

Meeting Notes

Solar on Multifamily Affordable Housing (SOMAH) Advisory Council & JTO Task Force Meeting Notes

Q4 2020
December 4th, 2020
Remote Meeting

Attendees

SOMAH Program Administrators:

Chris Walker | SOMAH Program Director, GRID Alternatives
Jae Berg | SOMAH Program Manager, GRID Alternatives
Luis Amar | SOMAH Technical Coordinator, GRID Alternatives
Marisa Villarreal | SOMAH Program Manager, GRID Alternatives
Sarah Salem | SOMAH Tenant Services & CBO Manager, GRID Alternatives
Staci Hoell | SOMAH Workforce Development Manager, GRID Alternatives
Zara Jamshed | SOMAH Technical Coordinator, GRID Alternatives
Erika Symmonds | VP of Workforce Development, GRID Alternatives
Lauren Friedman | Training and Service Program Manager, GRID Alternatives
Pooja Ravindran | Workforce Development Specialist, GRID Alternatives
Daisy Meyer | Training and Service Program Manager, GRID Alternatives
Michael Dela Pena | Construction Training Manager, GRID Alternatives
Sana Sheikholeslami | CBO and Tenant Services Coordinator, GRID Alternatives
Daryl Lambert | Workforce Engagement Lead, Rising Sun Center for Opportunity
Anthony Samperio | Trainee Resource Lead, Rising Sun Center for Opportunity
Rachel Burns | JTO Engagement Lead, Rising Sun Center for Opportunity
Julia Hatton | Chief Executive Officer, Rising Sun Center for Opportunity
Travers McNeice | Chief Program Officer, Rising Sun Center for Opportunity

SOMAH Advisory Council Members

Agustin Cabrera | Senior Community Organizer, Los Angeles Alliance for a New Economy
Andrea Barnier | Senior Asset Management Specialist, Self-Help Enterprises
Andres Ramirez | Policy Director, Pacoima Beautiful
Stephen Lassiter | Public Policy & Market Development, Sunrun
Cynthia Strathman | Executive Director, Strategic Actions for a Just Economy
JB Tengco | West Coast Director, BlueGreen Alliance

Kenneth Wells | CEO & Founder, O&M Solar Services (Chair)

Esther Portillo | Acting Director, Center for Community Action and Environmental Justice

SOMAH JTO Task Force Members

Cesar Montemayor | Proteus Inc.

Eddie Ahn | Brightline Defense

Edward Ruiz | East Los Angeles Skills Center

Jon Caffery | Saddleback College/College of The Desert

Manuel Vasquez | Building Justice SD - hoMEwork

Senait Forthal | OC Go Solar

Wes Olson | Center for Employment Training - Oxnard

Stuart Cooley | Santa Monica College

Mitchell Smith | Young Community Developers

Meeting Agenda

1. Welcome, Meeting Overview, Icebreaker
2. Advisory Council and JTO Task Force Overview
3. 3rd Party Evaluation Recommendation Discussion - Pt. 1
4. 3rd Party Evaluation Recommendation Discussion - Pt. 2
5. Wrap Up & Next Steps

Welcome, Introductions

Daryl Lambert, Workforce Engagement Lead, Rising Sun Center for Opportunity

Daryl Lambert opened the meeting and led introductions for the SOMAH Program Administrators (PA), the Advisory Council (AC) and the JTO Task Force members. Daryl also reviewed the meeting goals and the agenda and led an ice breaker activity for AC and JTO Task Force members in breakout rooms.

- Discussion questions:

- What draws you to an advisory role with the SOMAH program?
- How does this relate to your work?
- If you were unable to leave your home for several months, what item(s) would you be sure to have?

