

# Upfront Technical Assistance Explained

A guidebook to help property owners navigate the process of going solar through no-cost and no-obligation services.



Solar on Multifamily Affordable Housing





*The nation's largest investment in clean energy for affordable housing, SOMAH was created by the California Legislature to help reduce energy bills for low-income residents.*

# Welcome to SOMAH

California's Solar on Multifamily Affordable Housing (SOMAH) Program provides incentives to substantially reduce the cost of a solar installation and includes a suite of no-cost technical assistance services to make the process of going solar easier for property owners.

To guide property owners (POs), SOMAH offers complimentary whole-building technical assistance (TA) personalized to meet their specific needs and answer all questions POs have when considering going solar.

# Table of Contents

I. What is Upfront Technical Assistance?.....	4
II. Why Choose Upfront TA?.....	5
III. What Does Upfront TA Include?.....	6
IV. Common Questions.....	7
V. Submitting an Upfront TA Request.....	8
VI. Upfront TA Success Story.....	9
VII. Still Have Questions?.....	11
VIII. Resources.....	11

# I. What is Upfront Technical Assistance?

Upfront TA is designed for POs who are interested in solar but have questions about where to begin. If a PO is already working with a solar contractor and has questions, they may still request support.

**Installing solar on existing multifamily properties requires navigating and overcoming barriers, including complicated ownership and financing structures as well as understanding the solar costs and benefits.**

Upfront TA provides POs with a comprehensive assessment of their property's on-site solar potential and current energy usage patterns, the best system size to meet their property's needs, and financial analysis to determine project feasibility.

**All services and resources are provided at no cost.**

If a pathway forward is feasible, POs will receive support soliciting project bids from different solar contractors, enabling them to select the contractor that is best for them.



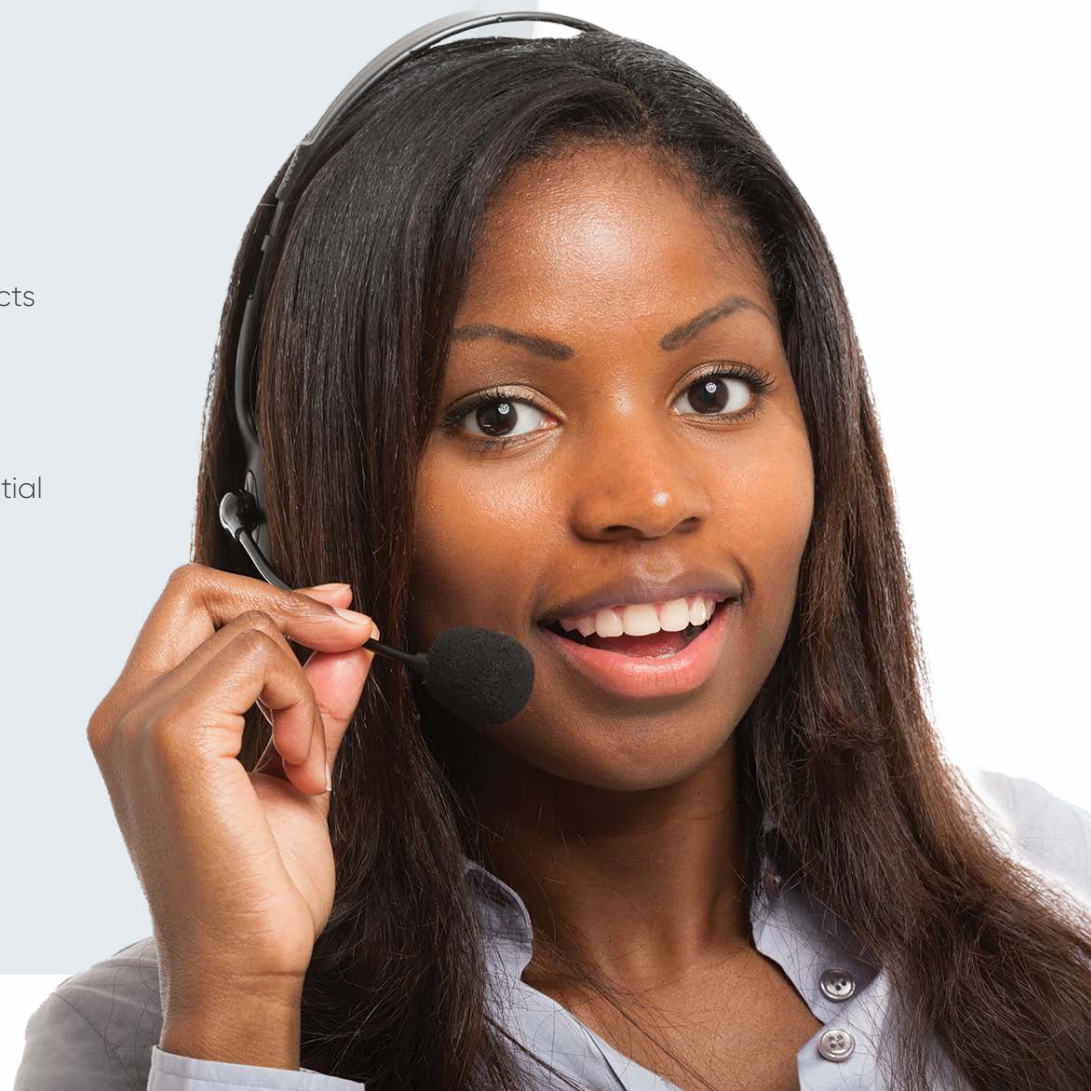
*Upfront Technical Assistance is three months of support provided to property owners to help determine the costs and benefits of moving forward with a SOMAH project.*

