

Meeting Notes

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

Q4 2021 December 10th, 2021 Remote Meeting

Attendees

SOMAH Program Administrators:

Chris Walker | SOMAH Program Director, GRID Alternatives

Luis Amar | SOMAH Technical Coordinator, GRID Alternatives

Marisa Villarreal | SOMAH Program Manager, GRID Alternatives

Ingrid Murillo | Workforce Development Associate, GRID Alternatives

Sarah Salem | SOMAH Tenant Services & CBO Manager, GRID Alternatives

Brittany Chenier | SOMAH Marketing Education & Outreach Manager, GRID Alternatives

Staci Hoell | SOMAH Workforce Development Manager, GRID Alternatives

Sana Sheikholeslami | CBO and Tenant Services Coordinator, GRID Alternatives

Chiara Arellano | JTO Engagement Lead, Rising Sun Center for Opportunity

Jacqueline Rogge | Trainee Resource and Engagement Lead, Rising Sun Center for Opportunity

Stephanie Tsai | Chief Program Officer, Rising Sun Center for Opportunity

Jae Berg | Senior Manager & Program Lead, Center for Sustainable Energy

Monica De la Cruz | Marketing, Education & Outreach Manager, Environmental Health

Coalition

SOMAH Advisory Council Members

Agustin Cabrera | RePower LA

Allan Rago | Quality Conservation Services

Alma Marquez | Independent Consultant

Andrea Barnier | Self-Help Enterprises

Andres Ramirez | People for Mobility Justice

Carlos Aguilar | Coalition for Economic Survival

Elizabeth C Elliot | Northern Circle Indian Housing Authority

Jakobi Ewart | The Niles Foundation

JB Tengco | BlueGreen Alliance

Nicole Lim | California Indian Museum & Cultural Center

SOMAH JTO Task Force Members

Cesar Montemayor | Proteus Inc.

Eddie Ahn | Brightline Defense

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 Dr. Mitchell Smith | Young Community Developers

Meeting Agenda

- 1. Welcome, Meeting Overview, Introductions, Icebreaker
- 2. Session 1: Advisory Council and JTO Task Force Overview
- 3. Session 2: 2022 Priorities & Strategic Planning
- 4. Session 2: Discussion of Priority Areas of Engagement for Upcoming Term
- 5. Wrap Up & Next Steps

Welcome, Introductions

Staci Hoell, SOMAH Workforce Development Manager, GRID Alternatives

Staci Hoell opened the meeting with an overview of the meeting goals, group agreements, and agenda. Hoell gave closing remarks for the JTO Task Force as this meeting marked the conclusion of the body's first two year term. The SOMAH PA facilitation team then introduced themselves briefly with names, pronouns, and roles.

- Highlights of the JTO Task Force 1st Term:
 - 45+ hours of SOMAH contributions
 - 3 focus area working groups
 - 23 recommendations made to the SOMAH PA
 - Thanks extended to members who will not be returning for the second term

Icebreaker

AC Members and Task Force members were then sorted into breakout groups where they introduced themselves, the organization they represent, and answered icebreaker questions to get to know each other. The groups reconvened and shared highlights from their conversations.

Advisory Council and JTO Task Force Overview

Chiara Arellano, JTO Engagement Lead Staci Hoell, Workforce Development Manager



Chiara Arellano provided an overview of the SOMAH Advisory Council (AC) purpose, goals, priorities, and successes from the last term. Arellano then provided an overview of the (Job Training Organization) JTO Task Force purpose, goals, priorities, and description of the three topic-focused working groups (1. Opportunity Accessibility, 2. Long Term Career Advancement, and 3. JTO Engagement).

