

Meeting Notes

Solar on Multifamily Affordable Housing (SOMAH) Advisory Council & JTO Task Force Meeting Q4 2023

December 8, 2023
Virtual Meeting

Attendees

SOMAH Program Administrator Team

Chris Walker | SOMAH Program Manager
Stacey Lee | SOMAH Program Coordinator
Hannah Warner | SOMAH Program Manager
Mina Defee | SOMAH Program Manager
Zara Jamshed | SOMAH Technical Manager
Walther Perez | SOMAH Program Manager
Brittany Chenier | SOMAH Program Manager
Shina Robinson | Asian Pacific Environmental Network, SOMAH CBO Partner

SOMAH Advisory Council

Agustin Cabrera | RePower LA
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
Kenneth Wells | O&M Solar Services

SOMAH JTO Task Force

Jon Caffery | Saddleback College/College of The Desert
Dr. Mitchell Smith | Young Community Developers
Genevieve Jones | Owens Valley Community Development Center
Jeff Trirogoff | Elements of Earth and Energy
Noah Arzola | William M. Maguy School of Education, Proteus Inc.
Wanda Rogers | San Diego Pre-Apprenticeship
Senait Forthal | OC Go Solar

Not in Attendance

Allan Rago | Quality Conservation Services (*Advisory Council*)
JB Tengco | BlueGreen Alliance (*Advisory Council*)
Nicole Lim | California Indian Museum & Cultural Center (*Advisory Council*)

Janie Hodge | Paving the Way Foundation (*JTO Task Force*)
Wes Olson | Center for Employment Training (*JTO Task Force*)

Meeting Agenda

1. Welcome & Introductions
2. Session 1: SOMAH Program & Policy Update
3. Session 2: End-of-Year Review & Looking Forward to 2024
4. Wrap-Up & Next Steps

Meeting Notes

Welcome & Introductions

Mina Defee, SOMAH Program Manager

Mina Defee welcomed attendees to the meeting. SOMAH PA members did a round of introductions, and AC and JTO Task Force members did introductions and icebreakers in breakout groups.

Session 1: SOMAH Program & Policy Update

Marisa Villarreal, SOMAH Program Manager
Hannah Keenan, SOMAH Program Manager

An overview of the legislative updates from SB 355 was presented. Major handbook changes include the program's extension until 2032 and program eligibility expanding from the strict term "building" to the more inclusive term "property," which includes mobile home communities. Area Median Income limits are expanded for income qualification and tribal and public housing authority projects now have new pathways to eligibility, while new construction projects are still not eligible.

An update was given on the third-party evaluation and the PA's response to recommendations.

The final third-party evaluation report can be found [here](#). The SOMAH PA's Response to Recommendations can be found on [California Public Utilities Commission \(CPUC\) website](#) under *Solar Evaluation Reports*.

Discussion

- **AC Member:** You will need to guarantee that non-recognized tribes don't hold sovereignty rights. They are usually treated as nonprofits or community-based organizations.
- **AC Member:** What are the new housing and construction restrictions?
 - **SOMAH PA:** Right now, new construction isn't eligible. New housing can now be considered. We are deciding how much the incentive would be.
- **JTO TF Member:** What incentives would there be for contractors?
 - **SOMAH PA:** It varies depending on the payment structure of the project.
- **JTO TF Member:** What does intentional support for workforce development mean?
 - **SOMAH PA:** An example would be the numerous ways in which our CBO partners support our WFD goals. They help reach out to the community about SOMAH training opportunities. They also oversee SOMAH's Heatspring Academy for trainees and potential trainees.
- **JTO TF Member:** We need to continue keeping WFD efforts at the forefront. There are a lot of opportunities in the industry – how can we get our graduates to these industry jobs?
- **JTO TF Member:** More questions could be included on the Job Trainee Survey, such as what are their motivations for participating in the program?
 - **SOMAH PA:** This data (such as trainee goals and expectations) is already being collected through our survey and will continue to inform our program moving forward.
- **JTO TF Member:** I'm concerned about the interconnection delay and how it could impact the different parties involved. As for the tenant ambassador role, is it volunteer or paid? Could it be incentivized? It's a great idea that encourages community.
 - **SOMAH PA:** We want to ensure we're compensating a resident for participating in the tenant ambassador program through a stipend.
- **AC Member:** We should have realistic, not ideal, timelines to share with tenants.
 - **SOMAH PA:** Yes, we're developing messaging to ensure that we're setting realistic expectations for residents.
- **CBO Partner:** I would be supportive of some kind of collective pressure. For our projects, sometimes it takes months to get any even small update from

the investor-owned utilities (IOU). It is important to clarify to the community that fast interconnection is not a realistic expectation.

