

Meeting Notes

Solar on Multifamily Affordable Housing (SOMAH) Advisory Council & JTO Task Force Meeting Q4 2024

December 13, 2024
Virtual Meeting

Attendees:

SOMAH Program Administrator Team

Minerva Defee | SOMAH Program Manager
Brittany Chenier | SOMAH Program Manager
Luke Ballweber | SOMAH Program Manager
Hannah Keenan | 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
Ashley Gerrity | SOMAH Program Manager

SOMAH Advisory Council

AJ Perkins | Instant ON
Alma Marquez | Independent Consultant
Andrea Barnier | Self-Help Enterprises
Andres Ramirez | People for Mobility Justice
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

SOMAH JTO Task Force

Hattie Wyatt | Young Community Developers
Jeff Trirogoff | Elements of Earth & Energy
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

SOMAH CBO Partners

Jose Gonzalez | Self-Help Enterprises

Karina Aguilar | Community Environmental Council

Not in attendance:

Nicole Lim | California Indian Museum & Cultural Center, Advisory Council

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

Janie Hodge | Paving the Way Foundation, JTO Task Force

Meeting Agenda

1. Welcome, Introductions & Meeting Overview
2. Session 1: SOMAH Program Update
3. Session 2: Limitations for Participation in Policy
4. Session 3: Setting the Structure for Working Groups in 2025
5. Thank You's & Celebrations
6. Wrap Up & Next Steps

Meeting Notes

Welcome & Introductions

Mina Defee, SOMAH Program Manager

Mina Defee welcomed Advisory Council (AC) and Job Training Organization (JTO) Task Force members to the meeting with a round of introductions and an overview of the meeting agenda.

Session 1: SOMAH Program Update

Stacey Lee, SOMAH Program Coordinator

Mina Defee, SOMAH Program Manager

Notes

Stacey announced that Ken Wells and Christian Cruz were elected by their fellow members as chair and vice chair (respectively) of the AC, and that Jon Caffery and Jeff Trirogoff were elected chair and vice chair of the JTO Task Force. As agreed in the Q3 meeting, the JTO Task

Force will be sunset at the end of 2024. Stacey acknowledged the four JTO Task Force members selected to continue as a part of the AC. The AC will move forward as a 15-member advisory body for the remainder of the 2024-25 term.

SOMAH PA is excited to announce the new Tribal members webpage (calsomah.org/tribes), which features information on tribal property eligibility requirements and highlights SOMAH success stories featuring tribal properties. Special thanks to our tribal AC members Elizabeth Elliott and Nicole Lim for their support and feedback on this effort.

The SOMAH PA is also happy to announce a new tenant testimonial video, highlighting a Santa Ana resident and how the SOMAH program has helped him save money on his monthly utility bill. The video can be viewed at the CalSOMAH.org Resource Library ([here](#)).

Mina capped off the session by providing background and a high-level summary of the directives given to the SOMAH PA and investor-owned utilities (IOUs) in the California Public Utilities Commission's (CPUC) Final Decision. A summary and notification email specifically about the immediate suspension of the Expected Performance Based Buydown (EPBB) calculator for NorCal projects will be coming out next week for those subscribed to the SOMAH listserv.

Discussion

AC Member: The tribal members webpage looks great. It would be great to add a banner on the main CalSOMAH webpage to update visitors that this resource is new and now available.

- **SOMAH PA:** Our marketing team is currently working on displaying a carousel of program stats on the main page. While adding a new and separate banner might be in conflict with that carousel, we can definitely link the Tribal webpage within it.

AC Member: I am concerned the tenant testimonial's mention of a negative utility bill can be misleading, as there is an initial period when tenants' utility bills undergo adjustments before the final average utility cost with SOMAH benefits will kick in. I suggest placing a disclaimer or footnote on the video that tenants' utility bills may not necessarily be negative or zero once the SOMAH installation is operating.

- **SOMAH PA:** Adding a disclaimer to the video description has been previously discussed among the SOMAH PA and we will explore adding it to the video as well as the webpage. We have also highlighted in our materials that this is merely one tenant's personal experience with SOMAH, and it could look different for each person.

