

Meeting Notes

Solar on Multifamily Affordable Housing (SOMAH) Advisory Council & JTO Task Force Meeting Q3 2024

September 6, 2024
Virtual Meeting

Attendees

SOMAH Program Administrator Team

Minerva Defee | SOMAH Program Manager
Brittany Chenier | SOMAH Program Manager
Luke Ballweber | SOMAH Program Manager
Staci Rivas | SOMAH Program Manager
Ingrid Murillo | SOMAH Program Manager
Stacey Lee | SOMAH Program Coordinator
Nic Muñoz-Proulx | SOMAH Program Coordinator
Monica De La Cruz | SOMAH Program Coordinator
Alessandra Gonzales | SOMAH Program Coordinator
Jacqueline Rogge | SOMAH Program Coordinator
Sabryna Barrios | SOMAH Program Coordinator

SOMAH Advisory Council

AJ Perkins | Instant ON
Alma Marquez | Independent Consultant
Andrea Barnier | Self-Help Enterprises
Carlos Aguilar | Coalition for Economic Survival
Christian Cruz | Clean Power Alliance
Elizabeth Elliott | Kashia Housing Authority
Jakobi Ewart | The Niles Foundation
Jeff Strickland | Plus Power
Ken Wells | O&M Solar Services
Nicole Lim | California Indian Museum & Cultural Center
Andres Ramirez | People for Mobility Justice

SOMAH JTO Task Force

Hattie Wyatt | Young Community Developers
Jon Caffery | Saddleback College
Dr. Mitchell Smith | Young Community Developers
Senait Forthal | OC Go Solar
Wanda Rogers | SoCal Pre-Apprenticeship
Wshana Moss | The Niles Foundation

Guests

Jose Gonzalez | Self-Help Enterprises, SOMAH CBO Partner

Sarah Lerhaupt | California Public Utilities Commission, Energy Division

Not in attendance:

Janie Hodge | Paving the Way Foundation, JTO Task Force

Jeff Trirogoff | Elements of Earth & Energy, JTO Task Force

Wes Olson | Center for Employment Training - Oxnard, JTO Task Force

Meeting Agenda

1. Welcome & Introductions
2. Session 1: SOMAH Program Update
3. Session 2: Chair Elections & Breakout Discussions
4. Session 3: Policy Updates
5. Wrap Up & Next Steps

Meeting Notes

Session 1: SOMAH Program Update

Mina Defee, SOMAH Program Manager

Brittany Chenier, SOMAH Program Manager

Jacqueline Rogge, SOMAH Program Coordinator

Sabryna Barrios, SOMAH Program Coordinator

Staci Rivas, SOMAH Program Manager

Mina Defee presented the latest program stats and SOMAH PA members shared progress on outreach across different program areas.

Notes

- Marketing, Engagement & Outreach (ME&O)
 - Mix of online, in-person and digital outreach efforts.
 - Campaigns are geared toward contractors, engaging them with SOMAH and the program's benefits and technical assistance.
 - Paid ads and biannual newsletter that includes the program's latest wins and successes, as well as upcoming opportunities to connect with the PA.
 - The recently completed installation at [St. Mary's Gardens](#) was SOMAH's first Track A project and showcases what these three partner organizations have achieved together (see [video](#)).

- Much of our efforts focus on increasing applications and staying true to our commitment to tenants.
- Have seen increases in tenant education workshops, with the support of CBO partners and other stakeholders.
- Property Owner Outreach
 - Property owner outreach focuses on priority groups including tribes (particularly in SCE and SDG&E territories), public housing authorities, DACs, and canceled applications.
 - Have contacted 422 unique organizations through these efforts.
 - Completed several in-person presentations, including to the City of Santa Ana and the City of Irvine, to grow the network and build relationships.
- Workforce Development (WFD) Outreach
 - Focus on three audiences: job trainees, contractors and job training organizations (JTOs).
 - Trainees engaged through JTOs and their students, CBO partners and tenants.
 - Currently 95 SOMAH-eligible JTOs in our directory.
- Contractor Outreach
 - Outreach has focused on email, phone calls in Pacificorp and Liberty territories, tribal-owned companies and canceled applications to invite them to resubmit.
 - Host webinars and workshops:
 - Upcoming webinar will be on how to reach out to eligible properties.
 - This is a direct outcome of a survey conducted earlier this year, in which contractors expressed the need for resources, guidance and support.

