

Q4 Public Forum

October 27, 2026

SOMAH

A Commitment to Equity

SOMAH is dedicated to equity through a community-based approach that amplifies the voices of those most burdened by social and environmental factors and ensures the program listens to and is responsive to the communities it serves. Through public forums, direct outreach and education, connections broaden into community partnerships that further develop SOMAH's inclusiveness and capacity to engage.

Energy and Environmental Justice are in SOMAH's DNA

Created largely by the advocacy efforts of environmental justice groups and funded by greenhouse gas auction revenues through California's Cap-and-Trade Program, SOMAH's work to expand clean energy access to low-income and environmental justice communities in particular has clear restorative and environmental justice implications.



Agenda Overview

1:00 - 1:10 | **Welcome & Introductions**

1:10 - 1:35 | **Session 1: Program Updates**

- Key program stats and updates
- Program resources and services
- Q&A/Discussion

1:35 - 2:10 | **Session 2: CPUC Final Decision**

- Summary of final decision D.26
- Next steps
- Q&A/Discussion

2:10 - 2:15 | **Break**

2:15 - 2:50 | **Session 3: Triennial Evaluation**

- Recap of evaluation process and findings
- Response to recommendations
- Q&A/Discussion

2:50 - 2:55 | **Looking Ahead & Next Steps**

Welcome & Introductions
Access & Follow-up

- Forum will be recorded; recording not be publicly available
- This slide deck will be emailed and posted to CalSOMAH.org next week
- Notes will be compiled and edited for release within ten (10) business days
- Additional questions and comments: contact@CalSOMAH.org or 858-244-1177, ext. 5



Welcome & Introductions

SOMAH Program Administration Team

Program Administration

Luke Ballweber | SOMAH Program Manager

Minerva Defee | SOMAH Program Manager

Victoria Leslie | SOMAH Program Manager

Joyce Tang | SOMAH Program Manager

Stacey Lee | SOMAH Program Coordinator

Alyssa Golinar | SOMAH Program Coordinator

Dema Tzamaras | SOMAH Program Coordinator

Technical Assistance

Sarah Hill | SOMAH Program Manager

Staci Rivas | SOMAH Program Manager

Matt Kroll | SOMAH Energy Project Manager

Luis Amar | SOMAH Technical Assistance Manager

Workforce Development & Tenant Education

Ashley Gerrity | SOMAH Workforce Development Manager

Nic Muñoz-Proulx | SOMAH Program Manager

Welcome & Introductions

SOMAH Program Administration Team

Marketing, Education & Outreach

Monica De La Cruz | SOMAH ME&O Manager

Poolak Forutanpour | SOMAH ME&O Manager

Alyssa Golinar | SOMAH ME&O Coordinator

Mariah Birnbaum | SOMAH ME&O Coordinator

Brittany Chenier | SOMAH ME&O Coordinator

Alessandra Gonzales | SOMAH CBO Outreach Manager

Blanca de la Cruz | Sustainable Housing Program Director, California Housing Partnership

Rachael Diaz | Senior Sustainable Housing Program Manager, California Housing Partnership

Jacqueline Rogge | Senior Sustainable Housing Program Associate, California Housing Partnership



Session 1:
Program Update

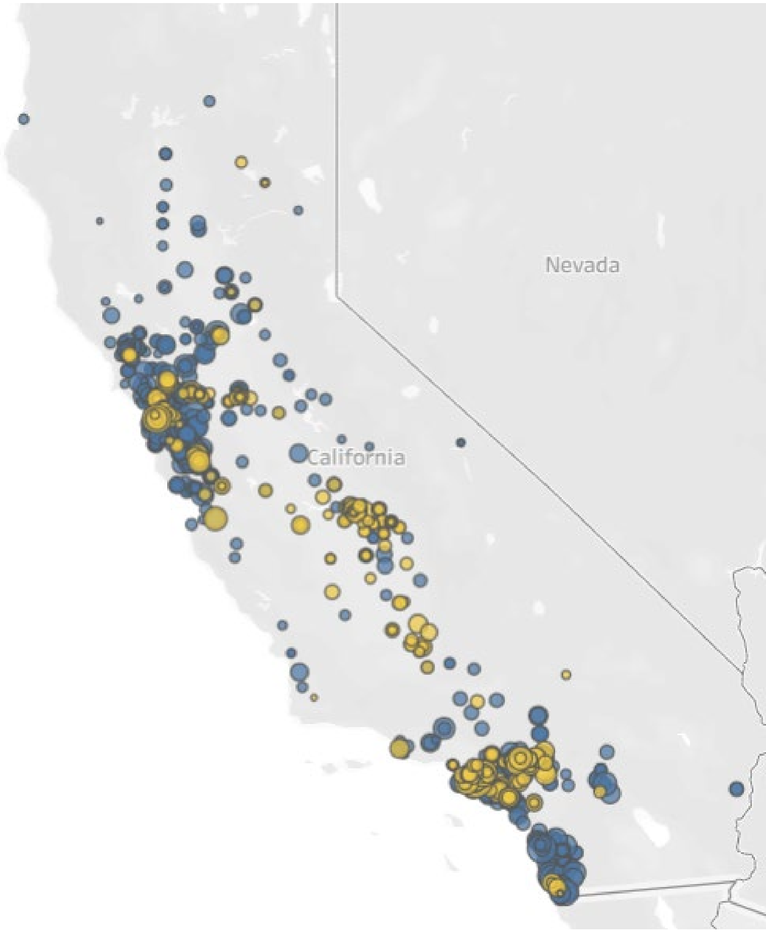
Monica de La Cruz
SOMAH Program Manager

SOMAH

Session 1: SOMAH Program Updates

Application Breakdown

Utility Territory	# of Applications August 2025	# of Applications October 2026	# of Applications with Integrated Storage October 2026
Pacific Gas & Electric	492	604	193
Southern California Edison	220	252	66
San Diego Gas & Electric	99	112	45
Pacific Power	0	0	0
Liberty Utilities	1	1	1
Total	**812**	**969**	**305**