SOMAH Advisory Council Overview

- Purpose: To ensure community advocates' voices and interests remain at the
 forefront of the SOMAH program. For the 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.
 - o The AC was formed based on the model of the DAC Advisory Group
 - The AC meets quarterly and has sessions and discussions that span program topics:
 - Tenants rights / Economic justice
 - Environmental Justice
 - Labor / Workforce Development (not JTO)
 - Multifamily affordable housing
 - Solar developers
 - Indigenous / Tribal communities
 - Public sector

• SOMAH AC Priorities & Focus Areas:

- Increasing participation of underserved communities (tribal communities, DACs, rural communities, geographic gaps)
- Property owner diversity and barriers to entry (size, type, geographic location)
- Job training requirements, local hiring initiatives, job placement outcomes (ensuring that opportunities lead to high road pathways, developing model workforce standards)
- Marketing, education, outreach
- Contractor diversity / barriers to entry
- Tenant engagement, education, and protections
- Uphold equity (throughout all program areas, encouraging contractors to uphold equity in workforce side of program)
- COVID-19 pandemic impacts (how can SOMAH be a part of a broader economic recovery, providing financial relief for tenants)

SOMAH AC Successes

- o True-up funding of approximately \$94 million achieved
- Helped move forward program changes



- Conditional Lottery for managing the application pipeline during times of high volume/waitlist
- Require notification for early job trainee termination to ensure contractor is still meeting job training requirement
- Adjustment so that system changes/additions affect incentive amounts
- Progress payment option for applications so that there is not an upfront payment burden

SOMAH Job Training Organization (JTO) Task Force Overview

- Purpose: To ensure that Job Training Organizations' voices and interests remain at the forefront of the SOMAH program's job training efforts and that trainees have a meaningful and career-advancing experience.
- Priorities & Focus Areas:
 - Creating job pathways that lead to long term careers
 - Developing tools & identifying best practices to be used by SOMAH stakeholders
 - Build network of JTOs to share resources and best practices
 - Establish metrics to evaluate inclusivity + accessibility of opportunities, and placement success
 - o Center student participation needs, identify resources to meet them

JTO Task Force Focus Areas

- o In order to give enough space to discuss and execute actions regarding the above mentioned priorities, the Task Force organized into workgroups that convene once per quarter in addition to the full group quarterly meeting. These workgroups distilled the priorities to 3 main areas of focus:
 - Job Training Organization Engagement
 - Opportunity Accessibility
 - Long-term Employment

• Summarized JTO TF Recommendations given to SOMAH PA

- Staci Hoell then provided a summary of the recommendations that the JTO TF provided to the SOMAH Program Administrator team over the course of the past term, including a status update for each recommendation. The full list of recommendations is as follows:
 - Increase trainee communication throughout their SOMAH journey
 - Completed: Developed detailed trainee communication plan
 - In progress: Launching monthly newsletter in 2022
 - Facilitate JTO-employer engagement and feedback
 - In progress: Developing a JTO-employer engagement toolkit
 - Increase transparency of upcoming projects and promote proactive engagement with contractors for trainee placement
 - **Completed:** Increased requirement to post job from 30 to 60 days before installation begins



- In progress: Increasing team capacity to support each contractor with trainee recruitment
- Ways to showcase SOMAH opportunities (marquee projects, site visits)
 - On hold: COVID-19 challenges with having groups visit a jobsite
- Develop safety resources and training
 - In progress: OSHA-10 training + jobsite safety guide
- Increase accessibility for underrepresented groups
 - Completed: Fair Chance Hiring Workshop for Employers
 - In progress: Exploring mentorship opportunities for trainees
- Address barriers to employment: transportation, access to tools, case management services
 - In progress: Creating a directory of local supportive resources + surveying contractors to understand transportation and tool offerings
- Ensuring trainees have all the information they need
 - Complete: Code of conduct + Know Your Employment Rights Workshop + welcome email to all new trainees
 - In progress: Job portal guide and support
- Trainee pay (scaled with experience/certifications)
 - In progress: Exploration phase, surveying contractors on compensation
- Increase # of trainees with larger projects
 - On hold: Will add this into the next handbook update in 2023
- Eligibility extension for trainees who's eligibility expired in the first two years of the program
 - In progress: Confirmation received from the CPUC to extend.
 Need to create official framework and vote.
- Expanding training roles (operations/maintenance, energy auditing)
 - In progress: Surveying contractors to understand what roles they are hiring for
 - On hold: Add additional roles for job trainees to the handbook.
 Need to understand the options and feasibility.