Discussion

AC Member: Does the job training result in a certification or is it just hands-on training?

- **SOMAH PA:** A lot of it is hands-on training that counts toward apprenticeship training hours.
- **AC Member:** Training is great, and we should also continue thinking about long-term work opportunities, which are key for these communities.

AC Member: How many of these trainees are placed in long-term jobs?

- **SOMAH PA:** Around 30% of trainees are hired after they complete their work on SOMAH projects. It depends on the needs of the contractors and if they have any positions available. While the PA cannot require contractors to hire trainees full-time, we do highly encourage it. We focus our webinars and education on the benefits of hiring trainees for long-term positions.

AC Member: Are job training opportunities promoted in languages other than English?

- **SOMAH PA:** Flyers are provided in English and Spanish, which are the languages JTOs request the most for their students.

AC Member: Are job training opportunities open to previously incarcerated youth or individuals? It would be great for those folks to be able to participate as well.

- **SOMAH PA:** Yes. In the last year, one of the trainees hired full-time was someone who had previously experienced the justice system. We hosted a [fair chance hiring webinar](#) on the benefits of hiring justice system-impacted individuals. We have found that residential solar is more reticent on hiring individuals from that population because of the need for workers to enter private homes. Commercial solar seems to be more open to it.
- **AC Member:** I agree that there is more hesitation for residential solar. There is more education that we need to do around the benefits to contractors. I like to highlight companies like Ken Wells' and some in the Bay Area that have had success in hiring individuals who need a second chance.
- **AC Member:** Is there a chance to spotlight a successful case study so that folks can put a face to the story, and they are not just reading about the benefits?
- **AC Member:** That is an excellent idea.
- **SOMAH PA:** That is a great idea. We want to be sensitive about what trainees and contractors want to share with the public. Some are very private, but we will keep this in mind going forward.

AC Member: Could you share the feedback you received from the contractor survey?

- **SOMAH PA:** A lot of our feedback was centered around how property owners can be approached and benefit from SOMAH. This helped us build out our marketing toolkit for contractors and the eligible properties map to support their outreach to property owners. Many of the contractors wanted to learn about the program, find more eligible properties and receive more technical assistance.

AC Member: It seems the eligible properties dataset is missing who the actual owner is. Is that correct?

- **SOMAH PA:** Yes, the property identifier is missing, so there would need to be some additional investigation to contact them.
- **SOMAH PA:** The street number and contact information is personal identifiable information that we cannot share. We have received feedback that it does take some work to identify who they are. Even if we were able to share contacts, we have found there is a decent amount of turnover, so it is not a guaranteed that the contact information will be accurate.
- **AC Member:** I appreciate the information. It may be more effective to outreach to a property with 10 properties rather than a bottom up approach of identifying individual buildings. I agree that it makes sense to make the contractors do this. If the

information is stale, it would be a waste of everyone's time.

AC Member: Does the PA send out prequalification outreach letters to eligible properties?

- **SOMAH PA:** We send direct letters encouraging them to check out the incentive calculator. Sometimes we share qualification information as well. We have used the tactic of sending Solar Preview Reports to gain interest, but only occasionally when the Technical Assistance (TA) team has the capacity to generate the reports. There are so many qualification requirements that it is hard to confirm eligibility without speaking to the property owner.

AC Member: There is a longer wait time for properties to receive a TA lite report. Is there any work being done to expedite the process? As a CBO partner, we have found it is usually the first hook to get contractors interested, and the wait time could make that lead go cold.

- **SOMAH PA:** We updated the TA lite report format to be condensed to two pages, which has helped with turnaround time. There have been some internal staff changes that have led to longer timelines. Once that is settled, we should revert to the one-week timeline. If there is anything we can do in the meantime, we are happy to chat over a call to help keep these leads warm. Thanks for calling attention to this.

