

Q4 2021 SOMAH Public Forum Notes

Date: Wed, November 3, 2021

Time: 1-2:00 pm

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 a program update and overview of this year's milestones and priorities for the upcoming 2022 year, as well as spotlight some examples of SOMAH's support services.

The forum is ideally 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

Jaimie Joo, SOMAH Program Coordinator, gave an overview of the purpose of the forum, agenda, and introduced members of the SOMAH Program Administrator Team (SOMAH PA). She began by stating 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.

Session 1: Program Update, 2021 Accomplishments, & 2022 Priorities

Jaimie began with an overview of application statistics -- an increase of 100 applications since the Q1 Public Forum, 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	276
Southern California Edison	153

San Diego Gas & Electric	54
Liberty	1
PacifiCorps	2
Totals	486

To-date, \$172.7 million in funding has already been reserved, and \$248.08 million of funding is still remaining.

The PA is proud to report 32% active applications are located in DACs, which continues to be a targeted focus of the SOMAH program. Additionally, tenants are slated to receive 88% of the electricity generated from SOMAH installations. Both of these metrics have increased by 3% and 2% respectively, since the last public forum. The active applications are also estimated to serve more than 39,000 tenants with an average system size of 163 kW. The number of participating contractors also saw an increase since the last public forum with 15 contractors currently in the program, with eight additional subcontractors reported at this time. The pipeline also supports 735 training opportunities with more than 50,000 projected training hours. These job training opportunities equate to over \$1 million in projected wages leveraging over 60 job training organization relationships.

At this time there are 135 SOMAH projects currently eligible for progress payments. So far, six progress payments have been issued (\$1.95 million), with two additional projects being processed. Completed projects and incentive payments have had increased activity as well with 10 (up from 6 from last quarter) final incentive payments issued (\$3.42 million), and five additional projects close behind at Incentive Claim Milestone, inspection, and pending payment. The PA anticipates additional project completion activity through the end of the year with a significant increase of activity in 2022. Five projects have upcoming incentive claim due dates in Q4 2021 and 150 projects with incentive claim due dates in Q1 & Q2 2022.

Jaimie highlighted the ten fully completed SOMAH projects to-date, and where they're located across the state. Half of these completed projects are located in disadvantaged communities (or DACs), and vary in size from 30 to 224 households, and 50 to 370 kW of solar. Jaimie also shared some key highlights from 2021 which included:

- The first applicants leveraged the program's Progress Payments pathway
- The second Advisory Council Cohort began (with returning & new members)
- The SOMAH PA participated in it's first ribbon-cutting ceremony for a SOMAH project in Orosi, CA

- The team conducted its first tenant services workshops in Stockton, CA (more details in second session)
- The SOMAH PA held two listening sessions for community-based organizations interested in learning more about SOMAH and opportunities to partner with the program.
- The Marketing, Education, & Outreach team held two contractor focus group sessions to evaluate outreach and marketing tactics, and identify challenges and barriers to participation (DAC property owner focus group coming later this year)
- SOMAH's third-party evaluation concluded this year, with a robust report of findings and recommendations for the SOMAH PA to consider in future program updates and development.

Jaimie then provided a reminder on the program's Handbook update which will be filed in Q1 2021, and include the following updates:

- Establishing a program target or benchmark for the number of properties in DACs to make up 40% of all total SOMAH properties by 2026
- Instituting a waiver for application deposits for priority applications such as DACs, as a way to incentivize participation
- A Code of Conduct which will be appended to the Handbook and sets standards of conduct and safety for all program participants and provides grounds for recourse if breached
- Expanding compliance language that clarifies that the PA may issue infractions, failures, etc., for noncompliance with job training and tenant education requirements.
- A proposal to update eligibility language, given the new version of CalEnviroScreen, 4.0

Jaimie also gave an update that the July California Contractors State Licensing Board voted to restrict the installation of energy storage systems to C-10 contractors, beginning November 1 (i.e. C-46 would no longer be permitted to install storage systems). However, the Attorney General of California recently filed a written stipulation agreeing to voluntarily stay of enforcement of this decision, so C-46 contractors may continue to install solar plus storage systems beyond November 1 with their existing, trained workforce.

Jaimie reminded participants of SOMAH's resources to support interested or participating applicants: SOMAH's Eligible Properties Map which helps participants identify multifamily affordable properties eligible for SOMAH throughout the state; and SOMAH's suite of no-cost TA services which cover everything from solar feasibility, financial analysis, referrals to other energy programs to services to help meet job training and tenant education requirements.

In an effort to understand the continued impacts of the COVID-19 pandemic on SOMAH's communities, the PA had participants complete two polls about how they continue to be affected by the pandemic. The results are below:

Has the COVID-19 pandemic impacted your ability to participate in the SOMAH program in 2021?

