Session 1: Welcome & Introductions
Sarah Hill
Session 1: Welcome & Introductions

Purpose

● Share program progress and updates
● Provide space for attendees to ask questions, share concerns and provide feedback
● Occur quarterly and rotate locations throughout California
<table>
<thead>
<tr>
<th>Time</th>
<th>Session Description</th>
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</thead>
<tbody>
<tr>
<td>1:00 - 1:10</td>
<td>Session 1: Welcome &amp; Introductions</td>
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<tr>
<td>1:10 - 1:20</td>
<td>Session 2: Application Stats &amp; Funding Update</td>
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<tr>
<td>1:20 - 1:50</td>
<td>Session 3: COVID-19 Response &amp; Listening Session</td>
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<td>1:50 - 2:00</td>
<td>Break</td>
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<tr>
<td>2:00 - 3:20</td>
<td>Session 4: A Preview of Proposed Handbook Changes</td>
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<tr>
<td>3:20 - 3:30</td>
<td>Session 5: Wrap-Up and Next Steps</td>
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Session 1: Welcome & Introductions
Meeting Guidelines

● Q&A will follow for each session
● Verbal comments and questions
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Session 1: Welcome & Introductions

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- This slide deck will be emailed and posted to CalSOMAH.org this week (by 3/21)
- Notes will be compiled and edited for release within five (5) business days (by 3/26)
- Additional questions and comments: contact@CalSOMAH.org (858-244-1177, ext. 5)
Session 1: Welcome & Introductions
SOMAH Program Administrator Team

Program Administration

Jae Berg | SOMAH Program Manager
Chris Walker | SOMAH Program Manager
Hannah Warner | SOMAH Program Manager
Alexandra Patey | SOMAH Program Manager
Marisa Villarreal | SOMAH Program Manager
Luke Ballweber | SOMAH Program Coordinator
Laura Wong | SOMAH Program Coordinator
David Lee-Burleigh | SOMAH Program Coordinator

Technical Assistance

Nick Dirr | SOMAH Program Manager
Sarah Hill | SOMAH Program Manager
Luis Amar | SOMAH Technical Assistance Analyst
Zara Jamshed | SOMAH Technical Assistance Coordinator

Workforce Development

Staci Hoell | SOMAH Workforce Development Manager
Pooja Ravindran | SOMAH Workforce Development Manager
Session 1: Welcome & Introductions
SOMAH Program Administrator Team

Marketing, Education & Outreach

Vallerie Gonzalez | SOMAH ME&O Manager
Kajsa Hendrickson | SOMAH ME&O Manager
Sarah Salem | Tenant Services & CBO Manager
Rachael Diaz | SOMAH ME&O Coordinator
Karinna Gonzalez | SOMAH ME&O Coordinator
Margee McDonnell | SOMAH ME&O Coordinator

Blanca de la Cruz | Sustainable Housing Program Director, CA Housing Partnership
Srinidhi Sampath Kumar | Sustainable Housing Program Manager, CA Housing Partnership
Michael Claproth | Sustainable Housing Program Associate, California Housing Partnership
Session 2: Application Stats & Funding Update
Hannah Warner
Session 2: Application Stats & Funding Update

Program Summary

• Provide financial incentives to install 300 MW of solar PV on affordable housing in California

• $100 million annual budget allocated by investor-owned utilities (IOUs) from shared greenhouse gas (GHG) action proceeds

• Participating IOUs: Pacific Gas & Electric, Southern California Edison, San Diego Gas & Electric, PacifiCorp, and Liberty
Focus on economic benefits for tenants
- At least 51% of the energy produced by the PV system must be allocated to tenants

Community-based approach
- Contracted with 4 Community Based Organizations

Technical assistance (TA)
- Provide TA to property owners and contractors at no cost

Energy efficiency (EE)
- Encourage EE by capping the incentive

Workforce development
- Encourage local and target hiring
### Current Application Statistics

