. This forum will provide an update on key program stats and an overview of the recently approved Handbook 4.0 as well as the PA's efforts to increase DAC participation.

The forum is suited for multifamily affordable housing property owners, solar contractors, community-based organizations (affordable housing, environmental justice, tenants' rights, etc.), investor-owned utilities, community choice aggregators and job training organizations interested in getting program updates and providing feedback to the SOMAH Program Administrator.

Welcome & Introductions

Vallerie Gonzalez, SOMAH Marketing, Education and Outreach Manager, gave an overview of the purpose of the forum, agenda, and introduced members of the SOMAH Program Administrator Team (SOMAH PA). Kajsa began by stating that SOMAH stands in solidarity with Black Lives Matter and with all who are fighting for a just and equitable future. Further acknowledgements continued for standing in solidarity with SOMAH's CBO partners like Asian Pacific Environmental Network (APEN), condemning the violence against California's Asian communities. The introduction concluded with honoring Pride Month, acknowledging that queer wisdom, knowledge, and power are critical to fighting and surviving the climate crisis.

Session 1: Program Update

Kajsa Hendrickson and Sarah Hill, SOMAH Program Managers, gave a rundown of program updates and general announcements.

Sarah began with an overview of application statistics and a funding update that incentive funds are currently available in all five program territories with no waitlists.

Utility Territory	# of Active Applications
Pacific Gas & Electric	221
Southern California Edison	120
San Diego Gas & Electric	57
Liberty	1
PacifiCorps	2
Totals	401

The PA is proud to report 29% active applications are located in DACs, which continues to be a targeted focus of the SOMAH Program. Additionally, tenants are slated to receive 87% of the electricity generated from SOMAH installations. Both of these metrics have held steady through 2021. The active applications are slated to serve more than 32,000 tenants with an average system size of 168 kW. The pipeline also supports nearly 760 training opportunities with 52,000 projected training hours.

Kajsa introduced the recently revised (Spring 2021) [Eligible Properties Map](#) and provided a live demonstration of how the map works. She also made an important disclaimer that the map includes properties that are *likely eligible* for SOMAH and does not guarantee the property is an eligible SOMAH project. The map has a wealth of information with dynamic filters that allows the user to filter and search by street addresses, zip codes, utility territories, legislative districts, and climate zones. The map was designed for use by SOMAH participants and generally solar contractors. The map is refreshed quarterly with the most recent data for properties statewide with no personally identifiable information. There are a few map updates on the horizon for later in 2021 including a county search option, congressional overlay, total property count based on filters, and % of applications based on filters.

Kajsa continued with an update on job training resources and expectations with an emphasis on jobsite safety. She acknowledged the PA has received several complaints from job trainees and their job training organizations and that the PA takes these concerns very seriously. The PA has discussed these issues both internally and with key program stakeholders including the SOMAH Advisory Council, the Job Training Organization Task Force, the CPUC Energy Division, and our Community-Based Organization partners. The SOMAH PA has begun exploring trainings and resources which may include:

- Code of conduct for all participants
- “Know Your Rights” training for trainees

- Online safety training for job trainees
- Comprehensive solar jobsite safety guide
- Trainee feedback collection including surveys, reporting

Upcoming job training events were also highlighted:

- Job trainee event: Negotiation Workshop - July (date TBD)
- Contractor event: Job Training Webinar for Contractors - July 20

Kajsa also provided a tenant education update highlighting new services launched. The SOMAH PA offers a personalized tenant education workshop, support from the PA and local CBO partner, and free service for any project that has received a Proof of Project Milestone approval. Interested parties can apply now through this [link](#).

Sarah shared an incentive step-down update noting that the NREL report used to determine the % of the incentive step-down has not been released yet. As a result, the SOMAH PA has requested and received approval from the CPUC for an extension to the step-down for 120 days from July 1st (October 29, 2021).

Sarah concluded with an update on COVID -19 impacts and updates, giving a brief overview of the pandemic's impacts on SOMAH project installations. She also advised that the SOMAH PA is ending the option to postpone the Energy Efficiency Compliance Milestone (EECM) effective September 13, 2021. This timeline is tied to 90 days after the reopening of California (June 15th). The PA will continue to honor any projects that are approved for EECM postponement with no impacts to those project timelines.

Session 1 Q&A:

Q: Richard Esteves, QCSCA: Where can we find a listing of the complexes that have already enrolled in the SOMAH program? Can the data be downloaded as a spreadsheet or in written form?

A: Use the active SOMAH applications filter. Will add completed project filters which will be particularly useful with more completed projects forthcoming. The data is not available for spreadsheet download at this time, but the PA is working on adding a data download feature.