AC & JTO Task Force Shared Areas of Interest for Future Discussion

Based on these overviews, Chiara Arellano then reviewed the areas of overlap and shared interest of the two bodies in order to frame the upcoming meeting discussion. These coalescing themes were directly pulled from a pre-meeting survey of the AC and JTO TF members asking **what their top areas of interest/priorities were in moving into the second term**. These themes were outlined as follows:

- Reflections on what has been done thus far as a program
- Increasing contractor diversity emphasis on small contractors specifically
- Increasing projects in DACs/hard to reach areas (rural, tribal, far Northern CA) holding space to discuss equitable outreach to these specific communities
- Discuss how the industry has changed thus far, how to keep current on technological advances
- Recruiting from tenants for workforce requirements



- Trainee access/diversity (specific focus on re-entry trainees)/onsite equity/inclusion
- Program outreach "Getting the word out"

2022 Priorities & Strategic Planning Discussions

Staci Hoell, Workforce Development Manager Chris Walker, Program Director

Staci Hoell began Session 2 with an overview of high level program updates and outlined the SOMAH PA's priorities and plans for 2022. The data below was sourced from the SOMAH Public Forum hosted in November. The Program is currently working on completing the Semi-Annual Progress Report, which is scheduled to be published in January 2022.

Program Stats & Status

- SOMAH Installation Projects Updates
 - 486 applications submitted Q4 saw a spike in applications submitted prior to the incentive downstep
 - o **32%** of active applications are in DACs
 - o \$172.75 million in funding that's been reserved
 - \$248.08 million funding remaining
 - o 39,583 tenant units served
 - o 88% of electricity going directly to tenant units
 - 160 kW average system size
 - 15 out of 100+ eligible SOMAH contractors are participating in the program, a slight increase since last year
 - 8 subcontractors 2021 was the first year the program gathered data on subcontractors as well
 - 11 projects have been fully completed, serving over 1,000 tenant units.
 Approximately half of the completed projects are in DACs
 - o 150 more projects are nearing completion in the first half of 2022.

• Workforce Development Updates

- 735 job training opportunities projected
- 50,000 projected training hours
- \$1M+ in projected wages
- Leveraging ~60 JTO relationships to recruit trainees for these positions
- 81 job seekers connected to 22 projects in 2021
- o **363** trainees signed up on SOMAH Job Portal
- 83.33% of hired job trainees were local (lives within the county of the project) or targeted hires (those within identified groups facing barriers to employment)
- At least **5 trainees** offered full time positions after



- Code of Conduct Update AC and TF helped review the final draft. This was a product that came out of discussions on the Task Force about trainee experiences on the job site and how to lay out expectations for safety, treatment of trainees, and respect of labor laws. It will be going through a review process before being added to the latest Handbook update in Jan.
- Overview of SOMAH Ribbon Cutting events in 2021 Staci provided photos and updates on two ribbon cutting events for SOMAH projects that highlighted the experiences of the job trainees and tenants experiences.

Questions and Comments

- JTO TF Member Inquiring about gathering information on trainees that continue working part-time on multiple jobs after the fact
- o **PA Member** The stat of how many trainees have been offered full time positions is anecdotal. We do try to gather that information via post-project surveys to the contractors and trainees. This number was gathered just from conversations directly with contractors or JTOs. We're thinking that the number is actually higher given that this doesn't capture all who might be part time or still hired on in some capacity.
- JTO TF Member It would be good to know to be able to understand how many trainees are eligible upon finishing their term for full time hire, and if that number is still fairly low then understanding what we're missing in using these experiences to prepare them.

SOMAH PA Goals & Priorities for 2022

Chris Walker then explained the PA's Goals & Priorities for 2022. These goals aim to move the program towards its overarching goal of installing 300 megawatts of solar on multifamily housing by 2030, and are as follows:

- 1. **To increase the program pipeline** have about 79 megawatts currently reserved, thus need to add ~217 megawatts to reach our 2030 goal, with time towards the end of the program to sunset the program. Avg project size is ~150 kW, thus we will need ~1600/1800 projects to meet the program goal. Cannot capture all the other co-benefits of the SOMAH program without projects in the pipeline.
 - Reevaluate & expand program services (App support and technical assistance, as the application process is bureaucratic and a heavy lift).
 - Streamline the customer journey (app resources & communication)
 - Enlist additional trusted messengers to co-market SOMAH (gov. entities, IOUs, CCAs, CBOs, "ambassadors". Gain programmatic recognition by now sharing success stories and partnering with trusted entities)
 - Make targeted improvements to SOMAH's financial value proposition