- **SOMAH PA:** Thank you for all your helpful perspectives and for keeping tenant equity at the forefront. In looking at our program data and which projects are already seeing bill credits come through, a question that arose is how are we going to use this data we're collecting to improve this program? This is something the PA will continue to discuss. We also have people in our networks doing similar work such as piloting an ambassador program, and we would like to tap them for their insights.
- **AC Member:** In the beginning of the program, tenants wouldn't see their bill credits until six months after the project was completed. After interconnection delays, it'll be six months after PTO (and the interconnection delays), so it has gotten even longer. I'd love to talk with someone offline on how this can be improved for multiple parties.

Session 2: End-of-Year Review & Looking Forward to 2024

Hannah Keenan, SOMAH Program Manager

Zara Jamshed, SOMAH Technical Manager

Monica De La Cruz, SOMAH ME&O Sr. Specialist

Ingrid Murillo, SOMAH Workforce Development Sr. Program Manager

Nicole-Munoz Proulx, SOMAH Tenant Education Sr. Specialist

Alessandra Gonzales, SOMAH CBO Partnerships Sr. Specialist

SOMAH PA members presented updated program stats and the successes and challenges of each SOMAH program area this year.

Notes

Admin/Operations & Applications

- Successes
 - High incentives.
 - Verdant report and response.
 - Senate Bill (SB) 355.
 - PowerClerk updates and streamlines.
 - Prescreen affordability service.
- Challenges
 - New application volume up from 2022.

- Interconnection and bill credit timelines wanted to reiterate transparency and set expectations for tenants.
- Increasing contractor involvement by tracking diversity – trying to look at subcontractors as the main source of involvement. We think this is a way to bridge the diversity gap.
- Project completions, extension requests and delays have revolved around supply chain issues. This has been the main cause of delays.
- Plans for 2024
 - Sustaining new application volume: expand and put funds to effective use. Implementing SB 355 via handbook.
 - One more handbook change! This will increase eligibility.
 - Market and engage with newly eligible projects.
- Highlights:
 - Reached out to over 100 tribal groups in Q3 about SOMAH relationship potential.
 - How they fit in our SOMAH universe are questions we are asking ourselves.
 - Also connecting with tribal housing commissions.

Technical Assistance (TA)

- Successes
 - Encouraging TA reports.
 - Prioritizing TA lite reports for properties in disadvantaged communities (DACs).
 - TA preview reports – Very abridged version of normal report. Provides various analysis that encourages applications and gives a glimpse of financial standing.
- Fleet monitoring data collection has launched.
- Challenges
 - The landscape of the solar industry (costs, labor, etc.) is still feeling COVID market conditions.
 - Multifamily is siloed from other energy efficiency, clean mobility and storage programs.
 - SGIP collaboration is not feasible until new tariffs are approved.
- Plans for 2024
 - Attracting TA preview reports – advertising tool to bring in new applicants.
 - Amplify the Inflation Reduction Act (IRA) and other ways to fund projects.
 - Continue fleet monitoring program so tenants can track they are receiving benefits to their systems.

- Equity: Remove Expected Performance-Based Buydown (EPBB) calculator and increase tribal involvement and access to small contractors.