Session 1: SOMAH Program Updates

Where We Are Today

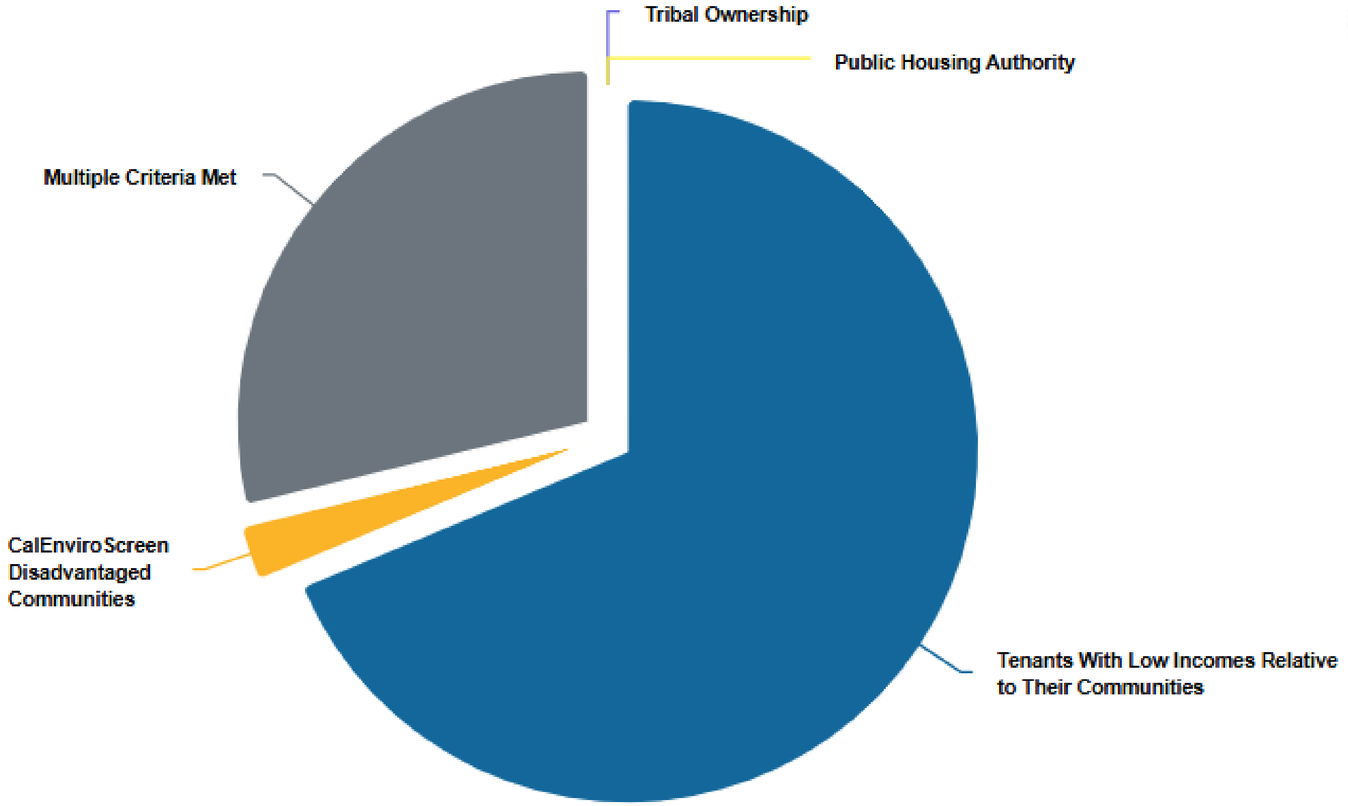
All territories are open to new applications with no waitlists

Utility Territory	Reserved Funding	Funds Already Paid
Pacific Gas & Electric	$78,788,036	$95,798,201
Southern California Edison	$37,558,008	$60,844,286
San Diego Gas & Electric	$16,429,399	$19,683,075
Pacific Power	$0	$0
Liberty Utilities	$156,839	$268,818

Session 1: SOMAH Program Updates

Where We Are Today

- **33%** of SOMAH's active applications are located in Disadvantaged Communities (DACs)*
- **0.4%** of SOMAH's active applications are located in Tribal Ownership
- Tenants are slated to receive **~83.03%** of the electricity generated from SOMAH installations



*DACs are defined as "the top 25% scoring areas from CalEnviroScreen along with other areas with high amounts of pollution and low populations" SB 535

Session 1: SOMAH Program Updates

Project Pipeline

- Serving **75,199** tenant units
- Average system size: **225** kW
- **17** participating contractors
  - **27** subcontractors reported
- Pipeline supports **1,740** job training opportunities
  - **125,920** current training hours
  - Averaging **$3.01M** in current wages
  - Leveraging **33** job training organization relationships