(adjusting incentives, app fee waivers, connecting to financial services - have programmatic discretion within the group to be able to change the definition of targeted group)

- Continue participant research (surveys, focus groups)
- 2. To measure and increase participation of underserved communities SOMAH program receives its funding from CA Cap & Trade program, thus using these funds to reinvest in underserved communities is a key focus. Expanding this conversation beyond recognized DACs as well to include groups that are excluded by this definition, such as tribal communities, farmworker housing, etc.
 - a. Handbook 5.0 updates: Formalized DAC goal and application deposit waivers (Jan 2022 submittal)
 - b. Focused ME&O efforts (direct outreach, co-marketing, targeted ads + campaigns)
 - c. New DAC Goal: 40% of participating properties by 2026
- 3. **Increase participant diversity** Diversity of the properties and of the contractors that are currently participating. Make sure we are creating avenues for new subcontractors and primary contractors, specifically small businesses and minority owned.
 - a. Reevaluate & expand program services (App support & Technical Assistance)
 - b. Continued participant research (surveys, focus groups)
 - c. Focused ME&O efforts (direct outreach, co-marketing, targeted ads + campaigns)

Questions and Comments

- **JTO TF Member** As distributed resource management becomes more critical in the state and requirements for storage with solar become more of a requirement/mandate, do you foresee needing to have more storage on our projects? If so, will the storage kW number as well be included in the generation number, the overall 300 megawatts you outlined?
- PA Member No, the 300 mW is strictly the solar capacity we have to reach to obtain our program goal. Through our 3rd party evaluation process we learned that about 70% of our applicants claimed to pair their solar with a battery storage system. But currently SOMAH and SGIP do not overlap/work well in conjunction. Have been working on troubleshooting these programmatic incompatibilities. Will take some work and advocacy to the utilities to make these work well together, and that will likely play out through a tier 3 regulatory process, so lots of public engagement and the commission will ultimately need to vote on that. But we do want to be able to pair SOMAH solar systems with SGIP storage systems.
- JTO TF Member So SOMAH will not be used for any battery storage on the property?



• PA Member - Yes.

SOMAH PA Goals & Priorities: 2022 ME&O Plan Goals

Chris Walker presented on the SOMAH PA's interrelated planning goals including the 2022 Marketing, Education & Outreach (ME&O) Plan, an update to the SOMAH Handbook, and unpacking responses to recommendations from the third party evaluation. The ME&O Plan is in the review and finalization stage.

Core Goals for 2022 ME&O Plan:

- 1. Engage property owners to build and maintain a multiyear pipeline of diverse projects
- 2. Continue to build a robust and **diverse contractor base** and support eligible contractor retention
- 3. Ensure **sufficient job trainee participation and preparation** for SOMAH job training opportunities or relevant careers
- 4. Educate SOMAH-eligible tenants and tenants living in participating SOMAH properties about the program and how to maximize their benefits (ex. encouraging energy efficiency to make SOMAH credits go farther)
- 5. Ensure stakeholders are **informed of and helping to co-market** the program

Estimated budget will be approx \$3 million. Plan will be shared in early 2022 for comment period and review.

Questions and Comments

- **JTO TF Member**: The incentives have dropped down while construction prices have increased due to inflation. Meanwhile we're trying to increase trainees on the job. How will these cost constraints affect the effort to bring in smaller contractors/diversity of contractors since price is always a main barrier. Second question, how to account for areas that may not be designated as DACs, but have a lot of affordable housing (ex. given of Irvine CA).
- PA Member: Not within the PA discretion to create an incentive change, would have to navigate a lengthy, likely contentious Handbook change to make that happen. That being said, there is some support from 3rd Party Evaluations noting that SOMAH is not a market transformation program. Also launched SOMAH with intention of the solar energy system serving tenants should be free, or as close as possible. So it does occur to us that we've had 0 new applications since the incentive step down. Know that we have the curve of early adopters, early majority, late majority, and laggers. All the early adopters have already applied. So how do we make the program attractive to late majority and laggers as we decrease our incentives. Internally evaluating what incentive rates can get us to our programmatic goals.
- PA Member: In response to question re: deed restrictions and where properties
 are located, we're grappling with that and discussing how well meaning
 requirements are potentially locking people out of the program we did not
 mean to lock out
- **AC Member**: In identifying Native American owned businesses in terms of contractor diversity, are you using the SBA definition?