Group 1 commonalities:

- 1) Job training and workforce development - good quality jobs for

underserved populations

- 2) Focus on environmental justice & communities most impacted - need to switch to clean energy so we can have clean air
- 3) We are realists - we need food, TP, entertainment for our kids and ourselves

Group 2 commonalities:

- 1) Creating opportunities in solar workforce (esp for those from social justice, EJ communities)
- 2) Transforming communities through clean energy power - access and jobs
- 3) Building learning and educational opportunities

Group 3 commonalities:

- 1) Solar access equity for underserved communities, MF tenants in the vein of EJ, social justice
- 2) Careers! Expanding training to underserved communities
- 3) Family (+pets), books, video games, phone, baking

Advisory Council and JTO Task Force Overview

Marisa Villarreal, Program Manager

Daryl Lambert, Workforce Engagement Lead

Staci Hoell, Workforce Development Manager

Luis Amar, Technical Coordinator

- Welcome from the Chairs
 - [Kenneth Wells](#), the Advisory Council Chair, gave a brief welcome and reflection of the Advisory Council's work over the past year.
 - [Jon Caffery](#), the JTO Task Force Chair, also reflected on his experience with the JTO Task Force and celebrated their successes thus far, including many formal recommendations made to the SOMAH PA. He also expresses gratitude for how well SOMAH runs these meetings, how informative they are and how much they have helped to make critical decisions.
- Overview of SOMAH Advisory Council
 - Marisa Villarreal provided an overview of the Advisory Council purpose, role, priorities and focus areas, and key decisions and input.

- SOMAH Advisory Council Purpose: To ensure community advocates' voices and interests remain at the forefront of the SOMAH program. For key advocate organizations and stakeholders to contribute to program development and implementation, and ensure that SOMAH maximizes benefits to the communities it was intended to serve
- SOMAH Advisory Council Role: Advise and guide the SOMAH PA on program implementation, to ensure historically-excluded communities voices are represented in the development of program strategies.
- Advisory Council Priorities & Focus Areas: Property owner diversity and barriers to entry
 - Balance of Track A (property-owner) and Track B (contractor) applications
 - Property type diversity (size, type, geography)
 - Barriers to entry for property owners
- Job training requirements, local hiring initiatives, & job placement outcomes
 - Ensuring that the job training requirements are serving trainees and setting them up for success in the solar field (incentivizing “gold-star” contractors)
 - Create viable pathways from entry-level (installer) to leadership.
 - Develop model workforce standards that can help drive improvements and better standards in the solar industry
- Contractor diversity, barriers to entry
 - Contractors have equitable access to participate
 - Contractor diversity (race, gender, size, geography)
 - Barriers to entry for contractor
- Tenant engagement, education, and protections
 - Ensure tenants are receiving cost-savings, and remain at the forefront of the program
 - Tenants are participating as trainees
 - Energy education and referrals to other energy efficiency programs
 - Uphold equity
 - Ensure equity is considered and upheld across all program areas
 - Incentivize contractors to prioritize and uphold equity and diversity goals
 - COVID-19 pandemic impacts

- Track and understand impacts on solar and affordable housing industries, especially tenants and economic recovery
 - Explore how SOMAH can be part of a broader economic recovery strategy
 - Marketing, education, and outreach:
 - Strategies, geographic gaps, impact of outreach
 - Key AC Decisions/Input
 - Application management: conditional lottery process
 - Barriers to entry: progress payments
 - Letters of support:
 - SOMAH funding true-up
 - Progress payments
 - Annual Marketing Education & Outreach Plan review and input
- Overview of JTO Task Force
 - Daryl Lambert provided an overview of the JTO Task Force purpose, goals, priorities, and description of the three topic-focused working groups (opportunity accessibility, long term career advancement, and JTO engagement.)
 -
- Highlight areas of common interest & provide relevant program updates
 - Staci Hoell highlighted the four overlapping areas of interest for the two groups:
 - Maximize SOMAH training opportunities for long-term career advancement
 - Serve as a model for local hiring and workforce development
 - Contractor diversity
 - Equity and accessibility of job training opportunities
- Program Updates:
 - Luis Amar provided the following program updates:
 - Applications by IOU territories: Liberty 2, Pacificorp 1, PG&E 194, SCE 125, SDG&E 69
 - Graph of reserved incentives by IOU territory: \$161 million reserved, waitlist \$208,000
 - Contractor participation: Graph of applications received by contractor: 10 participating contractors out of 118 eligible contractors and average cost/watt by contractor
 - Geographic diversity: graph with 40 counties, 739 trainee opportunities by utility