Session 1: SOMAH Program Updates

Additional Program Statistics

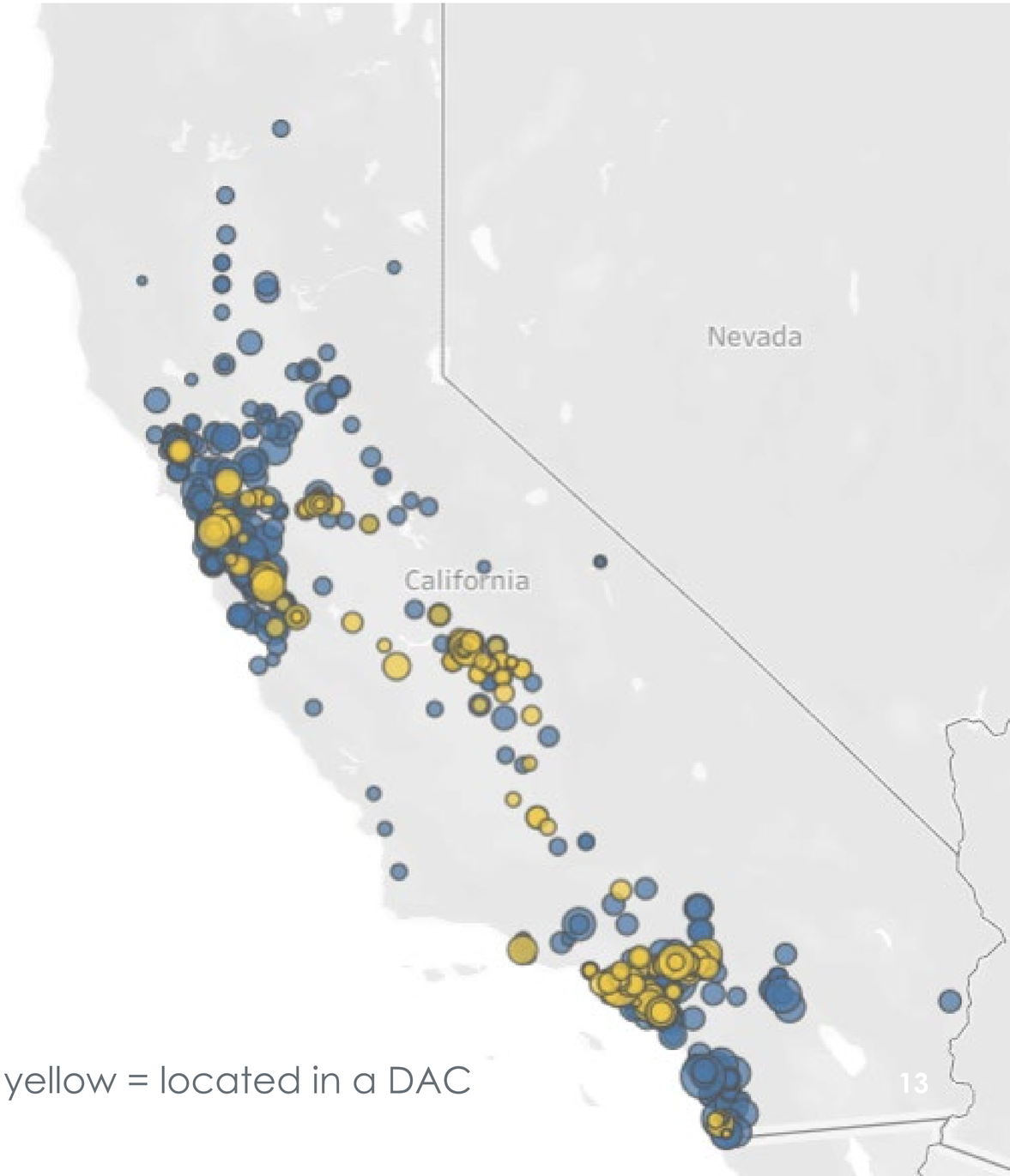
- Progress Payments
  - **140** progress payments approved **($41.8 M)**
  - **2** under review/pending
- Incentive Claims
  - **376** final incentive payments issued **($102.8 M)**
  - **19** close behind at inspection and final incentive claim IOU approval
  - **3** under review/upcoming
- Upcoming activity
  - 2026 Q4 ICF due dates: **33 projects**
  - 2027 Q1 ICF due dates: **63 projects**



Session 1: SOMAH Program Updates

Completed Projects

	August 2025	October 2026
Completed Projects	332	467
MW of Electricity	70.4	100.9
Tenant Units	23,397	33,065



yellow = located in a DAC

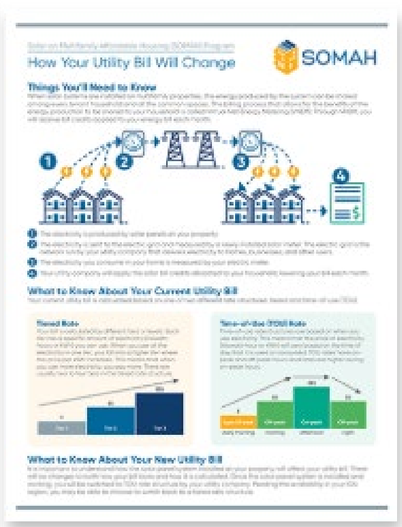
Session 1: Program Update

Tenant Education

- Final revamped TE materials were uploaded to the SOMAH website in early May
- Updated **TE FAQs** were uploaded to SOMAH website in early September

Tenant Education Toolkit

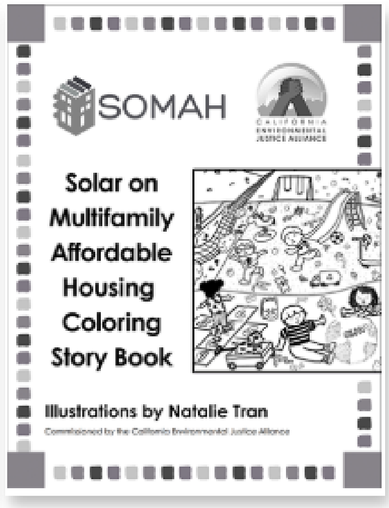












Session 1: Program Update

Workforce Development

- **Implemented change in frequency of employment and performance surveys**
  - **Previously:** Sent to contractors at the end of the project, and up to 3 follow-up surveys for up to 9 months to capture continued employment data.
  - **Now:** Only the initial and one follow-up survey at 6 months.
- **Expanded definition of "Targeted Hires"**
  - **Original definition** included, but not limited to:
    - DACs, affordable housing residents, women, POC
  - **Now includes** Adverse Childhood Experiences (ACEs)
    - Categorized into three main themes before the age of 18 (Abuse, Neglect, and Household Challenges)
    - More info can be found here: https://www.cdc.gov/aces/about/index.html

Session 1: Program Update

New Project Case Study



Rancho Vista Townhomes

- SOMAH contractor: BPi
- 125 units in Ontario, CA
- 521-kilowatt solar installation
- > 95% tenant allocation
- Received permission to operate (PTO) in September 2025
- Project did not use Investment Tax Credit (ITC) or Low-Income Housing Tax Credit (LIHTC)

