

SOMAH Public Forum Notes

Date: Wednesday, August 25, 2022

Time: 1:00-2:45 p.m.

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. In this forum, the SOMAH PA gave a program update and shared initial learnings and insights from the evaluation of SOMAH's tenant education work, as well as future initiatives and programmatic changes to improve tenant education in the program.

The forum is 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

Marisa Villarreal, SOMAH Program Manager, kicked off the meeting by welcoming attendees and explaining the purpose of the forum. Marisa stated the SOMAH PA's commitment to equity and the energy and environmental justice principles that the SOMAH Program is founded on. Marisa reviewed the forum agenda and meeting guidelines and acknowledged the SOMAH Program Administrator team.

Session 1: SOMAH Program Update

Walther Perez, SOMAH Workforce Development Manager, presented key program updates and statistics:

Utility Territory	# of Active Applications	Available Funding Remaining
Pacific Gas & Electric	230	~\$135,978,553
Southern California Edison	144	~\$212,787,645
San Diego Gas & Electric	50	~\$49,911,256

PacifiCorp	1	~\$6,335,208
Liberty Utilities	2	~\$1,470,907
Totals	427	\$406.5 million

The SOMAH PA is proud to report that 35% of SOMAH's active applications are located in disadvantaged communities (DACs), and ~87% of the solar credits from SOMAH projects will be allocated directly to tenants. Active applications are also estimated to serve more than 53,881 tenants with an average system size of 170 kW. There are currently 14 participating contractors in the program, with 12 additional subcontractors reported at this time. The pipeline also supports 783 training opportunities with more than 51,000 projected training hours. These job training opportunities equate to over \$1M in projected wages leveraging over 65 job training organization relationships.

To date, 41 progress payments have been issued for PG&E, SCE and SDG&E projects, with six additional projects under review and upcoming payments shortly. These 41 progress payments total to just over \$7.9 million. Fifty-three final incentive payments have been issued to PG&E, SDG&E and SCE projects totaling over \$16 million. SOMAH has fully completed 51 projects, with 9.3 MW of electricity serving over 49,500 tenant units across the state.

In the previous public forum, the SOMAH PA presented plans to file a petition for modification that would adjust the programs incentive levels and eliminate the current annual incentive step-down methodology. This incentives petition for modification was officially filed to the CPUC on August 11, 2022. Further updates on the status of the petition for modification will be provided to our listserv subscribers via email.

Walther provided an overview of SOMAH's resources, including its suite of technical assistance and support services such as job training support and tenant education and the SOMAH eligible properties map that is available for interested applicants. Walther ended by celebrating completed SOMAH projects and highlighting a success story of a completed SOMAH project at Cottonwood Creek Apartments in Suisun City. Read the full success story here: calsomah.org/education-resources/cottonwood-creek-solar-project-offers-much-needed-relief-families.

Session 2: Tenant Education Updates & Future Strategies

Sarah Salem, Tenant Services & CBO Senior Manager, kicked off the session by reviewing the current tenant education (TE) requirements for SOMAH Program participants, as listed in the affidavit for TE:

- Provide SOMAH-approved education materials to all tenants 60 days or fewer prior to the start of construction via either of the following methods:

- (1) Direct delivery to residents OR mailer sent via U.S. Postal Service.
- (2) At least one or more of the following: Email notification, tenant meeting or workshop, or other.

SOMAH's Tenant Education Toolkit includes the required materials in seven languages. These flyers address what tenants can expect with SOMAH, how tenants' utility bills will change and information on the Energy Savings Assistance (ESA) program for each utility.

Sana Sheikholeslami, Tenant Services & CBO Specialist, shared the findings from the SOMAH PA's latest Tenant Education Survey, which was launched as a pilot project in Q1 2022. Thirty surveys were sent to all 30 units of a completed SOMAH project. Residents at this property had received a few cycles of their new bill that included SOMAH bill credits. The surveys were sent as mailers and residents mailed back their responses in prepaid envelopes. The SOMAH PA estimated the surveys would take about 20 minutes to complete, and they included an incentive to compensate residents for their time and to encourage folks to return the surveys.

The goals of this survey were to hear directly from residents in buildings with SOMAH to learn about their experience with SOMAH TE efforts and program impacts – including high-level questions around utility bill changes. The PA also wanted to learn more about how it could better and further support tenants with SOMAH.

Pilot survey results:

- Ten out of 30 surveys were returned.
- Seven out of those 10 residents received and reviewed at least one SOMAH Tenant Education Material.
- Nine out of those 10 residents expressed interest in learning more about topics related to solar and SOMAH.
- It was encouraging to see that for the majority, utility bills decreased, and bills likely did not increase for any residents.
- For those who didn't see a change – this is another area where TE around energy savings and the ESA program could be beneficial.

The following is data from 93 SOMAH projects that have completed both components of the TE requirement and reported to the SOMAH PA as of this week:

- Method 1
 - Direct delivery is the most popular method for delivering educational materials, with 87 of the projects doing so.
 - Six projects delivered educational materials to tenants via USPS mail.
- Method 2 – the more open-ended requirement requiring a second touch point with the material.
 - TE efforts vary from making hard copies available in community areas and door notices to phone calls and workshops.
 - Hard copies being made available in the community area is the most popular followed by email and then resident door notices.
 - The SOMAH PA is grappling with how effective these more passive

methods of tenant engagement are and how TE efforts can be improved to best engage residents.

Sarah reviewed some of the tenant feedback and reflections the PA has received through in-person TE workshops and focus groups sessions. Tenants were asked pre- and post-workshop questions and gave positive comments and feedback to the PA team regarding workshop content and structure. From assessing tenants' pre- and post-install workshop reflections, the PA found that certain information may be more relevant to share at different points of the SOMAH project timeline.