- Map of SOMAH eligible properties in DACs
- Map of SOMAH registered job trainees, job training organizations and SOMAH applications
- Regulatory Updates:
 - Staci Hoell provided the following regulatory updates:
 - Progress Payments: Supplemental advice letter filed before Thanksgiving to address feedback from IOUs
 - Petition for Modification: In May of 2020 Sunrun/CalSSA/Brightline Defense proposed keeping incentive levels at launch levels through mid-2021
 - CSE-AL-114: Conditional Lottery: June 2020: Filed advice letter for modification regarding pipeline management in case of high volume

3rd Party Evaluation Recommendation Discussion

Chris Walker, Program Director

Chris Walker led a discussion of two key recommendations from the [SOMAH program Phase I evaluation](#).

Recommendation 2: Tighten workforce requirements

Chris gave an overview of the findings from the report:

- “The SOMAH PA defines and emphasizes local and targeted hiring practices; however, there is a lack of clarity on how success will be measured”
- “ambiguity exists around the extent to which the SOMAH Program seeks to identify and engage trainees that reside in the communities the program aims to serve”
- “Consider setting goals and year-over-year benchmarks for trainees from the groups delineated by the SOMAH PA”
- “Explore ways to support and develop trainees from smaller contracting firms”

Chris highlighted the accompanying recommendation from the evaluators:

“Tighten the workforce development requirements to ensure the job seeker benefits are being applied to the intended populations through the following actions.

- Consider setting goals and year-over-year benchmarks for trainees from the groups delineated by the SOMAH PA to provide insight into the program's

progress in training local and underserved groups.

- Explore ways to support and develop trainees from smaller contracting firms.
- In the spirit of broadly sharing the benefits of the program, explore the extent to which the SOMAH Program might provide additional workforce development to smaller contractors who can help diversify the overall participant pool."

Chris reviewed SOMAH's [definition of a local and targeted hire](#).

Discussion questions

1. We encourage rather than require local and targeted hiring for SOMAH JT opportunities. How can we ensure that job training benefits are reaching local and targeted hires?
 - Is a goal of ensuring at least 50% of training opportunities go to local or targeted hires sufficient? Why or why not?

Group Blue:

- "Require" is a key part because although the training is there to support students, the job/career pathway is more challenging or less available.
- Having those connections is key and for economic recovery specifically during times of COVID - specially for our targeted area
- "Local" definition could be redefined to allow for some flexibility and accessibility- very dependant on the region
- Can we find housing in counties that have more SOMAH training opportunities for trainees?
- maybe a weighted option or rubric so that we can stay targeted but flexible
- Property owner perspective: Ensure that all requirements are met- the language has to clear and specific or they won't be met

Group Gold:

- Looking at existing data to see if we can define meaningful targets
- Is county wide too large in terms of geography
- Start with jobs that have started and see where those trainees are coming from (not a lot of data right now) -- use this as a baseline
- Not a lot of projects underway, compared to proposed projects. Trainee Data is not yet available (should we wait to create a benchmark or do we set targets now?)
- Data comparison of DEI Hires on SOMAH projects vs. Cal Solar/Solar Foundation Map.
- Create model now (categories; women hires, gender identity groups, geographic differences, ethnic groups) - RE Slide 49 categories
- Setting targets for individual targeted categories
- Aiming for hard 100% on local hire, being strategic on targeted hires.
 - i. Reservations: Geographic locations across larger counties; folks being ready but cross county lines are more restrictive/punitive.
- What are the relationships with JTO's in DACs? Is there special attention being paid to groups who work with priority populations?

- Contractors are motivated to satisfy minimum requirements.
- Setting benchmark of 50% local and hire, and “double counting” prospective trainee’s.