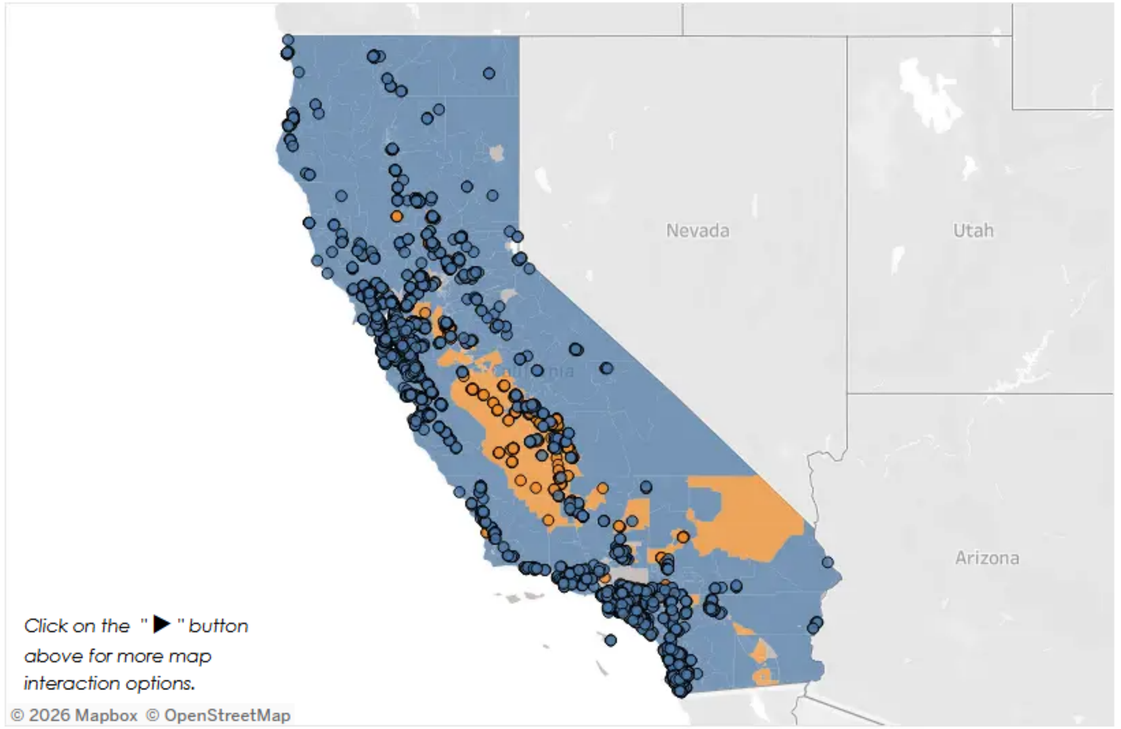


Visit: calsomah.org/resources/rancho-vista-celebrates-somah-solar-installation

Session 1: SOMAH Program Updates

SOMAH Resources - Eligible Properties Map

Property Locations by DAC Status



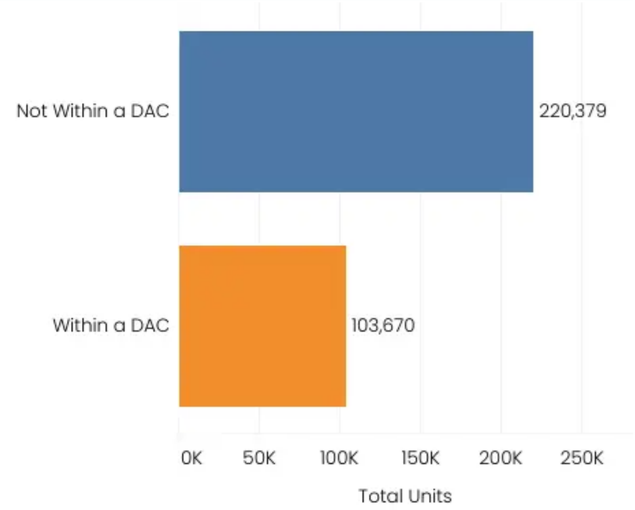
The **Property Locations by [1] Disadvantaged Community Status** map displays the location of properties likely eligible for the SOMAH Program. The color shows details about Disadvantaged Community (DAC) Census Tracts, which are defined based on CalEnviroScreen 4.0 criteria.

Eligible Property Summary

Total Properties: **4,252**

Active SOMAH Properties: **399 (9%)**
Completed SOMAH Properties: **426 (10%)**

Total Units by DAC Status



This chart shows the number of affordable housing units by disadvantaged community status.

Data on properties with active SOMAH applications updated as of 6/17/2026
Data on likely eligible properties updated as of 5/20/2026

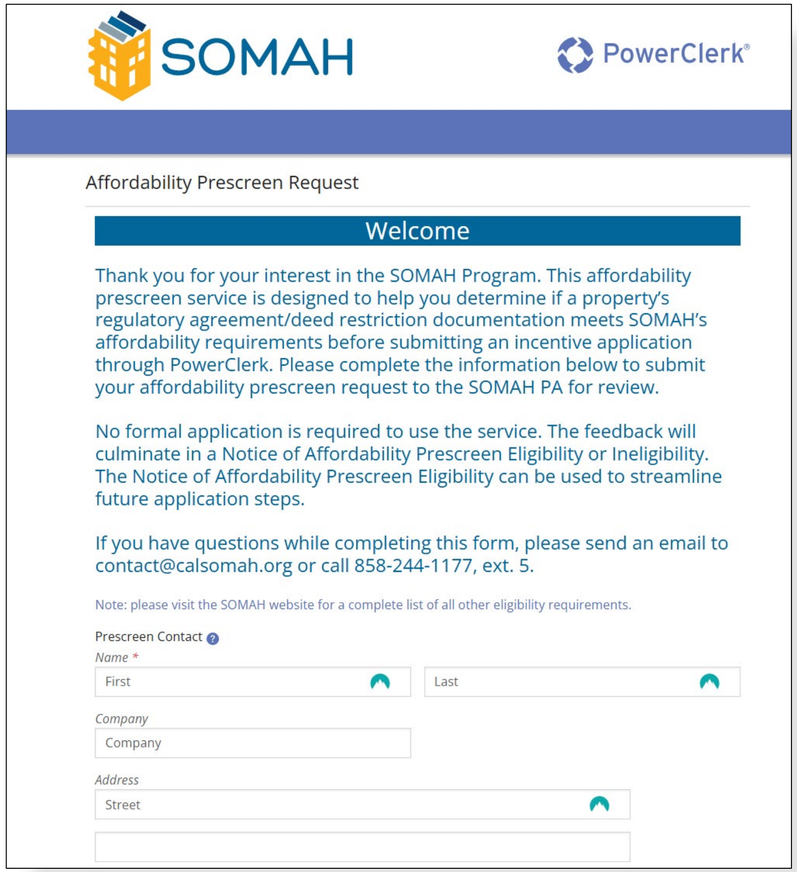
Visit: calsomah.org/eligible-somah-properties-map

Session 1: SOMAH Program Updates

SOMAH Resources - Affordability Prescreen

- Establishes eligibility status of a property's deed restriction/regulatory agreement documentation
- Allows SOMAH PA to provide input as early as possible on the most complicated piece of eligibility to assist with project feasibility planning
- Available to anyone - no program pre-qualifications needed for access!

