PUBLIC FORUM: February 18, 2021
Welcome & Introductions

Agenda Overview

1:05 - 1:10  Welcome, Opening Statements, & Introductions

1:10 - 1:20  Session 1: Program Update, Q&A

1:20 - 1:55  Session 2: New Application Payment Pathway: Progress Payments, Q&A

1:55 - 2:00  Looking Ahead & Next Steps
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. To learn more about how to support Asian American Communities visit Chinese for Affirmative Action to understand their three demands for action from local leaders.
SOMAH in solidarity with our CBO Partners

Chevron Oil Spill:

On Tuesday, Feb. 9, 2021, the Richmond, CA community experienced an environmental disaster when Chevron spilled 600 gallons of petroleum into the Bay, poisoning the Point Richmond shoreline. Chevron provided no emergency alert or warning to the community. CBO APEN organizers spent hours calling family, friends, neighbors, and members to warn them about the oil spill and to avoid Point Richmond and surrounding beaches. This area is where some in the SOMAH communities we serve live, work, go to school, and fish. This emphasizes California’s urgent need to create clean air and a healthy environment where all people can thrive.

Take action and join APEN on Feb. 23 and demand that Chevron be held accountable and enforce the strongest refinery rule to reduce their toxic pollution.

Sign up here: https://forms.gle/bLHSeZavzoQmhjHK7
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 (by 2/25/21)
- Additional questions and comments: 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
Alexandra Patey | SOMAH Program Manager
Marisa Villarreal | SOMAH Program Manager
Luke Ballweber | SOMAH Program Coordinator
Laura Wong | SOMAH Program Coordinator
Jaimie Joo | SOMAH Program Rebate Processing Specialist

Technical Assistance

Nick Dirr | SOMAH Program Manager
Sarah Hill | SOMAH Program Manager
Luis Amar | SOMAH Technical Assistance Coordinator
Zara Jamshed | SOMAH Technical Assistance Coordinator

Workforce Development

Staci Hoell | SOMAH Workforce Development Manager
Welcome & Introductions
SOMAH Program Administrator Team

Marketing, Education & Outreach

Valerie Gonzalez | SOMAH ME&O Manager
Kajsa Hendrickson | SOMAH ME&O Manager
Margee McDonnell | SOMAH ME&O Coordinator
Sarah Salem | SOMAH Tenant Services & CBO Manager
Sana Sheikholeslami | SOMAH Tenant Services & CBO Coordinator

Blanca de la Cruz | Sustainable Housing Program Director, CA Housing Partnership
Srinidhi Sampath Kumar | Sustainable Housing Program Manager, CA Housing Partnership
Michael Claproth | Sustainable Housing Program Associate, California Housing Partnership
Rachael Diaz | Sustainable Housing Program Associate, California Housing Partnership
Honoring Black History Month & Celebrating Black Contribution 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

Jae Berg
## Session 1: SOMAH Program Update

### Application Breakdown

<table>
<thead>
<tr>
<th>Utility Territory</th>
<th># of Active Applications</th>
<th># of Waitlist Applications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pacific Gas &amp; Electric</td>
<td>202</td>
<td>0</td>
</tr>
<tr>
<td>Southern California Edison</td>
<td>123</td>
<td>0</td>
</tr>
<tr>
<td>San Diego Gas &amp; Electric</td>
<td>58</td>
<td>0</td>
</tr>
<tr>
<td>PacifiCorp</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Liberty Utilities</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>386</strong></td>
<td><strong>0</strong></td>
</tr>
</tbody>
</table>
**Where We Are Today**

- 30% 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
All territories are open to new applications with no waitlists

<table>
<thead>
<tr>
<th>Utility</th>
<th>Available Funding</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liberty Utilities</td>
<td>~$948,000</td>
<td>Funds available today</td>
</tr>
<tr>
<td>PacifiCorp</td>
<td>~$3,806,000</td>
<td>Funds available today</td>
</tr>
<tr>
<td>PG&amp;E</td>
<td>~$50,486,000</td>
<td>Funds available today</td>
</tr>
<tr>
<td>SCE</td>
<td>~$90,828,000</td>
<td>Funds available today</td>
</tr>
<tr>
<td>SDG&amp;E</td>
<td>~$10,286,000</td>
<td>Funds available today</td>
</tr>
</tbody>
</table>
Session 1: SOMAH Program Update

Regulatory Updates

- **Program Handbook:**
  - AL 114 - Filed in June 2020 requesting edits for substantive changes and minor revisions
    - Application Pipeline Management (Lottery)
    - Required Notification for Early Job Trainee Termination
    - System Changes Affecting Incentive Amounts
  - Substitute sheets filed on February 5 to integrate AL 114 Handbook (Fourth edition) with approved Progress Payment Handbook (Third edition)