<table>
<thead>
<tr>
<th>Utility Territory</th>
<th># of Active Applications</th>
<th># of Waitlist Applications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pacific Gas &amp; Electric</td>
<td>74</td>
<td>63</td>
</tr>
<tr>
<td>Southern California Edison</td>
<td>109</td>
<td>0</td>
</tr>
<tr>
<td>San Diego Gas &amp; Electric</td>
<td>28</td>
<td>20</td>
</tr>
<tr>
<td>PacifiCorp</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Liberty Utilities</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>213</strong></td>
<td><strong>83</strong></td>
</tr>
</tbody>
</table>
Session 2: Application Stats & Funding Update

Current Application Statistics

- **213** active applications
  - With nearly 19,000 tenant units
- **83** applications on the waitlist
  - With nearly 6,000 tenant units
- **9** participating contractors
  - With 106 registered eligible contracting companies
- **Average system size of 265.5 kW**
  - MASH comparison - average size 77 kW
- **2** active Track A applications
  - 1 approved, 1 waitlisted
  - Applications that opt-in to technical assistance
22% of SOMAH’s active applications are located DACs.

Tenants are slated to receive approximately 90% of the electricity generated from SOMAH installations.
## Session 2: Application Stats & Funding Update

### Current Waitlist

- Dedicated webpage - CalSOMAH.org/waitlist
  - Funding information
  - Status and estimated wait times
  - Waitlist updated weekly

<table>
<thead>
<tr>
<th>Utility</th>
<th>Status</th>
<th>Estimated Wait</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liberty Utilities Company</td>
<td>Open to applications</td>
<td>none</td>
</tr>
<tr>
<td>PacifiCorp</td>
<td>Open to applications</td>
<td>none</td>
</tr>
<tr>
<td>PG&amp;E</td>
<td>Open to waitlist</td>
<td>$41M in new funding expected in early April</td>
</tr>
<tr>
<td>SCE</td>
<td>Open to applications</td>
<td>none</td>
</tr>
<tr>
<td>SDG&amp;E</td>
<td>Closed to new applications</td>
<td>~1 year</td>
</tr>
<tr>
<td>Utility</td>
<td>Total New Funding</td>
<td>Estimated Remaining Accounting for Waitlist</td>
</tr>
<tr>
<td>--------------</td>
<td>------------------------------</td>
<td>-----------------------------------------------------</td>
</tr>
<tr>
<td>Liberty Utilities</td>
<td>TBA - ECAC</td>
<td>Funds available today</td>
</tr>
<tr>
<td>PacifiCorp</td>
<td>TBA - ECAC</td>
<td>Funds available today</td>
</tr>
<tr>
<td>PG&amp;E</td>
<td>~$41million (Upcoming)</td>
<td>$0</td>
</tr>
<tr>
<td>SCE</td>
<td>$65,953,481</td>
<td>$0</td>
</tr>
<tr>
<td>SDG&amp;E</td>
<td>$16,400,559</td>
<td>-$10 million (still waitlisted)</td>
</tr>
</tbody>
</table>
Session 2: Application Stats & Funding Update
Listening Session

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- **Verbal** comments and questions
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Session 3: SOMAH COVID-19 Response & Listening Session
Hannah Warner & Sarah Hill
Session 3: SOMAH and COVID-19 Response

PA Response

- Put health and safety first; heed COVID-19 public health guidance
- Low-income and disadvantaged communities are inherently more vulnerable
- The SOMAH PA team is active but fully remote; no in-person meetings, workshops, or events
- SOMAH PA is developing appropriate accommodations for program requirements as necessary
- All requirements need to be met for SOMAH incentive payment
Reservation request

- Property owners or their agent may have more limited availability to provide required docs or signatures.
- Contractors may have more limited access to job sites to troubleshoot meter information or address issues for data requests.
Energy efficiency compliance milestone

- Energy auditors may have limitations or restrictions on onsite and in-unit energy audits
- Property owner may have more limited availability for document signatures
- SOMAH PA has temporarily put all energy efficiency site-verifications on hold
Session 3: SOMAH and COVID-19 Response

Participant Planning

Tenant education

- Email and postal delivery of required materials is encouraged at this time
- Low-income communities and DACs are inherently more vulnerable to public health crises
  - Cancel any in-person tenant workshops
  - Exercise caution and mind social distancing guidelines if distributing flyers
- Tenants@CalSOMAH.org
Construction timelines and job training requirements

- Construction, social distancing, and restrictions on non-essential activities in regions under shelter-in-place guidelines
- Permitting, inspection, and interconnection
- Job training organizations and trainees
- COVID-19 barriers? Email us at workforce@CalSOMAH.org
Session 3: SOMAH and COVID-19 Response
Participant Planning

Listening session

● What measures is your company/org taking to ensure the health and safety of staff and stakeholders/clients?