Visit: https://calsomah.org/prescreen



Session 1: SOMAH Program Updates

SOMAH Resources - Storage

Current status of the incentivized paired storage offering:

- **PG&E:** Paused with waitlist
- **SDG&E:** Paused with waitlist
- **SCE:** Currently open for reservations
- **Liberty:** Currently open for reservations
- **Pacific Power:** Currently open for reservations

Please note: all territories are open for solar reservations



Integrated Storage Waitlist

SOMAH Storage Incentives Are Going Fast

To help achieve the SOMAH Program's goal of installing 300 MW of solar generating capacity across eligible service territories, the program has paused integrated battery storage incentives in:

- PG&E service territory, effective May 22, 2026
- SDG&E service territory, effective July 15, 2026

The SOMAH Program is developing a process that will allow applicants pursuing projects in PG&E and SDG&E service territories to register their interest in integrated battery storage should storage incentives become available again in the future.

Integrated battery storage incentives remain available for eligible projects in the following service territories:

- Southern California Edison (SCE)
- Liberty Utilities
- Pacific Power

If your project includes battery storage, apply as soon as possible to secure available storage incentives in these service territories.

Projects in PG&E and SDG&E service territories can still apply for solar PV incentives. Additional eligible costs, such as roof repairs, also remain available through the SOMAH Program.

Current Storage Waitlist

View the current integrated storage waitlist by service territory below or join the wait list.

Visit storage landing page for more info:

https://calsomah.org/resources/integrated-storage-waitlist

Session 1: SOMAH Program Updates

SOMAH Resources - Storage (cont.)

Additional Resources

Storage Waitlist Interest Form

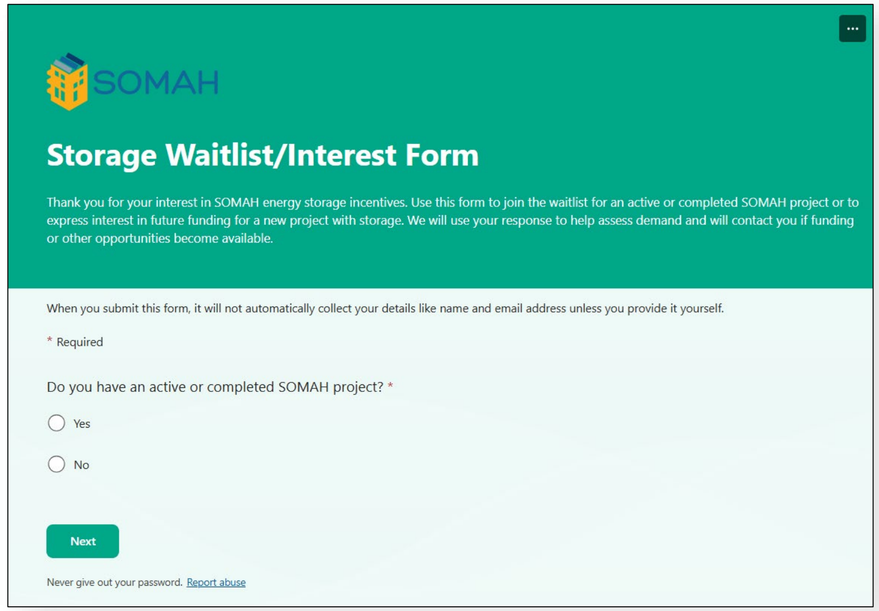
https://forms.cloud.microsoft/Pages/ResponsePage.aspx?id=vzfWOaEtNEexREijNAlcMig0lOpEBUtPtsmOv-a0mVlUNUlxSkpBMUo1QThRRDNURzhKOEhGUENUNC4u

Storage in the Program Handbook (Section 2.4)

https://calsomah.org/resources/program-handbook#Group2Sub4

SOMAH Frequently Asked Questions

https://calsomah.org/faq



Session 1: SOMAH Program Updates

SOMAH Resources - Suite of TA & Support Services



Technical Assistance and Support Services help you navigate the program and provide:

- Equal access to SOMAH benefits
- Education and access to resources
- Overcome challenging barriers
- No-cost program, technical and financial support

To request TA, visit: CalSOMAH.org/TA-Request

Session 1: SOMAH Program Updates

TA & Support Services: Tenant Education

Free tenant education support services to help projects reach their tenant education requirements (in-person & virtual):

- Workshops for tenants
- "Train the Trainer"
- Tenant Education 101 meeting

As a reminder, the requirement is only applicable to applications submitted **before July, 1, 2025**. However, services are available to any SOMAH project that has received Proof of Project Milestone approval.

Apply now at: bit.ly/SOMAH-TE-Services

or contact:
tenants@calsomah.org



Session 1: SOMAH Program Updates

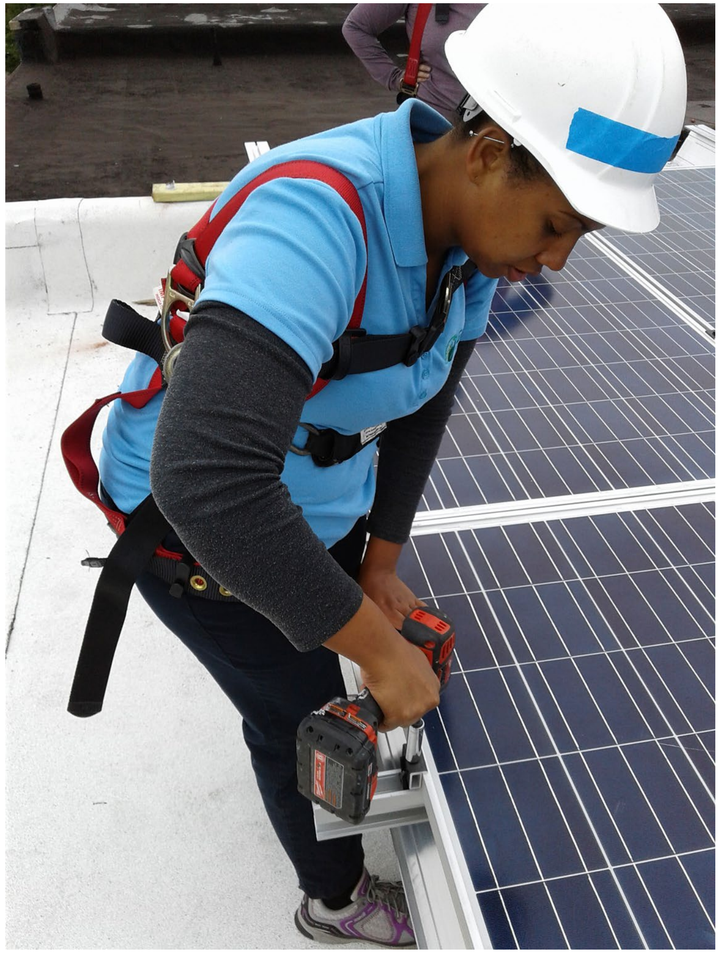
TA & Support Services: Job Training

We support contractors in meeting SOMAH's job training requirements, and trainees in getting connected to solar training opportunities.

