SOLAR ON MULTIFAMILY AFFORDABLE HOUSING

PUBLIC FORUM: November 3, 2021
<table>
<thead>
<tr>
<th>Time</th>
<th>Session Overview</th>
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<tr>
<td>1:00-1:05</td>
<td>Welcome &amp; Introductions</td>
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</table>
| 1:05-1:30 | **Session 1**: Program Update: 2021 Accomplishments & 2022 Priorities  
- Key program updates and 2021 accomplishments  
- Overview of 2022 priorities  
- Q&A/Discussion |
| 1:30-1:55 | **Session 2**: Spotlight on SOMAH's Support Services  
- Tenant and job training services spotlights  
- Q&A/Discussion |
| 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.

For more information please visit stopaapihate.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 (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 Rebate Processing Specialist
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
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
Session 1: SOMAH Program Update - 2021 Accomplishments & 2022 Priorities

Jaimie Joo
## Session 1: SOMAH Program Update

### Application Breakdown

<table>
<thead>
<tr>
<th>Utility Territory</th>
<th># of Active Applications</th>
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<tbody>
<tr>
<td>Pacific Gas &amp; Electric</td>
<td>276</td>
</tr>
<tr>
<td>Southern California Edison</td>
<td>153</td>
</tr>
<tr>
<td>San Diego Gas &amp; Electric</td>
<td>54</td>
</tr>
<tr>
<td>PacifiCorp</td>
<td>1</td>
</tr>
<tr>
<td>Liberty Utilities</td>
<td>2</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>486</strong></td>
</tr>
</tbody>
</table>
All territories are open to new applications with no waitlists

<table>
<thead>
<tr>
<th>Utility</th>
<th>Available Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liberty Utilities</td>
<td>~$952,000</td>
</tr>
<tr>
<td>PacifiCorp</td>
<td>~$3,830,000</td>
</tr>
<tr>
<td>PG&amp;E</td>
<td>~$74,730,981</td>
</tr>
<tr>
<td>SCE</td>
<td>~$139,860,621</td>
</tr>
<tr>
<td>SDG&amp;E</td>
<td>~$28,705,294</td>
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- **$172.75 million** in funding that’s already been reserved
- **$248.08 million** funding remaining
Session 1: SOMAH Program Update
Where We Are Today

● 32% 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 **39,583** tenant units
- Average system size: **163 kW**
- 15 participating contractors
  - 8 subcontractors reported
- Pipeline supports **735** job training opportunities
  - Nearly **50,000** projected training hours
  - Approx. **$1M+** in projected wages
  - Leveraging over **60** job training organization relationships
Session 1: SOMAH Program Update

Application Statistics

- **Progress Payments**
  - 135 projects currently eligible for Progress Payments
  - 6 progress payments issued ($1,953,544)
  - 2 under review/pending payment

- **Incentive Claims**
  - 10 final incentive payments issued ($3,427,670)
  - 5 close behind at Incentive Claim Milestone, inspection, and pending payment

- **Upcoming activity**
  - 5 projects have upcoming incentive claim due dates in Q4 2021
  - 150 projects with incentive claim due dates in Q1 & Q2 2022
Session 1: SOMAH Program Update
Completed Projects

10 completed projects serving over 970 tenant units!

- Oxnard, CA
  - 150 kW
  - 144 units
  - in a DAC

- San Marcos, CA
  - 170 kW
  - 72 units

- Fontana, CA
  - 272 kW
  - 93 units
  - in a DAC

- San Marcos, CA
  - 110 kW
  - 48 units

- Victorville, CA
  - 246 kW
  - 100 units

- Jurupa Valley, CA
  - 89 kW
  - 39 units
  - in a DAC

- Templeton, CA
  - 50 kW
  - 30 units

- Rancho Cucamonga, CA
  - 370 kW
  - 166 units

- Orosi, CA
  - 128 kW
  - 60 units
  - in a DAC

- Rancho Cucamonga, CA
  - 315 kW
  - 224 units
  - in a DAC
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
Other Program Updates & Announcements

● SOMAH Program Handbook Update
  ○ 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
  ○ Expected filing in Q1 2021

● Contractors State Licensing Board Update on BESS Installation
  ○ CA’s Attorney General issued stay of enforcement on the July 27 decision to restrict battery energy storage system installation to C-10 contractors.
  ○ C-46 solar contractors may continue to install solar + storage systems.
Session 1: SOMAH Program Update

SOMAH Resources - Eligible Properties Map

- Tool to identify potential SOMAH properties
- Properties based on SOMAH requirements & current applications
- Tabs
  - Disadvantaged communities (DAC)*
  - Utility territory
  - Legislative districts
  - Climate zones
- Advanced filters

Visit: Calsomah.org/eligible-somah-properties-map
Session 1: SOMAH Program Update

SOMAH Resources - Suite of TA Services

TA 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
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?
Program Priorities for 2022

Why does environmental justice matter?

People of color and low income communities are living, working, and playing in America’s most polluted environments.

Figure 4: Fraction of Each Racial/Ethnic Group Living in the Top 20% Census Tracts.
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
1. To increase the program pipeline
   a. Reevaluate & expand program services (*App support and technical assistance*)
   b. Streamline the customer journey (*app resources & communication*)
   c. Enlist additional trusted messengers to co-market SOMAH (*gov. entities, IOUs, CCAs, CBOs, “ambassadors”*)
   d. Make targeted improvements to SOMAH’s financial value proposition (*adjusting incentives, app fee waivers, connecting to financial services*)
   e. Continue participant research (*surveys, focus groups*)
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 1: SOMAH Program Update

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
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Session 2: Spotlight on SOMAH's Support Services

Staci Hoell & Sarah Salem
Session 2: Spotlight on SOMAH’s Support Services

Session Overview

1. Celebrating completed projects
2. Workforce services
3. Tenant education services

Sarah Salem
Senior Tenant Services & Community Based Organization Manager

Staci Hoell
Workforce Development Manager
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
Sand Creek Apartments
Orosi, CA

- 60 units
- 128kW
Session 2: Spotlight on SOMAH’s Support Services

SOMAH’s Job Training Support

We support contractors in meeting SOMAH’s job training requirements, and trainees in getting connected to SOMAH 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
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

1. 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:
Free tenant education support services to help projects reach their tenant education requirements:

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

Apply now at:
bit.ly/SOMAH-TE-Services

or email us at:
tenants@calsomah.org
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 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
Welcome Ms. Anissa Bailey!
Session 2: Making the most of SOMAH’s TA Services

Discussion/Q&A

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Wrap Up & Next Steps

Jaimie Joo
Session 1: SOMAH Program Update

Upcoming 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

Register at [calsomah.org/events](http://calsomah.org/events)
Join the Job Training Organization Task Force!

As a Task Force member, you will advise the SOMAH Program Administrator on:

- Local hiring initiatives
- Strategies to engage job trainees
- Maximizing trainee benefits

Applications are due by **Friday, December 10**.

Apply at [CalSOMAH.org/job-training-organization-task-force](http://CalSOMAH.org/job-training-organization-task-force)
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
Wrap Up & Next Steps

Follow us!

For the latest news and updates about the program:

- Subscribe to our newsletter: 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

Web form: CalSOMAH.org/contact-us

General hotline: 858-244-1177 ext. 5

Tenant hotline: 800-843-9728
Thank you!