● How is COVID-19 affecting your SOMAH-related activities or business operations?

● What type of construction timelines and potential delays do you anticipate?

● What can the SOMAH PA help to ensure your project’s success in light of COVID-19?
Session 3: SOMAH and COVID-19 Response
Listening Session

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Break

Reconvene at 2:00pm
Session 4: Preview of Proposed Handbook Changes
Chris Walker & Sarah Hill
Session 4: Proposed Handbook Changes

SOMAH Handbook Overview

1. Program overview
2. Eligibility and requirements
3. Incentive structure
4. Application process
5. Equipment certifications and design factor calculations
6. Appendices
Session 4: Proposed Handbook Changes

Why Change the Handbook?

- To better achieve stated goals and objectives
- To clarify or provide greater specificity around offerings and requirements
- To apply lessons learned from program implementation
- To respond to stakeholder feedback
Session 4: Proposed Handbook Changes

Types of Proposed Changes

• **Substantive**: A new process or requirement
  
• **Minor**: Additional details around or changes to an existing process or requirement
  
• **For future consideration**: Upcoming change to a process or requirement, pending a decision in progress or additional stakeholder feedback
Substantive

- Application pipeline management
- Required notification for early trainee termination
- System changes affecting incentive amounts
Session 4: Proposed Handbook Changes
Application Pipeline Management

• **What:** Replacement of blanket first-come, first-served approach with a lottery triggered by high volume

• **How:** New Handbook subsection providing the PA flexibility to change approaches to pipeline management - considering stakeholders feedback - with CalSOMAH.org as the main place of record

• **Why:** To level the playing field and provide greater flexibility for future changes to prioritization

• **When:** In force for SOMAH’s 2021 (3rd) budget cycle
Pace-dependent lottery: Scenario A

Lottery is triggered

1. Announce waitlist opening 30 days prior to opening
2. PowerClerk opens for 2-week period
3. Lottery is triggered
4. PowerClerk is closed to new applications; application/sorting process is completed

Lottery is triggered when applications exceed 120% of the annual budget. Lottery only includes Track B apps. Track A are first come-first serve; then Track A and Track B are sorted every other one on the waitlist.
Pace-dependent lottery: Scenario A

Lottery is triggered, cont.

1. Project order is announced and posted on the website
2. PowerClerk opens back up for Track A applications
3. Track A budget threshold is met
4. PowerClerk is closed for Track A applications

- Track B remains closed until next funding period
- Track A budget threshold is equal to 200% of the annual budget
Session 4: Proposed Handbook Changes
Application Pipeline Management

Pace-dependent lottery: Scenario B

Lottery is not triggered

1. Announce waitlist opening 30 days prior to opening
2. PowerClerk opens for 2-week period
3. Lottery is not triggered
4. Public announcement that waitlist is still open on website and email blast

Lottery is triggered when applications exceed 120% of the annual budget
Pace-dependent lottery: Scenario B

Lottery is not triggered, cont.

Applications are processed first come first serve in the order they were submitted.

Track B budget threshold is met; PowerClerk is closed for Track B applications.

Track A budget threshold is met; PowerClerk is closed for Track A applications.

PowerClerk is closed until the next funding cycle.

Track A and Track B treated equally.

Track B budget threshold is equal to 120% of the annual budget.