What we provide:

- Recruitment and placement support
- Job training portal guidance
- Connection to local job training organizations
- Education and development

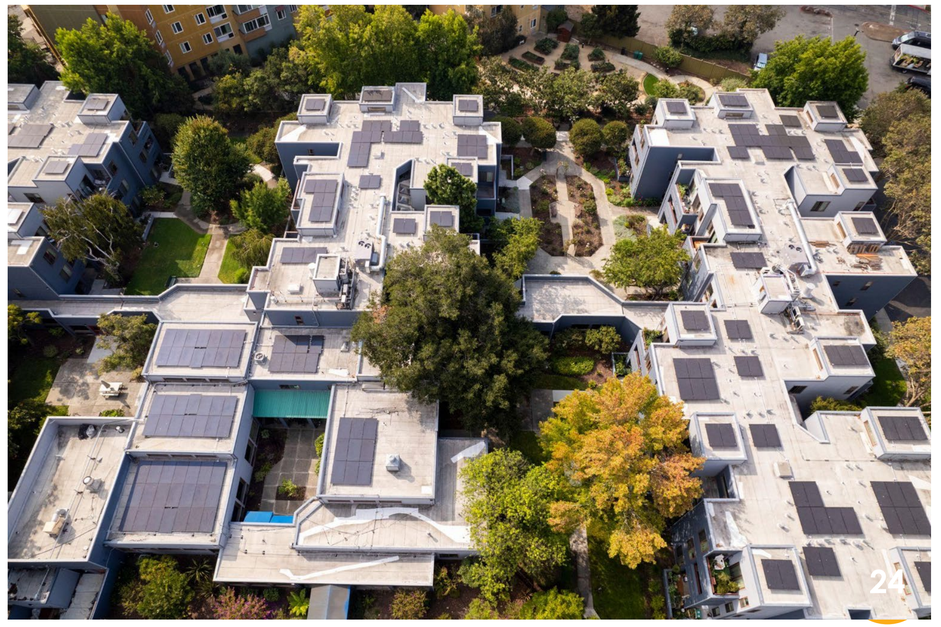
Contact: workforce@calsomah.org



Session 1: SOMAH Program Updates

Celebrating Completed Projects





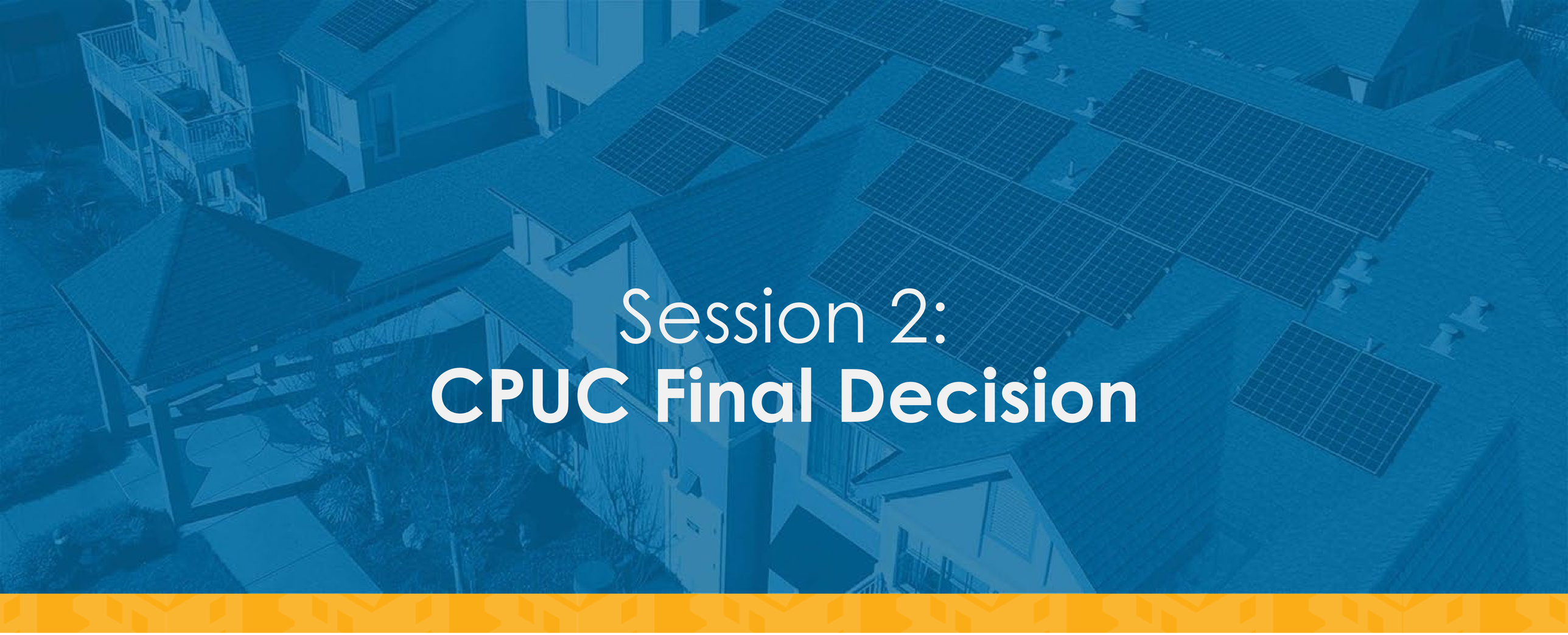
We want to celebrate solar!

As more projects are completed, the SOMAH PA wants to help you celebrate with a ribbon-cutting ceremony or other event to:

- Highlight bringing solar to your community
- Raise awareness about SOMAH

We can help with planning and promotion!