- 22% Yes, substantially
- 44% Yes somewhat
- 11% Yes minimally
- 22% No

What aspects of your SOMAH projects (either active or prospective) have been impacted by COVID and its associated restrictions?

- 33% Staff capacity restraints
- 16% Reduced cash flow
- 16% Permitting delays
- 16% Generating leads
- 16% Completing milestones

The second half of this session focused on sharing the PA's 2022 goals and priorities. The three primary goals for 2022 are:

1. **To increase the program pipeline:** To ensure the PA makes progress toward the program's overarching goal to install 300 MW of solar on multifamily affordable housing by 2030, the PA plans to increase participation and further build the program's pipeline through a combination of efforts including targeted marketing, participant support services (including expanding TA) and streamlining program processes.
2. **To measure and increase participation by underserved communities,** including EJ communities, DACs, farmworker communities, and tribal communities among others - to ensure SOMAH reaches and serves communities that may benefit most.
3. **To increase participant diversity.** To achieve program goals, the PA will need to enlist additional types of participants and understands that the spirit of SOMAH requires the PA to engage with and support the success of small and diverse entities and business enterprises.

Finally, Jaimie shared the goals of SOMAH's 2022 Marketing, Education and Outreach Plan, which touch on participation and access to the program's benefits for all of SOMAH's primary audiences, and noted that a draft version of the plan will be available for public comment early next year.

Session 1 Q&A:

Q: An attendee mentioned a crowdsource funding platform called Energea and asked if they could connect them to the SOMAH PA in response to providing more financing support and options for SOMAH projects. They also provided several links and contact information for more info: www.energea.com and www.primestor.com

A: The PA was in strong support, noting they're currently looking to secure gap or bridge financing options to provide participants. The program is designed to offset 100% of the cost on the tenant system and a portion on the property size, but there's a gap in time between starting the project and receiving the incentive where properties need gap or bridge financing, so having a variety of different financing options/providers can help.

Q: A participant asked if the SOMHA PA could help review their properties and identify if any are eligible for SOMAH?

A: The PA responded absolutely, and that this is part of the services they offer. Please contact: TechAssist@Calsomah.org

Q: A participant had a question about SOMAH's third-party evaluation findings and recommendations, asking whether there would be a workshop or public process to talk through the recommendations and what might be appropriate priorities for PA action, and how to partner on those actions, if needed.

A: The PA noted that stakeholder engagement is important, to ensure that all of SOMAH's participants are able to access and engage in the program successfully. The PA is going through a separate formal comment process with the CPUC, to provide responses on which recommendations the PA will be taking action on, and will present that plan in the Q1 Public Forum. This public forum will be the opportunity to provide input on those third party recommendations and potential actions the PA is planning.

Q: A participant asked if the PA could elaborate on its increased work with community-based organizations.

A: The SOMAH PA is currently contracted with five CBOs across California, and a sixth CBO as a workforce development partner. These CBOs do incredible work for the PA, butl have geographic gaps in their organizing areas that the PA would like to have covered. This summer, the PA held two CBO listening sessions to get as many CBOs as possible to talk to the PA about what SOMAH could look like in their communities and see what partnership with SOMAH could look like. The PA had three interested CBOs come forward and ask to explore a deeper partnership with them. The PA is always open to new partnerships and what that looks like with any organization. Please email the PA at CBOs@calsomah.org for more information

Session 2: Spotlight on SOMAH's Support Services

Staci Hoell, SOMAH's Workforce Development Manager, kicked off the session highlighting the PA's interest in supporting on-site events to celebrate completed SOMAH projects, such as ribbon-cutting ceremonies. In September, the PA participated in a ribbon-cutting event organized by Self-Help Enterprises and Sunrun at the Sand Creek Community Apartments in Orosi, California -- celebrating a 128 kW solar system which will deliver direct energy bill credits to 60 families of primarily farmworkers. The event was also attended by Eric Coyne, the field representative for Senator Melissa Hurtado's office, who gave certificates of recognition from the Senators office to the SOMAH team, Sunrun and Self-Help.

Staci then moved on to highlight SOMAH's job training support services for contractors in meeting job training requirements, and for trainees in getting connected to SOMAH job opportunities. These services include: recruitment and placement support, support navigating the Job Training Portal, connecting contractors to local job training organizations, and educational and professional development workshops for both trainees and contractors. Staci also reminded contractors to contact the SOMAH PA well in advance for support, and that training opportunities must be entered within the Job Training Portal **at least 60 days before construction begins**. Contact workforce@calsomah.org for more information.