AC Member: Integrated solar battery funding? Sharing workshop information when it is finalized

- **SOMAH PA:** It will be an addition to what we currently are offering, direction on

mirroring the SGIP program.

AC Member: Regarding the removal of the Tenant Education requirement, can we get assurance from property owners and contractors that they won't hinder these services? Will property owners still be informed that tenant education can be provided?

- **SOMAH PA:** Property owners will still be made aware of these tenant education services. SOMAH CBO partners will be re-contracted with tenant education in their scopes. Our Tenant Engagement Manager is developing additional TE services in the near future such as virtual modules.

AC Member: Representing property owners – we fully support tenant education, but often capacity is an issue. I think this could help bring in smaller property owners who were struggling to meet these requirements.

AC Member: Does this mean tenant education will be triggered by tenant request and not be done automatically at all properties?

- **SOMAH PA:** If helpful, here's an excerpt of what the decision language says on this: "... to reduce administrative costs and minimize contractor/applicant burden, we eliminate the tenant education requirements adopted in Resolution E-4987. The SOMAH PA should continue to make its extensive array of existing tenant education materials and resources available for (optional) download and/or distribution, and may update those materials as needed to reflect important changes in rules or regulations impacting tenants. Although tenant education may help tenants recognize the benefits of on-site solar, it is not a key driver for generating SOMAH applications and projects."

JTO TF Member: Tenant education and collaborating with CBOs to strategize on it is very important.

AC Member: What kind of CBO partnerships do we currently have? If we have a low budget, we can elevate them and support them with their limited budget.

AC Member: The Niles Foundation was contracted to focus on property owner and workforce development outreach, but we have noticed the trend that the demand for tenant education services have highly increased and we are willing to support the needs of the program as a CBO partner.

- **SOMAH PA:** We can have a discussion focused on our CBO partnerships in our Q1 meeting. Current CBO partner contracts have been extended through amendments, and we will have new contracts starting April 1, 2025.

AC Member: Do we have data on how many projects were delayed or stopped due to not meeting the tenant education requirement?

- **SOMAH PA:** There is no track record of whether projects have been delayed due to difficulty in fulfilling TE requirement, but no projects have ever been turned away or

disqualified, as long as the intent is still there. The PA works with them to support, such as bringing in our Tenant Engagement Manager to work with them.

AC Member: Are we looking for more CBO partners that work in specific languages? Like Spanish, Tagalog, etc.

- **SOMAH PA:** The PA is not actively looking for new CBO partners, but we are happy to talk to any that are recommended or interested. I will reiterate that budget is unfortunately still going to be a big constraint for us.

AC Member: Will the IOUs provide a direct contact for their staff members that are assigned to work on interconnection issues? What are the PA's requests for this representative? Can AC members sit in on those working group sessions?

- **SOMAH PA:** IOUs will be confirming those contacts publicly to showcase details on how they will address interconnection. There will be a direct email contact or phone number per IOU to work directly with our program. The PA will continue to work on sharing our expectations with the IOU group during ongoing working group meetings. The Energy Division has directed that these working sessions remain internal, but we as the PA can continuously share the updates on this process with the AC.

Session 2: Advisory Groups & SOMAH PA - Policy Do's & Don'ts

Mina Defee, SOMAH Program Manager

A review of guidelines regarding AC member advocacy is provided, with do's, don'ts and examples for each. AC members are reminded they may lobby or advocate elected officials for legislation in their own professional roles and as constituents, but not speaking as a representative of the SOMAH AC and never billing time to the SOMAH program or using AC meeting time to discuss such matters. Members are encouraged to connect with GRID's, CSE's or CHPC's policy specialists (working outside of the SOMAH program) for guidance and advice.

Session 3: Setting the Structure for Working Groups

Stacey Lee, SOMAH Program Coordinator

This working session is in response to high interest from multiple AC members in the Q2 2024 meeting to have working groups dedicated to different program topics in between quarterly meetings. Previous JTO Task Force and AC cohorts have had working groups in some shape or form. This was a space for advisory group members to brainstorm what working groups could look like for this AC cohort for the remainder of their term.