Contact: media@calsomah.org



Session 2:
CPUC Final Decision

Alyssa Golinar
SOMAH Program Coordinator

SOMAH

Session 2: CPUC Final Decision

SOMAH Proceeding - Track 1

Rulemaking 25-01-005

- Released on July 13, 2026
- Declined to expand SOMAH incentives for master-metered properties and new construction
- Liberty & Pacific Power can return a portion of SOMAH funds to their customers via Climate Credits
- Unused SOMAH funds should be returned to the IOUs' GHG revenue accounts
- SOMAH PA may request to extend its SOMAH administrative spending beyond 2032 exclusively for program close-out tasks
- Accrued interest for SOMAH funds should be returned to the IOUs' GHG revenue account
- Full text can be found on **www.cpuc.ca.gov**

Session 2: CPUC Final Decision

SOMAH Proceeding (R. 25-01-005)

~~Track 1~~	~~Tentative Timeline~~
~~Ruling Requesting Comments~~	~~Q2 2025~~
~~Proposed Decision~~	~~5/28/2026~~
~~Final Decision~~	~~7/13/20~~

Not expected to include SOMAH in any future rulemakings from this docket

Track 2, 3, 4, 5	Tentative Timeline
Ruling Requesting Comments on 3 & 5	2026
Begin consideration of 2, 4, and 5	2026
Proposed Decision(s)	TBD
Final Decision(s)	No earlier than 30 days after the Proposed Decision has been issued

BREAK (5 min)





Session 3:
Triennial Evaluation

Mina Defee
SOMAH Program Manager

SOMAH

Session 3: Triennial Evaluation

Background

- SOMAH is required to undergo a third party evaluation every three years.
  - Final draft of SOMAH's third evaluation is now available.
- Provides an update on SOMAH's progress towards meeting its goals
- Provides an assessment of the program's impacts, cost effectiveness, and progress made on recommendations from last evaluation

Session 3: Triennial Evaluation

Findings & Recommendations

Key Report's Findings and Recommendations:

- Program Performance
- Program Participation & Eligibility
- Project Cancellations, Future Participation
- Project Cost
- Application Processing
- Program Tracking Data
- Property Owners
- Contractor
- Tenants
- Job Trainees
- CBO's
- Financial Organizations

Session 3: Triennial Evaluation

Findings & Recommendations

Key:

☑ Accept

☑ Accept with Conditions

✕ Reject

✣ Other

Session 3: Triennial Evaluation

Findings & Recommendations

Program Performance:

- Application volume has increased each year since 2022
- Pacific Power and Liberty Utilities participation remains low
- Current administrative setup is fragmented with disparate ownership of outreach outcomes.
  - ☑ **Rec:** Define outreach outcomes for each SOMAH PA organization that can serve as metrics by which their performance is evaluated
- Ongoing system performance issues were identified in over 150 projects
  - ✤ **Rec:** Continue exploring underlying reasons for consistently underperforming systems.
  - ✤ **Rec:** Identify effective strategies (possibly incentive-based or enforcement-oriented) that promote timely system repairs and sustained expected performance levels
  - ✤ **Rec:** Explore providing additional incentives for extended monitoring and maintenance contracts beyond 2032.

Session 3: Triennial Evaluation

Findings & Recommendations

Program Participation & Eligibility

- 32% of all projects are in a DAC, falling short of 40% goal
- TPO systems are still the dominant system purchase type
- Cross program participation is low for IOU administered stackable and EE programs.

  ☑ **Rec:** Track non-IOU stackable program participation (when possible)

- More recent versions of PVWatts have been shown to have higher generation estimates by approximately 10%, meaning SOMAH performance expectations are understated for projects using the EPBB method

  ☑ **Rec:** Research changing incentive calculations away from EPBB calculator for all SOMAH projects.

Session 3: Triennial Evaluation

Findings & Recommendations

Project Cancellations, Future Participation:

- Program ineligibility continues to be a top cancellation driver despite the addition of the affordability pre-screen service

  ✤ **Rec:** Categorize why "program ineligible" cancellations are occurring and determine what additional actions can be taken to reduce these cancellations

- Ten projects were cancelled because of Fannie Mae issues and three were cancelled because of HUD delays.

  ☑ **Rec:** Identify Fannie Mae funded projects early in the application process and alert property owners of potential issues and guide towards other funding solutions.

  ☑ **Rec:** Identify what is causing HUD document delays

Session 3: Triennial Evaluation

Findings & Recommendations

Project Cost:

- 84% of completed projects and 90% of active projects are leveraging the ITC. Only 1% of completed and 1% of active projects plan to use LIHTC

  ✕ **Rec:** Verify the ITC amount claimed by projects leveraging the ITC

- Contractors report prevailing wage requirements increase labor costs (when required)

  ☑ **Rec:** Explore the impact of prevailing wage requirements on overall project costs

Session 3: Triennial Evaluation

Findings & Recommendations

Application Processing:

- Project interconnection timelines are long and burdensome to contractors and property owners

  ✕ **Rec:** Create an escalation process where the SOMAH PA can flag long PTO delays to the IOUs who will investigate and expedite processing

- The timeline from interconnection to bill credits is improving
- 21% of the active projects submitted since storage incentives were made available are planning to pair storage with their solar

Program Tracking Data:

- Program tracking data continues to improve.

  ☑ **Rec:** Continue to improve tracking data with additional fields

Session 3: Triennial Evaluation

Findings & Recommendations

Property Owners:

- SOMAH Program awareness continues to be driven by contractor outreach
- Outdated SOMAH-eligible contractor lists have been shared with property owners, and the online SOMAH-eligible contractor directory does not accurately reflect contractor service areas.
  - ☑ **Rec:** Review and update the eligible contractor list on a regular basis to ensure that all contact information is up to date and that all businesses are operating
  - ☑ **Rec:** Update the SOMAH-eligible contractor directory to reflect contractor service areas.
- One property owner reported transformative savings by successfully stacking multiple programs; this is the exception but should be the norm
  - ✤ **Rec:** Conduct meetings with property owners about stackable programs after the energy efficiency compliance milestone whole-building audit so that the SOMAH PA (AEA) can help property owners decide on additional site upgrades

Session 3: Triennial Evaluation

Findings & Recommendations

Property Owners (Cont.):