Session 2: Chair Elections & Breakout Discussions

Advisory Council Breakout

Stacey Lee, SOMAH Program Coordinator

Nic Munoz-Proulx, SOMAH Tenant Engagement Manager

Stacey provided an overview of the Advisory Council chair and vice chair roles. Candidates Ken Wells, AJ Perkins and Christian Cruz each gave a speech to express their interest and qualifications for a position. AC members voted for chair and vice chair during the meeting via a survey. The elected chairs will be announced in a post-meeting email.

Nic provided an update on the program's tenant engagement (TE) efforts and what the future of this service will look like.

Notes

- Services include TE 101 coordination meetings and webinars for POs and contractors and in-person workshops for tenants (pre and post-installation).
 - 101 meetings often lead to in-person workshops, which the PA highly encourages and supports.
- Workshop requests have grown a lot and show strong demand for in-language, on-site engagement.

- Twenty workshops requested so far in 2024, compared to four in 2021 and 2022 and 13 in 2023.
 - Six of this year's workshops had language interpretation.
 - Four workshops were conducted to meet their tenant education requirement, three were for continued tenant education (CTE).
 - Four workshops were supported by CBO partners.
- It costs the PA an average of \$827 to host a workshop.
- Capacity and budget are limited to meet this demand statewide, so creative solutions are needed to continue offering quality in-person TE.
- What the PA is doing now:
 - Reallocating MEO budget to increase TE funding from \$3K to \$5K for the year.
 - Leveraging CBO partners and PA staff who are local to where workshops are being held.
 - Streamlining inventory of TE materials.
 - Revamping and condensing TE materials to be more accessible and digestible.
- What the PA plans to do:
 - Share workshop expenses with the host customer.
 - Create an equity index to prioritize workshop requests when we can't meet every property request.
 - Offer virtual services when possible.
 - Center youth in our engagement efforts.
 - Continue to consider how we support gap regions to meet an increase in requests given the staff capacity and budget constraints.

Discussion

AC Member: How are we measuring our success with TE?

- **SOMAH PA:** We are continually tracking workshop attendance. The relationship developed with the on-site property manager also shows success because it allows us to follow up and hear what questions and concerns are continuing to come up for tenants. In the past, we have done tenant surveys and focus groups on the TE materials and incorporated that feedback to create more effective and useful materials.

AC Member: How has engagement at these workshops been? Do you conduct surveys? Have they recommended the workshops to others through word of mouth?

- **SOMAH PA:** The tenants who have attended have been really engaged and curious to learn about SOMAH, though it varies depending on the phase the SOMAH project is in. Pre-installation questions are more abstract; CTE questions are more specific about their bills. The workshop requests have really come from the property managers that want to bring them to their community, rather than individual tenants.

AC Member: Would it be feasible to host regional workshops with multiple properties? Could we use an exemplary project as a site to recruit ambassadors and host educational events?

- **SOMAH PA:** We have been trying to group by region to cut travel costs for the PA, as well as considering building relationships with developers with larger portfolios so they can have a trained TE expert on their staff or conduct TE efforts in groups with multiple properties in their portfolio.

AC Member: Are CBOs involved in the TE revamp? They have expertise in their communities that can inform the TE material revisions.

- **SOMAH PA:** There is a CBO working group as well as meetings with CBOs through each step of the materials revision process.

JTO Task Force Breakout

Mina Defee, SOMAH Program Manager

Mina provided an overview of the JTO Task Force chair and vice chair roles. Candidates Jon Caffery and Jeff Trirogoff each gave a short speech to express their interest and qualifications for either position. JTO Task Force members voted for chair and vice chair during the meeting via a survey which was also shared with members not in attendance after the meeting to gather a majority vote.

Mina gathered feedback on the SOMAH PA's proposal to sunset the JTO Task Force earlier than anticipated.