## II. Why Choose Upfront TA?

### SOMAH's Upfront TA services make it easy.

The services cover a wide range of project-related elements, including:

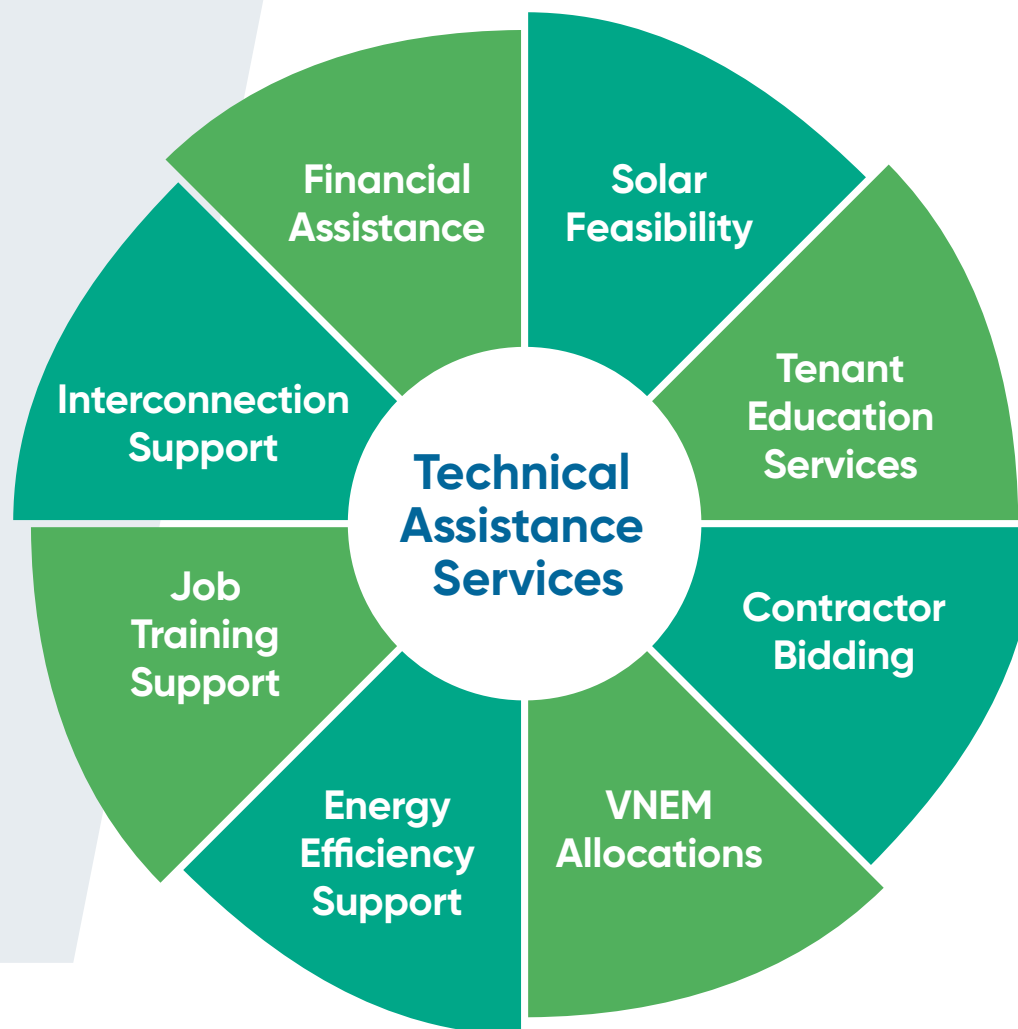
- Loans, leases, and other financing information
- Understanding your current energy usage and utility bill impacts after solar installation.
- Sizing of solar PV systems based on historical consumption, planned energy upgrades, and on-site solar PV potential.
- A solar feasibility report with a rooftop assessment and potential savings analysis tailored to your property's unique needs.
- Guidance to objectively assess bids from solar contractors.
- Information and referrals to other energy efficiency programs, storage programs, and electric vehicle programs.
- Your incentive funds will be held for up to three months
- One of our expert Energy Project Managers will guide you through the entire TA process.