Group Green:

- Jon: JTO TF has had these discussions about the limitations of defining local hires by county lines
 - Radius around a project would likely be a better option to define local
- Mandating percentage of local/targeted hires may create other problems: those issues would have to be addressed first
 - Manny: Agrees w/ idea around radius
 - Kenneth: How can we work closely with contractors to highlight benefits of local hiring
 - How do contractor’s look for JTs?
 - Provide guidance around how to prioritize local and targeted hires.
 - Ex. Provide list of local JTs
- Other ways to support local/targeted hiring:
 - Tenant Engagement
 - Bridging the gap between contractors and the local community: who should contractor’s reach out to?
 - Perhaps where the CBOs come into play
 - Could we utilize the property list/maps: share with contractors so that they can approach the POs
 - We need to understand whos doing what
 - Display JTOs and CBOs so that they’re all being contacted and involved in this process
- What’s a good benchmark?
 - Current baseline to start with and then work on improving that baseline
 - Let’s get closer to (35th?) percentile
 - There’s a lot of eligible local/targeted folks to hire
 - “We should get all 48% of local hires in the job portal hired”

Group Orange:

- What are the numbers of trainees? Where is the baseline? If we don’t know it is hard to answer the question. There is a data lag
- At Brightline we are believers of mandatory hiring of local employees.
- Seeing the lack of diversity in the industry, how can we improve that? Dr. Smith it should be at least 50% and go as high as 100%
- JB: the policy should be proactive at making local hires. You can’t get the money unless you have at least 50% of local hires. Should we be stricter? Yes, from a contractor perspective this may be different. I imagine that some already meet these goals and hire via the dashboard. Should be more than encouraging.
- Stephen: Are there folks who are well equipped and trained? If we move

into making it a requirement are we confident that we are not creating a challenge to be able to finish the project? All of the requirements of the program are inhibiting contractor participation.

- Eddie: It depends on region, the Bay Area is fairly robust, but the Central Valley is probably very different

2. What JT-related barriers exist for smaller contractors? How can the PA support smaller contractors on JT requirements?

Group Blue:

- Insurance support/workers compensation provided through SOMAH- cost and time restraints (higher for trainees or new employees rather than a journeyman)
- Federal bonding? Other incentives?
- Pay requirement
- Show a long-term positive outcomes for the contractor using visuals and graphics- helps to sell-it!
- Build confidence with the contractors that the trainees are certified and properly trained in order to pay higher wages
- Building relationships with JTOs and contractors to solidify pipelines for trainees

Group Gold:

- Create opportunities for smaller contractors to get on these jobs. Small contractors are open to these goals, they are in the community and they work within the community as well.
- Bid from a small contractor is a big investment that can be a barrier for a smaller contractor. Lots of up front costs.

Group Green:

- Kenneth: Smaller contractors need to be available and have the capacity
 - Support smaller contractors with connections/resources to access workers
 - Ex. Kenneth needed 20 individuals for a project, called temp outsource they sent over resumes, he was desperate to hire (huge bonus if they had experience)
 - Create a spectrum of support/services -- up to direct placement of workers
 - Outsourced employees aren't a liability to contractors + contractors don't have to do the onboarding process
- Manny:
 - Smaller contracts aren't able to utilize the resources larger contractors have
 - Ex. Hiring, onboarding, training new hires all takes time and

resources

Group Orange:

- Stephen: Most contractors don't have people working on policy or people aside from the essential jobs. They may not have someone on staff to complete the application, I wish we had a smaller contractor that could speak to that.
- JB: I used to work at a small contractor, they had a limited crew and hiring more people was really hard. I recognize from a size perspective is hard to have large crews.
- Eddie: GoSolar SF: they would have a credit if a person was a previous local hire, it wouldn't be good to penalize someone either.
- JB: some organizations already have commitments to hire locally. They may have apprenticeships, and formerly incarcerated programs, then they have to juggle new folks

3. Do we need to adjust how we support career development and barrier removal?

Group Blue:

- The work being done is great and of course can also always be improved - continue the conversations and relationship building
- Efforts needed to connect to tenant involvement and engagement with JTOs/contractors
- Make sure that the resources and help is clearly provided/accessible for the trainees- ex: bus route, housing, etc. (mentor, case manager, or other role to be there from the beginning)
- Can SOMAH have a fund for barrier removal- transportation tickets, housing, ability to renew driver's license
- Need to have constant contact and communication follow ups with trainees signed up on platform - word of mouth has a large impact

Group Gold:

Group Green:

- Manny: Transportation stipends, and other wraparound services available in those areas.
 - Work towards getting a vehicle to be more employable
 - Resources around public transportation
- Somebody who can help and provide these resources along the way
- Kenneth: +1 on the resources
 - SOMAH continue sharing seminars + training
 - Connecting w/ other local organizations already in these communities and connect them w/ SOMAH resources to share
- Esther: Do we have resources/training around job search skills, resume writing, etc?
- Manny: JTO TF has discussed mentorship

- Someone to support the trainee + provide advice/guidance

Group Orange:

- What actions are being done currently? We have done workshops for interview practice, resume development. We have a COVID-19 resources page and webinar. SOMAH is hiring for workforce development intern and an ME&O staff.
- Dr. Smith: Key is the relationship with the JTO, in my case there is a career development piece in place and facilitates barrier removal.
- I defer to others who do this work if any adjustments are required. Are your programs getting through?

4. Do we need to adjust the number of trainees or hours by project size?

Group Blue:

- JTO TF suggested having an additional tier
- Breaking down by trainee role too (pre-install, post-install)
- The more trainees we can introduce, the more will make a career of

Group Gold:

- JTO TF came to an agreement to expand the amount of trainee's based on project size.
- Current projects; are there opportunities that are being fulfilled? Do contractors have issues getting trainee's?
- Tiering of projects that increase number of trainees.

Group Green:

- Jon: increase it by 1 trainee on every step, and add another step for larger projects-- ex. 500kW and above be its own step
 - Kenneth: +1
 - Chris: Does that create another barrier for small contractors?
 - Kenneth: besides the point if we provide the adequate resources to support smaller contractors
- Closing thought: we need more smaller contractors: we need to support them: benefits them and benefits SOMAH

Group Orange:

- I think we should increase more trainees, I can see 2 or 3 trainees for 50 to 150 kW an increase one more trainee by category. Same amount of hours
- Barriers depend on the region,
- JB: I've never been able to understand SOMAH's goals or success, is it number of trainees? Number of hours? Is a proportionality issue, is it more

racial diversity? How is success determined? Can they perform the job? Is hard for me to answer that question. It should be number of full time jobs, how many are moved into the clean energy field?

- That is the goal we are working toward, there are large forces impacting, we are struggling to hire more people because of the rush of the ITC. When COVID hit completely changed the picture, some of this is out of our control.

Finding 3: Applicant Diversity

Finding 3: Upon launching, the SOMAH Program experienced an influx of applications, driven largely by a small number of businesses that were prepared for, and actively awaiting, the program launch. Importantly, the SOMAH Program was designed to encourage diverse contractor participation and create opportunities for small contractors and property owners to participate in the program; however, existing efforts may need to be augmented to bring about broader, more diverse program participation. The evaluation team notes that instituting a lottery system to replace the current “first come, first served” approach to applications could increase participation and diversity among property owners and contractors, in terms of size, location, and previous program participation.

Recommendation 3:

- Consider progressive, year-over-year goals and benchmarks on applicant diversity. The tracking of applicant diversity could be expanded to include business ownership characteristics, such as women, minority, disabled veteran, and LGBT-owned businesses, as called out in SB 255.
- In Phase II of the evaluation the PA and evaluators should explore program participation barriers small contractors face and whether setting caps on large solar contractor applications would help ensure participation among property owners and a more diverse set of contractor applications. Additionally, research should be conducted to better understand the extent to which large contractors may be employing the smaller contractors as subcontractors for SOMAH projects.
- In future evaluations, consider conducting interviews with contractors who have completed projects and who have the eligibility training but have not participated in the SOMAH Program to understand participation barriers.
- Future evaluations should consider conducting interviews with property owners who have been approached by the SOMAH PA or their CBO partners, or who have registered interest in SOMAH, but have not submitted an application to assess whether current outreach is sufficient to successfully introduce property owners into the program and through the application process. If it is deemed insufficient, identify ways to restructure outreach and/or technical assistance to bring more property owners into the application pipeline.
- In Phase II of the evaluation, explore the degree to which program financing and access to capital is a barrier to participation for smaller contractors and property owners who are unable to float the cost of the system until the incentive

is paid.