Q: Ray Enriquez, Solar Pro: Do you have any practice applications we can use before we actually submit an application?

No practice but training and assistance that can be provided. New contractors are required to go through Eligibility Training, all sample forms are available on the SOMAH website. Additional questions can be addressed during a 1x1 meeting with the PA, once an application is submitted we can provide direct assistance and walk applicants through the process at each milestone. The next Applicant and Contractor training will

be held on July 8.

Q: Richard Esteves, QCSCA: Could you please explain the EECM requirement. Is this similar to the ESA program participation?

A: After the project is reserved, 60 days after Reservation Approval the EECM is due. Provide information to the property owners about EE prior to installing solar on the building. Whole building energy audit is required if not enrolled in a EE program within the past year as well as working through the Solar Sizing Tool, developed by the SOMAH PA.

Session 2: Program Changes

Jae Berg and Chris Walker, SOMAH Program Managers, shared a closer look at recent program changes and what is on the horizon for the SOMAH program. Jae shared the changes in summary for Handbook 4.0 (approved May 2021), with an overview of the updates as substantive changes and minor revisions.

Substantive Changes

- Application Pipeline Management (Lottery)
- Required Notification for Early Job Trainee Termination
- System Changes Affecting Incentive Amounts

Minor Revisions

- Wage requirement (contract vs. subcontractor)
- Required job posting timeline
- Tenant education requirements
- Energy Efficiency Compliance Milestone (EECM) Lookback
- Electronic incentive payments
- Grounds for SOMAH incentive payment clawback
- Affidavit Ensuring Income Level Compliance
- Cover sheet for Multifamily Low-Income Housing Documentation
- Ineligible Multifamily Housing Properties

Chris then provided additional information about the SOMAH PA's efforts to increase CalEnviroScreen DACs participation. The PA has shared interest in expanding DAC participants and driving engagement past parity along with the CPUC and CBO partners. Chris highlighted the PA's goals to reach all owners in DACs and focus on targeted hiring with at least 50% of JT opportunities to DAC residents. The PA added an additional CBO partner in the Central Valley last year and is exploring a Tier 2 partnership that is to be announced.

Chris reported on the stakeholder engagement round DAC participation that the PA has been working on, with specific outreach to the SOMAH Advisory Council, CBO partners and Disadvantaged Communities Advisory Group (DAC-AG). From these

efforts the PA has determined general support for public goals/benchmarks for DACs participation rather than a formal carve-out (program change).

Session 2 Q&A:

Q: Ray Enriquez, Solar Pro: Can you explain the SOMAH payment structure?

A: SOMAH has two options for the incentive payment. 1) standard payment option - lump sum payment for the full incentive at the end of the application process once the system is fully installed, interconnected, and inspected by the SOMAH PA. 2) Progress Payment Payway - recently rolled out, applicants can opt to receive partial payment after the system has been fully installed and received the Proof of Project Milestone Approval, but the system has not yet received interconnection. The PA will complete a virtual walkthrough before issuing a 60% progress payment based on the total incentive amount. The remaining 40% will be issued after interconnection, Incentive Claim, and on-site inspection by the PA.

Q: Ray Enriquez, Solar Pro: How many projects can one applicant have?

A: There aren't any restrictions on the number of applications an applicant can submit for the SOMAH program at this time. There is no developer cap or MW cap for participating in the program.

Q: Ray Enriquez, Solar Pro: Can we be paid via Track B or does the money go to the property owner?

A: Track A or Track B projects have the Payee determined by the participants. The payment is typically tied to the contract agreement, but the PA will process the payment based on the Payee listed on the Incentive Claim form that is signed off by all parties.

Looking Ahead & Next Steps

Vallerie Gonzalez provided an overview of next steps, noting the Public Forum slide deck would be emailed to registered participants on CalSOMAH.org. Public Forum notes would follow in a week's time.

The following dates were shared for future events:

- Tenant Education Webinar: June 22 at 11am.
- Inspections Overview: June 30 at 10am
- Applicant and Contractor Eligibility Training: July 8 at 10 a.m.

Vallerie also shared a call to action for participants to be the face of SOMAH. The PA is soliciting feedback and looking for participants to interview, photos from projects, and stories to tell about their SOMAH experience. Interested parties should email contact@CalSOMAH.org.

For additional questions and feedback, please contact the SOMAH PA:

Email: contact@CalSOMAH.org

Web form: CalSOMAH.org/contact-us

General hotline: 858-244-1177 ext. 5

Tenant hotline: 800-843-9728