Staci shared some of the job training successes to-date, which include: connecting nearly 80 trainees to contractors, three trainees being hired in permanent positions, one tenant has participated as a job trainee, and over 80% of job trainees hired so far are priority or targeted hires (women, people of color, formerly unemployed individuals, reentering citizens, and those experiencing a number of other barriers to employment).

Sarah Salem, SOMAH's Senior Tenant Services & Community-Based Organization Manager highlighted SOMAH's tenant education services, first reviewing SOMAH's tenant education requirements: Host customers must provide SOMAH-approved education materials to all tenants **60 days or fewer** prior to the start of construction, and must provide the materials by 1) direct delivery to residents, or mailers, and at least one of the following: an email notification, or an in-person tenant meeting/workshop. To help Host customers meet the second requirement, the PA offers free, personalized Tenant Education Services, which can include any of the following: Tenant Education 101 meetings, Tenant Education "train the trainer" services, and Tenant Education Service workshops. To apply for tenant services, go to bit.ly/SOMAH-TE-Services or email tenants@calsomah.org 60 days or more before install.

Sarah then highlighted a series of tenant education workshops the PA conducted for Coventry Apartments in Stockton, California in October. In coordination with the

contractor & on-site manager, the PA organized four outdoor workshops over three days with programming for youth, adults with special needs, and other residents. Sarah then welcomed Miss Anissa Bailey, the onsite property manager to provide an overview of her experience with the Tenant Education workshops.

Sarah: How did you decide to take advantage of SOMAH's Tenant Education Services?

Ms. Bailey: I thought it would be great to have folks come out and speak to tenants. I felt like I could do it myself, but realized it was a lot, and thought it would be a great idea to have the team come out and present the information to her tenants. There is a mixture of tenants at the apartment, including folks with special needs, so it felt important to group them into their own session to feel comfortable with the PA and their team.

Sarah: Overall what was your experience like?

Ms. Bailey: It was beneficial overall, the team brought water and healthy snacks and held all the workshops outside for safety. They were pleasant, not rushed, and the residents were really excited to see their electricity bills go a little bit lower

Sarah: Would you recommend this service to others? Why?

Ms. Bailey: Yes! I always have a sense of community -- I'm relatively close with the tenants that live here and I live on-site so I know many of them and wanted them to feel like we could come together and get those questions answered right away, and know what to expect, like what their bills are going to look like. And when session was over the team stayed behind for 30-45 minutes just to engage with the tenants. I'm all about community -- you get to bring your complex together and have tenants get to know one another and get their questions answered and know what's going on.

Sarah: Was this valuable to your tenants?

Miss Bailey: Absolutely. I could have just passed flyers out but they would have had more questions than I had answers. I recommend you take advantage of this -- the service is free, and the team is amazing -- they followed up after the workshop as well and told tenants they could reach out to them as well.

Session 2 Q&A:

Q: A participant asked where to find the Directory of Job Training Organizations that Staci mentioned

A: At <https://www.ca-somah.org/jobportal/s/external-organization-directory>. If participants know of another JTO that they recruit from, know of them generally and

they're not in the directory, please reach out to workforce@calsomah.org so the PA can verify the details of the program and get them on that directory.

Q: A participant asked if it would be possible to have an ESA provider at the tenant education services workshops, assuming that someone would be able to do that.

A: The PA noted that this was a great suggestion and something they can mention to SOMAH's IOU partners. Information about ESA is included in program materials, though it would be great to make sure the team has forms on-hand or if the IOUs could send a rep to get more people enrolled.

Looking Ahead & Next Steps

Jaimie Joo shared the following upcoming SOMAH events, which can be registered for at calsomah.org/events:

- **November 17:** Fair Chance Hiring Workshop for Contractors & Solar Employers
- **December 2:** Financial Technical Assistance Basics: Know Your Solar Options
- **December 9:** SOMAH Contractor Eligibility Training
- **December 16:** "Know Your Employment Rights" Workshop for Job Trainees
- **January 27:** SOMAH Contractor Eligibility Training

Jaimie also shared the announcement that applications for the second term of SOMAH's Job Training Organization Task Force are now open, encouraging attendees to share this opportunity with their network of colleagues that are instructing or preparing individuals for solar careers. Applications are due on Friday, December 10. Apply at CalSOMAH.org/job-training-organization-task-force

Jaimie 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 or testimonials about their SOMAH experience. Interested parties should email contact@CalSOMAH.org. Jaimie also shared a call to action to join SOMAH's social media channels and newsletter to stay in the loop on important updates and events:

- Newsletter: calsomah.org/email-sign
- Follow/like at @CalSOMAH on
 - [Twitter](#)
 - [Facebook](#)
 - [Instagram](#)
 - [LinkedIn](#)

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

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