Discussion questions:

1. What does success look like for year-over-year for contractor participation? How should we weigh the participation of subcontractors?

Group Blue:

- The smaller contractors, Women and minority owned stopped participating in SOMAH because of the cumbersome process, lacking bandwidth, and up-front costs (Not surprising)
- Barrier- small contractors connecting with affordable housing owners
- Property owner perspective- marketed to by multiple contractors and subcontractors

Group Gold:

- Would want data on the subcontractors -- what level of work are they doing and what's their relationship w trainees. Lots of subcontractors doing specialized work. -- these should be off limits for consideration in contractor diversity -- should be solar specific and substantial
- Small contractors involved for SOMAH projects (may use subs for parts of project; roofing, electrician, etc)
- Sunrun diversifies their subs after submitting multiple bids for projects.
- Spreading the wealth (RE Chart in slides) around diversity of contractors, who is the broker for the availability of trainee positions.

Group Green:

- Stuart's 1st concern:
 - Sunrun is dominating projects/incentives
 - Would like to see the breakdown of the subcontractors: ex. Who are the subcontractors of Sunrun?
 - Sunrun needs to help SOMAH accomplish SOMAH goals if they're going to have so much incentive
- Stephen:
 - Could there be a cap around amount of the funding one contractor takes up
- Andres: Likes the idea around cap-- its about capacity: large contractors are going to be able to get more projects v. smaller contractors
 - Cap would be the easy fix
 - Once company dominating 70% isn't allowing for the growth we want to see
 - Lottery pool? But it needs to go even above that
 - We need to make sure there isn't a monopoly
- Stephen:
 - Even if there was a requirement, you may still run into issues where even less capacity would be taken in the program
 - Create program requirements that make this program attractive to

smaller contractors

- Chris: SOMAH is thinking of capacity building to support smaller contractors vs creating a cap
- Back to main question: what does success look like for year-over-year contractor participation?
 - Stephen: solar on multifamily housing = hard nut to crack

Group Orange:

- Outreach, work with CALSSA to get more contractor diversity. I'm working for a small commercial company and they didn't know about the program.
- Good rapport, communication and certifications. Certifications make them more employable, they keep the participants employed with subcontractors.
- Esther: would like to hear more from folks working in the program.
- Should the goal be introducing subcontractors into the program? I think you want a bit of both, we know the money is made as a lead of the contract. We should have both, some subcontractors can do the job well but don't have the skills to do the applications and understand the program.
- Should the PA take care of some admin work?
- The PA has done some outreach, you can apply to be a small contractor and you can get a request to bid for a job.
- Some are ready to bid for a job, trainees will be able to build a networking system participating in the program
- Success means no turnover, constantly filling those positions,

2. How might a contractor participation cap impact the program?

Group Blue:

- The incentive level goes down per year
- The idea of the cap would encourage more small contractors to participate b/c it limits the larger companies
- Monitor this throughout the year
- Always look for ways to make it easier for smaller contractors before we cap for larger contractors to make sure we are meeting SOMAH install goals
- Concerns: that smaller contractors trying to take on small property owners won't have capacity, therefore those opportunities could go to the larger contractors (cap allowing)

Group Gold:

- Force diversity by implementing CAP to create more opportunities for smaller contractors.
- Breakout smaller companies that Sunrun has subbed to understand the depth of who is doing the work.
- What qualifies a subcontractor? What company actually contracted to do install and hire the solar trainees.

- Can cut off biggest suppliers, different avenues are analyzing data of who they are subbing to.
- Data shown online can turnoff smaller contractors from bidding, encourage bids by leveling the playing field.
- Tiered approach that sets aside projects for smaller contractors.
- Small contractors may not have the resources to get to installation goals.

