

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 installing solar and energy storage systems when paired with solar.

To guide property owners (POs), SOMAH offers a suite of no-cost Technical Assistance (TA) and Support Services to make the process of installing these clean energy upgrades easier. This whole-building assistance is personalized to meet POs specific needs and answer all questions they may have from considering solar and storage to system operation.

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I. What is Upfront Technical Assistance (TA)?

Upfront TA is designed for POs who are interested in a SOMAH installation 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 photovoltaic (PV) panels and energy storage at 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 gives POs a complete assessment of their property, covering solar and energy storage potential, energy usage patterns, the right system size, and a financial analysis to confirm project feasibility.

All services and resources are provided at no cost.

If a pathway forward is clear, 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 six 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 and energy storage systems based on historical consumption, planned energy upgrades, and on-site solar PV potential.
- A project 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 six months.

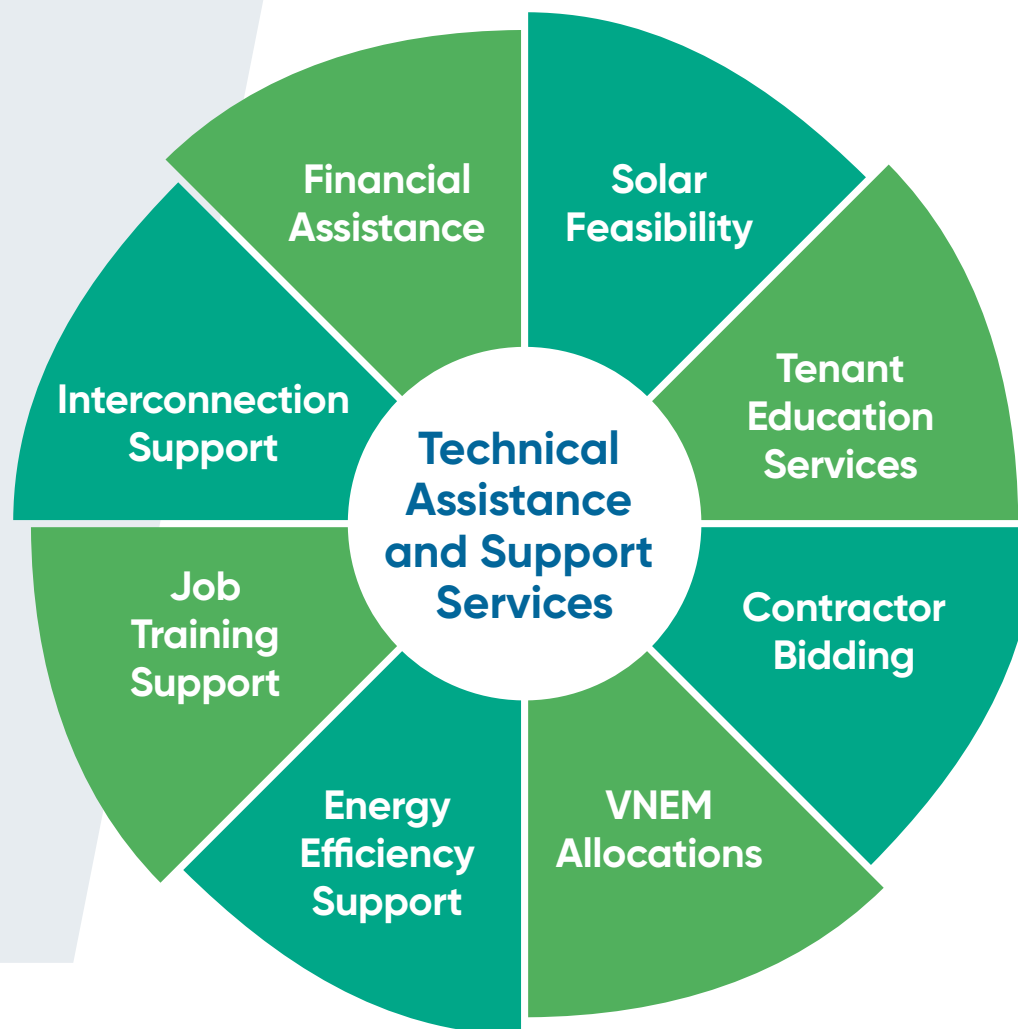
One of our expert Energy Project Managers will guide you through the entire TA process.



III. What Does Upfront TA Include?

Upfront TA provides POs with educational, technical, and financial resources to facilitate their project installation, including solar and storage 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 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?

Energy Storage Integration

- What does an energy storage system do?
- How does storage work with solar?
- Does adding storage change how tenants receive virtual net energy metering (VNEM) credits?

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 three key documents with the form.

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

For more information, please visit our [Technical Assistance and Support Services](#) page 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

The solar installation at St. Mary's Gardens, a 100-unit apartment complex for seniors in Oakland, Calif., exemplifies SOMAH's resident-centered approach to Upfront TA services. From the beginning, the property owner, St. Mary's Elderly Housing Corporation, recognized SOMAH's potential to provide residents not only energy cost savings but a more comfortable lifestyle as well.

Entering Upfront TA, the property owner was interested in the steps needed to consider a solar project for the property and how to understand if the roofs on St. Mary's buildings were suitable for solar due to the unique building shapes and the existing rooftop obstructions. They also had general financial questions about solar project costs, how to pay for a solar PV system, and if the system would reduce building operating expenses as well as resident energy bills.

The property owner acknowledged the challenges faced when pursuing a solar PV system, including soliciting bids from contractors and reviewing the bid details. However, they emphasized that overcoming these hurdles was essential to maximize the economic relief provided to the residents. For guidance, the property owner turned to the SOMAH Technical Assistance (TA) and Support Services team for support soliciting bids from solar contractors and ultimately selecting a solar contractor.



***St. Mary's Garden's:
Apartment complex with 101
one-bedroom units built in
1979 in PG&E service territory***

VI. Upfront TA Success Story (cont.)



Working with their solar contractor and the TA and Support Services team, the solar design for St. Mary's Gardens went through multiple design and layout iterations as well as financial analyses. The TA and Support Services team helped the property owners with a cost savings analysis so that they were able to select a system design that made financial sense.

The project at St. Mary's Gardens extended beyond solar installation, catalyzing larger energy efficiency upgrades. After a thorough evaluation of the property's existing conditions and systems by the TA and Support Services team, the property was referred to and enrolled in three energy efficiency programs. With funding from these initiatives, outdated equipment was replaced with more efficient models and natural gas equipment was removed. These upgrades will improve indoor air quality, increase building safety and enhance resident comfort in every season.

SOMAH Program Manager Staci Rivas expressed pride in supporting projects like St. Mary's Gardens. "St. Mary's Gardens is an example of a success story where a solar installation incentivized by SOMAH can be complemented by a more comprehensive building retrofit that directly impacts residents through utility bill savings," she said.

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

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

If interested in planning for solar, with or without energy storage, or if you have questions about a potential project or any if the information presented in this e-book, simply complete a Technical Assistance and Support Services request form at CalSOMAH.org/TA-Request.

Additional Resources for POs

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

- SOMAH's [Incentives & Finance](#) page
- [Understanding Solar Energy Systems](#)
- Watch more helpful videos on our [SOMAH Property Owner YouTube](#) channel

VII. Still Have Questions?

VIII. Resources



Solar on Multifamily Affordable Housing

Learn more about all our Technical Assistance and Support Services at
CalSOMAH.org/technical-assistance-and-support-services

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