### III. What Does Upfront TA Include?

Upfront TA provides POs with educational, technical, and financial resources to facilitate their solar installation, including solar feasibility, financial analysis, contractor bidding, completing virtual net energy metering (VNEM) allocations as well as referrals to other energy programs.

Unique to SOMAH are opportunities for POs to educate their tenants about the solar project process and the direct benefits they will receive as well as learn about paid job training opportunities.



## IV. Common Questions

Here are some common questions asked during Upfront TA, we will supply you the answers.

### Solar Feasibility Support

- Is solar right for my property?
- How much solar can fit on the roofs?
- How much can SOMAH offer in incentives?
- How much can I save on my energy bills?

### Financial Assistance

- How much will a solar project cost?
- How do I finance out-of-pocket costs?
- What system ownership options are possible?
- What is a solar power purchase agreement?

### Energy Efficiency Support

- Are there programs available for other energy efficiency upgrades?
- How do I connect with other energy efficiency programs?
- Should I install energy efficiency upgrades before going solar?

### Contractor Bidding Support

- How do I find a solar contractor?
- How do I obtain project bids from SOMAH-eligible contractors?
- How do I compare one project bid to another?

## V. Submitting an Upfront TA Request

Submitting an Upfront TA request is easy and only requires a few steps to get started.

All Upfront TA requests are submitted through PowerClerk, which is SOMAH's online application processing platform.

As a first step, choose the appropriate electric utility of the property and create a PowerClerk account.

After your PowerClerk account has been set up, you will need to complete the Upfront Technical Assistance form and submit four key documents with the form.

It's as easy as 1, 2, 3!

For more information, please visit [CalSOMAH.org/technical-assistance](https://CalSOMAH.org/technical-assistance) or watch our helpful [Upfront TA video](#) tutorial.

1

Select Electric  
Utility of  
Property

2

Create a  
PowerClerk  
Account

3

Compile  
and Submit  
Documents



## VI. Upfront TA Success Story

Entering Upfront TA, the property owner voiced several questions. He was interested in the steps needed to start a solar project and how to tell if the roofs on the buildings were even suitable for solar due to the unique shapes and existing rooftop obstructions. The property owner also asked general financial questions about solar project costs, how to pay for a PV system, and how would his operating expenses be reduced after going solar.