Group Green:

Group Orange:

- Is it the cap on the amount of contractors? No, it's the amount of projects per contractor
- Ken: where the program is now it would hurt it more, the ones that apply is because they have the knowledge of the program. Educating small contractors will be a challenge
- Doesn't mean you can't put enfasis in a small contractor list, you can diversify to work with smaller contractors using Track A
- Track A has a bidding process but hasn't been very popular.
- Competitive bidding should always be a part of the program.
- We talked about it in the AC one time, if someone is bringing projects.
- You could ask for a competitive bidding on Track B.
- Esther: is there a need for technical assistance to be part of the process and do the bidding?
- We have Track A free technical assistance where contractors get the report to be able to bid on. Track B also has free technical assistance

3. What resources might support capacity building for small to medium sized businesses and minority-, women-, and LGBT-owned solar businesses? Follow up Question → Categories of barriers to bear in mind: finance, customer acquisition, technical complexity (VNEM), program complexity (requirements, admin)

Group Blue:

- More outreach/relationship building to small contractors
- SOMAH consolidates updated lead generation of eligible locations that contractors can come into contact with
- Identify these categories and provide targeted outreach to these companies for additional support
- Support systems for these groups through the process- tutoring, coaching, 1 on 1 support
- Creative education and training that is on-going
- Short-cut/cheat sheet for the handbook to make it all more digestible

Group Gold:

- Guarantee qualified/approved contractors that can win a bid and hand off to their supplier that provides them with ability to get materials for job and start. (address financial ability to get capital to start projects)
- Temporary loans (no/low) interest, revolving loans.
- Targeting advertising to the community, contractor mentorship to get

through the process.

- SOMAH Acting as purchasing agent (buying in bulk)
- SOMAH operating as a purchasing agent for small contractors once a bid is awarded.

Group Green:

- Incentive money upfront to entice a contractor in
 - Include hard requirements for the contractor to get out value
 - SOMAH PA to support smaller contractors on the paperwork/financial side
- Stephen: Hard to find eligible multifamily properties, for small contractors it's a tall order to identify a property that checks all the boxes
 - Wes: SOMAH PA find the small properties and connect with small contractors-- intentional outreach
 - SOMAH PA help create those connections

Group Orange:

- Esther: Startup costs to setup the business, not sure if there are grants or seed money that can be researched for minority or women owned businesses.
- Ken: As a small to medium size business having lines of credit with distributors will be resourceful. Milestone payments can help so we are not waiting 90 days after install. Tracking projects closer or get extension on the rebates, etc.
- We engage contractors that would have a pipeline for projects and pipelines of trainees. Building capacity around potential trainees, working with CBOs, we try to identify contractors who want to provide potential job opportunities.

4. How might applicant diversity impact training opportunities, local economic development, and the diversity of project type and size? → Will this lead to smaller properties being engaged?

Group Blue:

Group Gold:

Group Green:

- Andres: By diversifying the applicant pool, smaller contractors will likely have an easier time engaging with local/targeted hires
 - Smaller contractors may have an easier time engaging and securing local hires.
 - There's a potential for closer connection
- Chris: Are smaller properties inherently harder to reach?

Group Orange:

- I think so because there is a lot of opportunity there. When you have employers that can hire from the communities they will hire locally.
- I think the bigger issue is that there are no diverse commercial companies. There are few of us, you are going to have a lack of participation because they are very few and they are very constrained. Do we even know how many contractors we should have? What is a real number of what that looks like and how many minority owned are there that can do this type of work?
- If we could we would hire all of the local trainees
- COVID is making it harder in addition to the challenges.
- Would like to see numbers on what is happening, are there real opportunities for small contractors? Show them how it would benefit their business, show how tenants are benefited
- Esther: Has there been a survey or assessment, maybe a focus group study on what their challenges and barriers especially during COVID time.

Year in Review:

- Successful & engaging remote meetings
- Maintained full membership
- Set guiding values, priorities, and visions for success
- Ad hoc meetings to discuss COVID impacts and finalize bylaws
- JTO Task Force working groups
- Support for program updates and proposals:
 - Progress payments
 - Application lottery
 - Incentive step down
 - Handbook updates
 - ME&O strategies
 - Job trainee success

Next Steps and wrap up

- SOMAH Q4 Public Forum:
 - Wednesday, Dec. 9, 1:00-3:30PM
- Interview workshop in Q1:
 - Volunteers needed
- Stipend checks
- Monthly newsletter
- Exit survey