Sarah shared the SOMAH PA's proposed changes to TE requirements and timeline:

TE Requirement #1

- NEW handbook language:
 - Provide the following SOMAH-approved education materials to all tenants 60 days or more before install:
 - Get paid to install solar
 - What to expect with SOMAH
 - Site safety map
- CHANGE to handbook language:
 - The host customer or property owner is to share the following education materials 60 days or more after the install:
 - IOU ESA Materials
 - How will your utility bill change?
 - Simple ways to save on energy

TE Requirement #2

- NEW handbook language:
 - In addition to contractor training, an online Tenant Education Training is required by:
 - Track A: Host Customer/Property Owner
 - Track B: Contractors

Initiatives for additional Tenant Education support:

- SOMAH Welcome Letter to all tenants provided by the PA
- PA-hosted on-site manager training for host customers/property owners
- SOMAH Tenant Education wellness checks

Sarah conducted a poll with forum attendees:

- Do you support the proposed changes to tenant education requirements?
 - Strongly support (20% of votes)
 - Somewhat support (30% of votes)
 - Neutral (40% of votes)
 - Somewhat do not support (10% of votes)
 - Do not support at all

Discussion Questions

1. Do you think these changes will help ensure tenants are more centered in the SOMAH Program?
2. What challenges do you think you will face with these changes?
3. What support would you need from the SOMAH PA to help your team transition to the new TE requirements?

Session 2 Q&A

Q: John Davis, CalSolar: CalSolar has worked on several SOMAH projects. As a contractor that is focusing on scaling and trying to deliver to our portfolio partners, there is no issue providing educational materials to tenants. We would really lean on the SOMAH PA for some of the details that should be consistent throughout the program. Questions posed to tenants, such as what they knew about the program before and after, could be handled programmatically to avoid putting extra weight on the contractors. What we can do best as a contractor is making sure all the details of that particular site and job training opportunities are passed down to the people on-site. We do our best, but tenant education is not our specialty.

A: Thank you for your feedback. That's what the SOMAH PA has been learning, especially for Track B projects that are contractor-led. We're not expecting contractors to be TE experts. We have free TE services that we encourage you all to take advantage of. Before we move forward with these proposed changes, we encourage you all to reach out to the PA and voice your concerns. We do not want to make the program more burdensome. Our goal is to achieve the best quality of care for the tenants. Beyond providing the educational materials for you to share, we hope that participants take more advantage of all the TE services we offer.

Q: Michael Sanchez, GRID Alternatives: Could you explain what "Direct Delivery" refers to under TE Requirement #1 Method 1? Is that emailing?

A: Direct delivery under Method 1 is either mailing by USPS or direct delivery to each tenant (e.g., slipping fliers under their door). It is to ensure that each tenant has a hard copy of the educational materials.

Q: Andrew, SunRun: We know utilities manage billing for all tenants. It would be great to somehow have utility support to include pamphlets along with the bills so that tenants can see the additional items right then and there.

A: Co-marketing with those bills is a great idea. Bills are what tenants pay most attention to, so having some material to include in their first bill cycle with the VNEM would be helpful. We previously started working with the IOUs to create such materials and plan on revisiting this during the process of revising the TE requirements.

Q: Andrew, SunRun: We have encountered an issue with common area billing on the property side post-installation. Property managers (POs) have had questions on billing. We have contacted PG&E and were referred to their general solar hotline. We potentially see more needs for bill audit or support services. It seemed like some POs were getting extra charges on their common area bill post-installation. We can route our clients to the utility companies, but I would imagine questions getting stuck in the pipeline. It would be great to have support from the SOMAH PA on this.

A: Thanks for highlighting that. We will make sure our Property Owner team takes that into consideration.

Q: Richard: I am new to SOMAH. How do tenants get paid and how can they benefit from installing solar?

A: Tenants benefit from SOMAH solar by receiving credits on their energy bills. The metering system measures how much energy is being generated from the system and allocates a certain amount of that energy to each tenant. Tenant bills are then reduced after deducting the actual amount of energy they used during that bill cycle. They do not receive a check, they just see a reduction in their bill. The energy generated by the system, their energy usage and the energy allocation to their unit are all factors in determining their final bill. As noted during Session 1, the PA is seeing 85% of overall energy allocations go toward tenant units (with the remainder going toward common area usage).

A: To answer the second part of your question – with every SOMAH project, the contractor is required to hire 1-2 trainees and pay them for work. The number of trainees depends on the size of the system being installed. Tenants are eligible to participate in these paid job training opportunities, as well as students and graduates from local solar job training programs we partner with. We encourage contractors to work with property owners and on-site property managers if they are interested in hiring tenants. They can use our SOMAH job training portal. There are lots of opportunities for tenants to engage and receive solar job training.

Sarah concluded the session by reviewing the TE timeline and next steps:

Q3 & Q4 2022:

- Stakeholder engagement
- Revise TE materials to align with expected changes
- Share changes and procedures with stakeholders

Q1 2023:

- In-text change to handbook

- Submit to the CPUC (California Public Utilities Commission)
- Implement changes by March 2023

Looking Ahead & Next Steps

Marisa Villarreal wrapped up the forum by highlighting the following upcoming SOMAH events:

- **Sep 29:** Applicant & Contractor Eligibility Training
- **Oct 13:** Tenant Education Training
- **Nov 2:** Q4 Public Forum (*pending cancellation*)
- **Dec 8:** Applicant & Contractor Eligibility Training

Register at calsomah.org/events

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