- **PA Member**: We are not locking ourselves to those definitions. In general we want more tribal participation, so we're not locking ourselves to those.
- AC Member: In terms of developing criteria, are you working with anyone or is that something we can contribute to? Have some ideas on how to make it more inclusive
- **PA Member**: Absolutely, this discussion happening at multiple different levels. Partners at Energy Division, CA Housing Partnership Division, and the Advisory Council seats developed to bring in that expertise/perspective since we need help in developing that strategy. Looking forward to digging in with you.

Strategic Planning Discussions

Staci Hoell, Workforce Development Manager

Staci Hoell introduced the discussion section of the agenda. The discussion was broken into two sessions, each focusing on a core discussion theme. TF and AC members were able to self-select into discussion breakout rooms based on certain areas of focus within each of these themes. PA members were in each breakout room to facilitate and record notes, and then each breakout group was able to share out their top points upon reconvening with the full group.

Theme 1: SOMAH Training opportunities remaining relevant and meeting demand in an ever evolving industry.

Theme 1 Background:

- Relevant to both the AC and JTO TF because job training is central throughout the program. This encompasses the general industry shifts we've seen, changes in licensing requirements, etc.
- Is the training being offered the right training for industry needs?
- Gather context Where did the industry start, and what are we seeing now?
- **Labor supply issues** High demand for solar workers, but low enrollment in solar programs; How to meet demand when JTOs are closing their doors?
- The PA is moving forward with developing a Contractor/Employer Needs Assessment - What do we need to learn from employers re: hiring challenges, needs, what are their current hiring practices, rates of compensation, etc? Use this information to better adapt our trainee placement process.

Breakout Room Areas of Focus:

- Relevant Training Making sure that training is applicable to employerneeds
- Sufficient Pay how to ensure the industry's compensation is competitive
- Emerging Technologies how to stay on top of these changes



Discussion Group Share Outs:

Relevant Training

<u>Breakout Room Notes + Jamboard</u>

- PA Member Facilitator: Discussed recent licensing requirements changes (CSLB ruling).
- The different types of education that are important to have
- One JTO TF Member's expertise with community college system route how classes in solar used to be really large, now have seen a decrease without a real explanation why. Perspective from JTO TF Member on his program's orientation from the community side
- JTO TF Member: Also brought up WIOA again how that can really help the tribal communities/other underserved communities on how to get connected to a JTO. Those career centers aren't the JTO themself, but they can refer and pass folks along to us. If the student doesn't have the transportation, tools, etc required, that's where the WIOA funds come in. One crucial thing they do is screen the students for us. They go through personality checks (ex. Myers Briggs) and line them up with jobs that suit them. Trying to line them up for pathways they'll excel in before they get to the community college and try something they don't like. Very important. We need to use those resources more in the coming years.

Sufficient Pay

Breakout Room Notes + Jamboard

- **PA Member Facilitator**: It's complicated there are many reasons you'd want to increase wages and many reasons not to do it.
- To the extent that we're hiring folks from DACs, we need those wages to be as high as possible for people to survive
- Counterpoint, it could create false expectations for trainees to be paid at higher rates and then enter the industry and face a wage decrease for their long term position.
- With high trainee wages, could bump up to other levels of pay rates for more senior staff members on the long term team.
- Sometimes in energy efficiency space contractors are set up in a low-bid model.
 Increasing wages can impact competitive edge and make business unsustainable.
- Discussed what makes a job desirable in general good benefits, provides a career ladder, good work environment, transportation
- Contractors bid at a certain price initially, but then must try to stay true to that initial bid so can't adjust wages as much in the process

Emerging Technologies

Breakout Room Notes + Jamboard

• PA Member Facilitator: Battery storage, EV chargers, solar paint, window



- technology, controls for energy saving all kinds of new tech moving onto the market and creating new workforce demands
- AC Member mentioned that the labor side is adaptable and can adapt its
 training, but needs to be hearing from employers maybe SOMAH's role is
 surveying employers within our network and be able to pass that information to
 our JTO partners so that if needed they can adapt their training to these
 workforce needs.