Marketing, Education & Outreach (MEO)

- Property Owner (PO) Outreach
 - Contacted at least 330 PO organizations, conducted PO webinars, attended tribal roundtables and PO conferences and established new co-marketing relationships.
- Successes
 - 27 new solar contractors, four new subcontractors.
 - Conducted subcontractor research and interviews, launched a social media campaign and conducted outreach to 29 contractors across utility territories.
 - Continued engaging audiences through new case studies and success stories, press releases, newsletters, CBO toolkits and events.
- Plans for 2024
 - Focus on the five MEO plan goals while also working on SB 355 implementation. Hoping to conduct the wins and uplifting our work by doing more ribbon cuttings and showcasing the impact of SOMAH.

Workforce Development

- Successes
 - Job safety binder finalized.
 - Heatspring Academy – Conducted trainee testing and increased promotion by CBO partners.
 - First round of job training portal updates completed 2023.
 - Analyzed initial workforce needs assessment findings (intended to gauge hiring, training and workforce needs outreach).
- Challenges
 - Small number of projects.
 - Policy changes.
 - No guarantee of employment.
 - Lack of training.
- Plans for 2024
 - AB 2143 prevailing wage requirement starts January 2024.
 - Second round of job training portal updates.
 - Focus on highlighting success stories.
 - Continuing engagement with all surveys.
 - Implement handbook changes per AB 2143 and SOMAH AC / JTO Task Force recommendations.

- Right size outreach to audiences.

Tenant Education (TE)

- Decoupled Tenant Engagement staff role with CBO partnerships manager role so that TE specialist can be the sole audience lead for tenants to maximize experiences and engagement with tenants.
- Successes
 - TE service requests are increasing.
 - Handbook changes are going to be revisited.
 - Conducted workshops in Bishop, Oakland, Palm Desert and Stockton.
 - Several languages were covered, and we were able to meet tenants where they needed support, including translation support and being present during convenient hours.
- Challenges
 - Property owner and contractor capacity.
- Plans for 2024
 - Prioritize people, community resilience, equity and useful collaboration.

CBO Partnerships

- Successes
 - CBO-led tenant education workshops increased.
 - Improved and streamlined administrative processes.
 - Utilization of CBO resource hub.
 - Hosted in-person summits for CBO partners.
- Challenges
 - Generating warm leads for property owners and stakeholder outreach
 - Limited capacity creates bottle necks.
- Plans for 2024
 - CBO scopes will focus on PO outreach (focusing on three property management companies per quarter), TE and local government outreach.
 - Determine how to serve gap regions.
 - Update CBO resources with information on SB 355.

Discussion

- **JTO TF Member:** Is there an update on the apprenticeship program?
 - **SOMAH PA:** We've been looking at potential opportunities and we found a company named Sustainedo that had submitted a grant, but it was not accepted. The reason given was that there are other programs providing the same service already.

- **JTO TF Member:** If we focus on site analysis, system design, safety, maintenance and storage, I imagine it could be accomplished. We need to avoid anything electrical or connection related.
- **AC Member:** What are the new solar goals for 2024?
 - **SOMAH PA:** We don't have a MW goal for 2024 specifically, but we've done a model on how many average number of applications we would need each year to meet our ultimate 300 MW goal. It's hard to be specific when it comes to applications because every project is different. We'd estimate the number of applications needed next year is 200, but it varies depending on system size per project. The two-year program extension can also be considered.
- **AC Member:** Are you looking to expand in DACs or with eligible properties wherever we can make connections?
 - **SOMAH PA:** Priority housing is being worked on given SB 355 updates and expanded eligibility. DAC participation is always a priority, but it is a bit of both. We're also looking to see if there are geo areas where we haven't seen any projects yet, and if we can do any application outreach there.
- **CBO Partner:** Regarding the training for CBOs and the TA lite report process, is there a way to include how the IRA tax and SOMAH incentives can stack? It's such a great tool for CBOs to use and can be leveraged to get more leads.
 - **SOMAH PA:** Yes, that is something we want to incorporate and stylize to make it more marketable.

Wrap-Up & Next Steps

Mina Defee, SOMAH Program Manager

The SOMAH PA shared a preview of a new video highlighting a completed SOMAH project at the Trolley Trestle Apartments in Chula Vista, CA. Mina announced the dates for each advisory group's Q1 2023 meetings and shared an end-of-year survey for AC and JTO TF members to provide additional feedback.