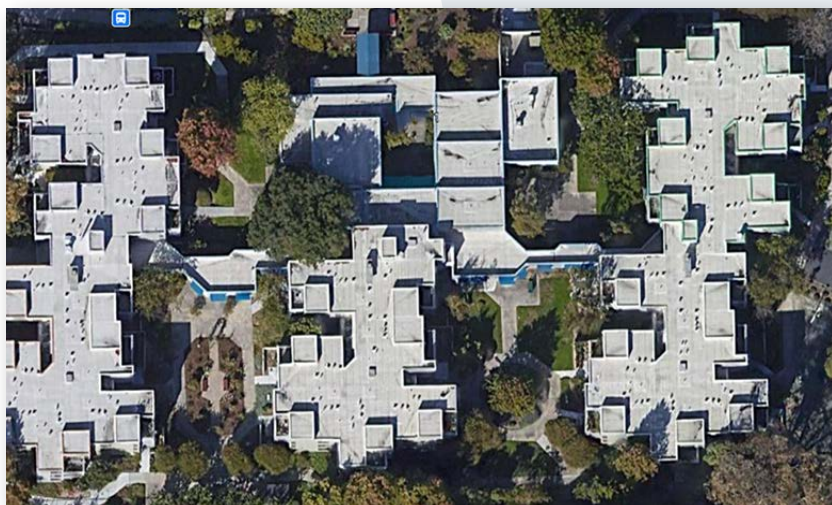
To help fill in these knowledge gaps, TA services were provided to help make the property owner's solar journey as simple as possible. We helped him evaluate the solar potential and feasibility at the property through multiple system design iterations and provided financial assessments and a cost/savings analysis so that he was able to select a potential design that made financial sense to him.

Because the property owner was interested in reducing operating expenses at the property, we referred him to local energy efficiency programs. Through coordination with those programs, the property owner learned how whole-building and direct install upgrades could impact the property's operating costs.



*Property: Apartment complex with 101 one-bedroom units built in 1979 in PG&E service territory*

## VI. Upfront TA Success Story (cont.)



The solar feasibility and financial support that was provided was intended to help the property owner understand what might be typical for his property. As a next step, we encouraged the property owner to solicit project bids from SOMAH eligible solar contractors to receive system details based on physical site conditions.

Soliciting project bids can come with its own set of challenges. The property owner wasn't confident in locating reputable solar contractors with multifamily experience, he wasn't sure what questions to ask contractors bidding on the project, or what the next steps were after selecting a solar contractor.

To make the contractor bidding process less daunting, we helped the property owner navigate one of SOMAH's helpful resources, the Online Bidding Tool. The bidding tool connected the property owner with SOMAH eligible solar contractors and shared project details with the contractors so that they could prepare informed project bids.

After the contractors submitted their project bids, we encouraged him to ask follow-up questions so that he was able to review and compare the project bids with a better understanding. Once armed with the knowledge and confidence he needed, the property owner selected a contractor to move forward with in the SOMAH process.

## If you aren't sure if enrolling in SOMAH is right for you, let us help!

We can provide you with solar details specific to your property, like a preliminary solar design and financial details, to help you decide if you should take the next step toward submitting an Upfront TA request.

If you have questions about a solar project, submitting an Upfront TA request, or about any of the services presented in this e-book, contact us by email at [TechAssist@CalSOMAH.org](mailto:TechAssist@CalSOMAH.org).

## Additional Resources for POs

SOMAH has helpful resources available online to help you with your solar project, including:

- Information on [gap financing](#) for additional funding
- [Understanding Solar](#)
- Watch more helpful videos on our [SOMAH Property Owner YouTube](#) channel

## VII. Still Have Questions?

## VIII. Resources



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Apply for Upfront TA at  
**[CalSOMAH.org/technical-assistance](https://CalSOMAH.org/technical-assistance)**

858-244-1177 ext. 5  
**[TechAssist@CalSOMAH.org](mailto:TechAssist@CalSOMAH.org)**



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