Theme 2: Increasing participation of underserved communities beyond DACs

Theme 2 Background:

- PA has set explicit targets around DAC participation already How can we encourage participation from other underserved, priority communities that fall beyond the DAC designation?
- Participation = SOMAH's key audiences (property owners, contractors, trainees)
 - Contractor participation and diversity specifically smaller contractors
 - Trainees engaged
 - Properties/tenants receiving benefits of SOMAH installation
- For each of the three below-mentioned communities of priority, discussion groups will discuss:
 - What are the unique considerations or characteristics of engaging that community? Are there any unique challenges to note?
 - How do we engage property owners/tenants in these communities in order for them to receive the benefits of SOMAH?
 - How can we engage trainees from these communities and expand JTO networks in these areas?
 - How to engage contractors from these communities / employ local + targeted hire to keep workforce benefits within the community
 - NOTE: The discussion regarding re-entry/justice system impacted individuals varied slightly to focus on how to promote fair chance hiring practices and how contractors might best support this demographic of potential employees.

Breakout Room Communities of Focus:

- Tribal Communities
- Rural Communities
- Re-entry/Justice System Impacted individuals

Discussion Group Share Outs:

Tribal Communities



Breakout Room Notes + Jamboard

- **PA Member Facilitator**: AC Member provided extensive expertise regarding how SOMAH needs to begin the process of engaging tribal communities there are many unique characteristics of these communities (legally and politically) regarding tribal sovereignty, tribal recognition, and land rights/who owns the land and thus properties. Because of these very unique legal characteristics and barriers, property ownership looks very different.
- Given the current list of eligibility requirements for SOMAH, these communities are not fully in line w/ these characteristics.
- Takeaway we will have to invest time in crafting applicable parameters specific
 to tribes so that we are not unintentionally excluding these communities or
 properties based on our current programmatic framework
- First step = prior to engaging tribes, SOMAH hire in experts to provide internal education necessary on tribal history, sovereignty, legacies of how these legal and political structures will inform this engagement so that that labor is not unintentionally placed on our tribal partners down the road

Rural Communities

Breakout Room Notes + Jamboard

- PA Member Facilitator Emphasis on need for trust
- Transportation due to the spread and disconnection
- Lack of infrastructure for community engagement and information sharing
- Tap into community colleges as sources of trainees and info regarding the community in general
- Farmworker communities as a majority in rural areas when doing outreach consider seasonality as a factor. Time training and sharing of information around slower seasons
- For property owners due to trust issues and disconnect use peer to peer outreach. Perform in person outreach to have a presence, rather than trying to only engage through remote resources (Currently doing through CBOs but would like to fill in certain geographic gaps)
- Build paid SOMAH ambassadors to help build connection and share information
- Marketing through IOUs and local community radio stations
- Trainee engagement focus on tenants as major resource
- Engaging property owners in letting tenants know about jobs. However tenant/landlord relationships might not be the best so how to get outside avenues of info to tenants
- Engaging contractors How can SOMAH play a role in being an incubator and letting contractors in the area know. Getting them exposure to the solar scene

Justice Impacted Population

Breakout Room Notes + Jamboard

- **PA Member Facilitator** Key to make sure people have the correct information/facts regarding re-entry populations
- Racism and systemic biases (external/internal) play a large part in how folks see

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these individuals

- From contractor standpoint insurance as a barrier to fair chance hiring practices
- Despite these larger issues, there is a movement beginning w/ Ban the Box, Fair Chance movements, etc w/in CA
- Important to not just provide education, but wrap around services (technology, transportation, correct clothing/tools, etiquette for work, etc) - relate to the JTO TF work products that are being developed

Next Steps and Wrap Up

- Reminder of direct deposit set up for stipends
- Thanked and acknowledged JTO Task Force members who will not be returning for second term
- Reminder of upcoming Know Your Rights workshop
- Reminder of recruiting process for the Job Training Organization Task Force application deadline was extended. Please pass along to networks.
- Request for feedback on Job Readiness Rubric work product JTO resource