Advisory Council Breakout Discussion

Facilitator: Ken Wells, AC Chair

- Working group topic brainstorm:
 - Network leveraging, establishing relationships with local governments.
 - CBO partnership alignment, planning and best practices.
 - Energy storage.
 - Prioritizing underserved communities (i.e., DACs, native, Indigenous, desert, far north and Central Valley communities), emphasizing geographic diversity.
- The community and customer connections the AC members have and how they can leverage those for the program's benefit or to be directly involved are the most valuable things the PA relies on. This is slightly different for each AC member based on their expertise.
- Perhaps the PA could flow up more information and provide links to events or activities in different regions like success stories, ribbon cuttings and conferences.
- AC members would like to better understand CBO partnerships and how the PA is diving into affordable housing portfolios. How do we make it scalable?
- Working groups give AC members time to dive deeper into focused topics and allows the opportunity to gather thoughts to create the feedback necessary with the quarterly AC engagement.
- Value in the opportunity to bubble up solutions to pass along to the PA.
- Interconnection challenges create bottlenecks. Brainstorm and innovate on guidance within the structure from the CPUC and IOUs.
- Need to lean into the program being business friendly – if the developer isn't benefiting then it's difficult to succeed with a viable financial model.
- Flagging challenges with master metered property conversion – IOU contacts will be meaningful to bring in the big picture of interconnection.
- There should be a minimum of three members for a working group to be official.

JTO Task Force Breakout Discussion

Facilitator: Jon Caffery, JTO Task Force Chair

- Working group topic brainstorm:
 - Roofing (to determine if there needs to be a new roof).
 - Energy storage.
 - Workforce development.
 - Tenant education and how it can facilitate tenant job opportunities, especially with the TE requirement being removed.
 - Strategize around streamlining PA staff knowledge over program and application processes to support more efficient coordination with CBO partners regarding leads and applicants.
- Suggestion to include job training metrics in TE outreach.
- It would be great to see TE materials sent to tenants 2-3 months before installation begins so they have an opportunity to apply for those jobs.
- WFD working group discussion topics:
 - Could provide formal recommendations to the PA.
 - How far in advance tenants are delivered the information.
 - Number of tenants provided materials.
 - Number of jobs shared with tenants.
 - Number of resumes submitted by tenants.
 - Number of students trained.
 - Zero in on the timing and consistency of making tenants aware of job training opportunities; want them to be informed alongside the community.

Full Group Discussion

- Working group topics of interest:
 - Battery storage.
 - CBO partnerships & tenant education.
 - Tribal and rural property engagement.
- Most AC members are willing to participate in a working group.
- \$500 stipend is the maximum budget allotted for each AC member per quarter.
 - Working groups in the AC is a new development.
 - AC members will continue receiving the stipend if they attend quarterly AC meetings to align with the original level of commitment and compensation members signed up for at the beginning of their term.
 - Participation in working groups (separate from quarterly meetings) will be completely voluntary and based on individuals' capacity and interest.
 - Consensus that stipends will not be tied to working group attendance in any way.
- There won't be a specific number of working group meetings per quarter; they may

fluctuate.

- The length of working group meetings should be no more than an hour.
- Each working group should have at least three members to be most effective.
- Next steps:
 - Review discussion notes and share possible working group topics with the AC.
 - Identify working group session leaders who can then start scheduling.
 - Propose dates for when these working groups could start.

Wrap-up & Next Steps

Stacey Lee, SOMAH Program Coordinator

- Next steps for the SOMAH PA
 - Email with slide deck and post-meeting survey to be sent out early next week.
 - Q4 meeting stipends to be processed next week.
 - Coordinate action items from working group discussion.
- Proposed meeting dates (Fridays from 9:30 am to 12:30 pm)
 - Q1: March 21
 - Q2: June 20
 - Q3: September 19
 - Q4: December 12