Notes

- We are now five years into the SOMAH program and experiencing a decreasing budget for program administration.
- *Original timeline:*
 - 2024-2025: New and final cohorts for both AC and JTO TF. Joint meetings twice a year rather than once.
 - 2026-2028: Single Advisory Body (13-15 members total – adding 2-4 JTO seats)
- *New proposed timeline:*
 - 2024: Last year of two separate advisory bodies. Sunset formal JTO Task Force at the end of the year.
 - 2026 - 2028: Move forward with a single advisory body (an Advisory Council of 13-15 members total – adding 2-4 JTO seats)
 - 2028: Sunset the advisory body
- As we are thinking about how to best use our resources and right size our program, we are considering sunsetting the JTO task force earlier than 2028 but would like to hear the JTO Task Force's thoughts first.
- Proposed next steps and timeline
 - September – Discussion with JTO Task Force (now)
 - Review proposed timeline

- Explore the possibility of creating a WFD working group.
 - September – Open applications for the Advisory Council
 - Up to four members can transition over to the AC.
 - October & November - Interview and selection process
 - December – Last meeting with the full JTO Task Force
 - March 2025 – First meeting of new and updated Advisory Council
- Selection process
 - Survey current members. If no more than four members are interested in joining the AC, they would move over automatically. If more than four are interested, there will be a short application, interview and selection process.
- Things to consider (open for discussion)
 - Priority for past and current chairs/vice-chairs.
 - Priority for new members.
 - Application design – should it be longer or shorter?
 - Selection committee – Thinking of recruiting AC members but are open to including non-returning JTO TF members.
 - Number of members (note that the Advisory council will eventually decrease in size overall as well).
 - Remainder of the 2025 term – Four JTO Task Force members
 - Subsequent years – Only WFD-focused seats

Discussion

JTO TF Member: Could you clarify the reasons why you would like to disband the Task Force early? How would combining the AC and JTO TF work?

- **SOMAH PA:** Meetings for each advisory group have had a lot of overlapping content for the past year or so. It would be more efficient and save PA staff a lot of time to plan meetings for a single group rather than two groups per quarter. Additionally, our administrative budget is decreasing and will continue to decrease each year. We want to explore ways to right size the program while continuing to offer our services and meet program goals.

JTO TF Member: Has the AC done similar work to the JTO TF? My understanding is that our group did a lot of work as far as writing standards and changes for the PA to incorporate into the program handbook.

- **SOMAH PA:** The AC and JTO TF are both advisory bodies. The JTO TF is focused on the WFD piece whereas the AC is focused on the program as a whole and advising on outreach and strategy for all audience types. Transferring JTO TF members to the AC will ensure WFD is still a large consideration moving forward, it just won't be as big of a group as it is now.
- **SOMAH PA:** In my experience with both advisory groups, the JTO TF is more actionable in terms of what we do in getting out and talking to folks about the program. For example, last year, we worked on the letter for the apprenticeship

program. The AC could use more of that task-oriented approach. My hope is that by joining these bodies, the JTO TF can spur that engagement.

JTO TF Member: Were there sustainability or continuation requirements for the program?

- **SOMAH PA:** SOMAH ends in 2032, and the program administration team will end at that point as well. The CPUC will still have oversight after the program ends.

JTO TF Member: I imagine it was a hard decision for the PA to make. All good things must come to an end. I enjoyed working with these members and the discussions were tremendous. I am okay with the proposed plan. The process seems clear and equitable.

JTO TF Member: As one of the new members, I enjoy this committee and look forward to what the future brings. I appreciate the PA bringing awareness to this.

JTO TF Member: I agree with the process and am glad you are sharing this. I am excited to see where things go from here.

JTO TF Member: If this makes the most sense for SOMAH, I am okay with it. I will continue to support where I can.

JTO TF Member: I am in support. We made a lot of progress and accomplished what we set out to do. Combining advisory bodies is a great idea as we have quite a few experts here who can contribute to the AC. We should make sure there is regional representation and a diversity of experts.

- **SOMAH PA:** Based on this discussion, it would be great for the selection committee to be made up of both the AC and JTO TF members, if possible. The PA also echoes the importance of regional representation. We will send a follow-up email with next steps. The JTO Task Force chair and vice chair will have one more meeting in Q4 with their official titles. The PA will stay in touch with you all as the program unfolds.

Session 3: Policy Update

Mina Defee, SOMAH Program Manager

Mina provided an overview of proposed legislation Assembly Bill 3121 and its potential impact on SOMAH program funds. The bill was pulled by its author on August 30, 2024.

Wrap-up & Next Steps

Stacey Lee, SOMAH Program Coordinator

Stacey reviewed action items and administrative reminders for the AC. The Q4 meeting will be another joint meeting between the AC and JTO Task Force and is expected to take place in early December.