- Property owners who had experience with the SOMAH PA's technical assistance services reported being very pleased with it
- Property owners don't have access to their own system's performance data (for TPO)
  - ✣ **Rec:** Share monthly performance reports from fleet-wide monitoring with property owners
- HCO property owners report having no maintenance plans and being unprepared for the cost
  - ☑ **Rec:** Include information about and a cost breakdown of cleaning and maintenance fees for HCO systems
- Property owner engagement receives 9% of the ME&O budget
  - ☑ Rec: Increase investment in property owner engagement

Session 3: Triennial Evaluation

Findings & Recommendations

Contractors:

- Non-participating contractors aren't getting onboarded effectively
  - ✤ **Rec:** Offer additional contractor eligibility training sessions and continue office hours topics related to how to secure leads and find eligible projects
- Contractors receive little support from the SOMAH PA in generating leads
  - ☑ **Rec:** Update the public facing eligible properties map with additional helpful information
- Contractor engagement and training together receive only ~5% of the ME&O budget
  - ☑ **Rec:** Increase investment in contractor support and engagement
- Some tribal properties can't qualify under current deed restriction documentation requirements
  - ☑ **Rec:** Continue to pursue alternative documentation pathways for Tribal properties to demonstrate they serve low-income tenants

Session 3: Triennial Evaluation

Findings & Recommendations

Tenants:

- Tenants most often learned about SOMAH passively by seeing the panels (48%) or hearing from property managers (42%)

  ☑ **Rec:** Ensure property managers are aware of and have access to accurate program information and effective communication materials to improve tenant experience

- More than one-third of tenants were unaware that they would (or do) receive solar credits on their electricity bills prior to taking the survey

  ☑ **Rec:** Deliver clear, utility-specific bill credits customized to SOMAH tenants when credits begin

Job Trainees:

- 80% of trainees are satisfied with the job training, they are mostly referred by JTOs, and are mostly hired on a short term basis

Session 3: Triennial Evaluation

Findings & Recommendations

CBOs:

- CBO KPIs are activity-based and do not measure whether outreach actually generates applications.

✤ **Rec:** Refine CBO KPIs to include outcome-based metrics

☑ **Rec:** Reassess the level of CBO investment

Financial Organizations:

- Financing partner organizations are not being engaged or integrated into the program

☑ **Rec:** Increase education and marketing to contractors and property owners about existing financial organization partnerships and the available financing products

- Contractors don't know how to connect customers with financing options

☑ **Rec:** Develop more streamlined financing pathways that contractors can offer property owners

Session 3: Triennial Evaluation

Findings & Recommendations

Environmental Impacts:

- Emission reductions: **4,367 metric tons** of CO2 in 2023, **8,054 metric tons** of CO2 in 2024, and **14,219 metric tons** of CO2 in 2025.
- Forecasted emissions reductions: **16,116 metric tons** of CO2 per year (completed projects) and **39,548 metric tons** of CO2 per year (completed and active projects).

Economic Impacts (July 2024 – June 2025):

- Common area bill impacts: **68% saved** on average monthly bill
- Tenant bill impacts: **$58 per month**, or **79% saved** on average monthly bill
- CARE Tenant bill impacts: **$42 per month**, or **78% saved** on average monthly bill

Looking Ahead & Next Steps



Looking Ahead & Next Steps

Share Your SOMAH Experience

Encourage others to get involved!

We're looking for:

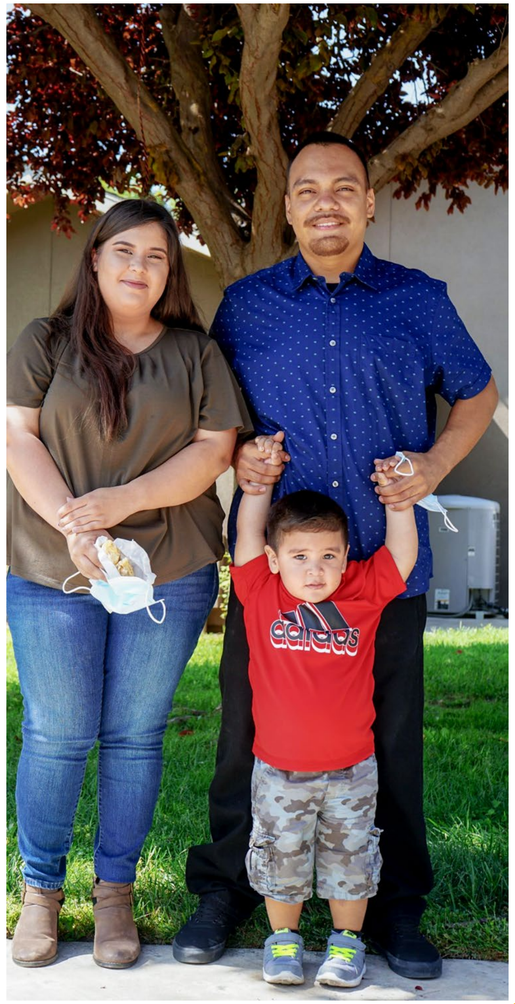
- Participants to interview
- Photos from projects
- Stories to tell

Interested in being featured?

Contact: contact@CalSOMAH.org







Looking Ahead & Next Steps

Follow Us!

For the latest news and updates about the program:

- Subscribe to our newsletter: **calsomah.org/email-sign**
- Follow/like us at @CalSOMAH on
  - **Facebook** | facebook.com/CalSOMAH
  - **Instagram** | @CalSOMAH
  - **YouTube** | SOMAH
  - **LinkedIn** | linkedin.com/company/calsomah



Looking Ahead & Next Steps

Upcoming Events

October 28, 11:30 AM PST | Wasco, CA

SOMAH Lunch & Learn Workshop at Villa Hermosa

November 5, 10:00 AM PST | Virtual/Online

Contractor Office Hours: Storage Incentives, Leads & Bidding

November 5, 11:30 AM PST | Oildale, CA

SOMAH Lunch & Learn Workshop at North Park

November 19, 10:00 AM PST | Virtual/Online

Solar Career Opportunities Q&A



Register at calsomah.org/events

Looking Ahead & Next Steps

What's Next?

- Forum will be recorded, recording not publicly available
- This slide deck will be emailed and posted to CalSOMAH.org next week
- Notes will be compiled and edited for release within ten (10) business days



Questions or Feedback?

Email: **contact@CalSOMAH.org**

Web form: **CalSOMAH.org/contact-us**

General hotline: **858-244-1177 ext. 5**

Tenant hotline: **800-843-9728**







Thank You!