- **Progress Payments Pathway** - *More in next session*
Session 1: SOMAH Program Update
Job Training: Resources & Expectations

Jobsite safety:

- Contractors should ensure a safe and harassment-free workplace for job trainees and tenants.
- New safety resources and trainings coming in 2021:
  - Online safety training for job trainees
  - Comprehensive solar jobsite safety guide
  - Safety reporting form
COVID-19 safety:

- Follow local, state, and federal health and safety guidance
- CalSOMAH.org/COVID19
- Contact workforce@calsomah.org if you are experiencing any COVID-19 related barriers to meeting the job training requirements.
Session 1: SOMAH Program Update

Job Training: Events

Job trainee events:
• Q1: Interview Workshop - Wednesday, March 10

Contractor events:
• Job Training Webinar for Contractors - May 2021
Session 1: SOMAH Program Update

CBO: New Partnership

Self-Help Enterprises (SHE)

- Central Valley CBO Partner
- Community development team serves more than 230 small communities
- Areas of support include:
  - safe drinking water
  - sanitary sewer infrastructure
  - affordable energy
Session 1: SOMAH Program Update

Tenant Education Services

Pilot Project:

• **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

Tenant Education Webinar:

• Q1: Monday, March 2 (12 - 1 p.m.)

Apply now at: [bit.ly/TE-Services-Pilot](http://bit.ly/TE-Services-Pilot)
Session 1: SOMAH Program Update

Q&A

- Name and organization
- **Verbal** comments and questions
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Session 2: Progress Payments Pathway
Jae Berg
Session 2: Progress Payment Pathway

Background

- COVID-19 pandemic has significantly impacted contractor business models and access to financing

 Proposal: Break the incentive payment into progress payments to help alleviate cash flow issues
Session 2: Progress Payment Pathway

Why Progress Payments?

1. Assist projects affected by cash crunch due to COVID-19

2. Break down financing barriers faced by smaller, more diverse contractors
Engaged with contractors, IOUs, CBOs, financiers, etc. to understand options

Balancing responsiveness to needs, against safeguarding program funds was a key consideration

Resulted in a two-payment progress payment pathway:

- 60% of the reserved incentive payment paid after the project has been verified to be mechanically complete
- Remaining incentive after the Incentive Claim Approval
CSE Advice Letter-118 submitted on September 18, 2020 and approved by Energy Division on December 21, 2020

Next steps for implementation:
→ Launch progress payments landing page on CalSOMAH.org
→ Hold a participant webinar on February 25, 2021
→ Finalize application documents and update PowerClerk
→ Update incentive contracts with each IOU

Launch progress payments (Date TBD)
Session 2: Progress Payment Pathway

Project Eligibility

- Eligible applicants can opt-in to the Progress Payment Pathway (PPP) after Proof of Project Milestone (PPM) approval is received

- PPP eligibility prerequisites
  - System is fully installed (“mechanically complete”)
  - Incentive Claim Package Deadline is no less than 4 months from PPP submission date
Session 2: Progress Payment Pathway

Program Requirements

● Application requirements
  o Progress Payment Request Form
  o Affidavit Ensuring Tenant Education
  o Optional/upon request: supporting documentations for virtual walkthrough
  o Electronic Payment Setup Form (as applicable)

● Projects will complete a live virtual walkthrough via a video call to verify system installation
Session 2: Progress Payment Pathway

Program Reporting

- Reporting on Progress Payments will rollout after launch
- Updates to Working Dataset on CaliforniaDGstats
  - Opt-in indication and progress payment amount
- The Semiannual Progress Report (SAPR) will include Progress Payments stats moving forward
Session 2: Progress Payment Pathway

Program Resources

- Visit Progress Payments Pathway landing page on program website at:
  - https://calsomah.org/progress-payment-pathway

- Attend the Progress Payments Pathway Webinar
  - February 25 at 10 a.m.
  - Register on CalSOMAH.org/events
Session 2: Q&A

- Name and organization
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Wrap Up & Next Steps

Kajsa Hendrickson
Looking Ahead & Next Steps

What’s Next?

- Forum will be recorded, but will not be made 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 (by 2/25/21)
- Q2 Forum scheduled for 6/2/21 with more information to come
Looking Ahead & Next Steps

Upcoming Events

- February 25, 2021: 10 a.m. PST Progress Payment Pathway
- March 2, 2021: 12 p.m. PST Tenant Education Webinar
- March 16, 2021: 10 a.m. PST Applicant and Contractor Eligibility Training
- May 12, 2021: 10 a.m. PST Applicant and Contractor Eligibility Training
Email: contact@CalSOMAH.org

Web form: CalSOMAH.org/contact-us

General hotline: 858-244-1177 ext. 5

Tenant hotline: 800-843-9728
Thank you!