Track A budget threshold is equal to 200% of the annual budget.
Substantive

- Application pipeline management
- **Required notification for early trainee termination**
- System changes affecting incentive amounts
Required Notification for Early Trainee Termination

- **What**: Contractor must notify PA within 5 days of an early termination affecting compliance with job training requirement
- **How**: Email workforce@calsomah.org within 5 days
- **Why**: To ensure contractors make good faith efforts to meet job training requirements regardless of early trainee terminations
- **When**: PA will provide guidance within 5 days
Substantive

• Application pipeline management
• Required notification for early trainee termination
• System changes affecting incentive amounts
Session 4: Proposed Handbook Changes
System Changes Affecting Incentive Amounts

• **Why:** To allow post-solar sizing tool system size increases for approved load additions

• **What:** PA will pay additional incentive for larger systems under specific circumstance

• **How:** Pending approval of additional load justification; budget allowing and at current incentive level

• **When:** Additional load justification due at Proof of Project Milestone
Survey of Key Proposed Changes

Minor

• **Annual incentive reduction process**
• No reservation transfers
• Wage requirement (contractor vs. subcontractor)
• Required job posting timeline
• Pathway 2: Look back
• Electronic incentive payments
• Grounds for SOMAH incentive payment clawback
Session 4: Proposed Handbook Changes
Annual Incentive Reduction Process

• **What**: Specification of LBNL “Tracking the Sun” report series
• **How**: Lower of 5%/year or informed by rate of decrease in LBNL report
• **Why**: Provide greater detail on incentive reduction calculations
• **When**: Annually on July 1
Session 4: Proposed Handbook Changes
Survey of Key Proposed Changes

Minor

- Annual incentive reduction process
- **No reservation transfers**
- Wage requirement (contractor vs. subcontractor)
- Required job posting timeline
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Session 4: Proposed Handbook Changes

No Reservation Transfers

- **What**: The applicant cannot change the project site address on the application
- **How**: Withdraw the application listing the incorrect address; submit a new one
- **Why**: The project site address is a fundamental aspect of the reservation application
- **When**: In force as soon as new Handbook is approved
Session 4: Proposed Handbook Changes
Survey of Key Proposed Changes

Minor

- Annual incentive reduction process
- No reservation transfers
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Session 4: Proposed Handbook Changes

Wage Requirements for Projects with Subcontractors

• **What:** Wage floor requirement pertains to contractor’s (rather than subcontractor’s) entry-level wages

• **How:** Trainee wage must be $1.4 \times $\text{local\ min}$ or contractor’s entry-level wage - *whichever is higher*

• **Why:** Contractor rather than subcontractor is the primary project applicant; is responsible for job training requirement

• **When:** Will be entered on Job Training Portal (60 days prior to start of install) and reported on the Job Training Affidavit (Incentive Claim Package)
Session 4: Proposed Handbook Changes
Survey of Key Proposed Changes

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• Annual incentive reduction process
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Session 4: Proposed Handbook Changes
Required Job Posting Timeline

• **What**: Job posting must be entered 30–60 days before install start date

• **How**: Job Training Portal (listing date) and Tenant Education Affidavit (start of construction date)

• **Why**: To provide more time to match contractors, trainees and/or JTOs

• **When**: Job posting must predate construction start date on tenant education affidavit by 60+ days (Incentive Claim Package)
Session 4: Proposed Handbook Changes
Survey of Key Proposed Changes

Minor

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- Required job posting timeline
- **Pathway 2: Look back**
  - Electronic incentive payments
  - Grounds for SOMAH incentive payment clawback
Session 4: Proposed Handbook Changes

Pathway 2: Lookback

- **What:** Increase look back from 3 to 5 years for applicants pursuing EEC Pathway 2 compliance
- **How:** Allow participation in qualified whole-building energy programs or TCAC rehab within 5 years instead of 3.
- **Why:** To expand eligibility for recently retrofitted properties
- **When:** In force as soon as new Handbook is approved
Session 4: Proposed Handbook Changes
Survey of Key Proposed Changes

Minor

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• Pathway 2: Look back
• **Electronic incentive payments**
• Grounds for SOMAH incentive payment clawback
Session 4: Proposed Handbook Changes
Electronic Incentive Payments

• **What**: Whereas the default payment method is a physical check mailed to the applicant, the PA will offer an electronic payment option

• **How**: Applicants interested in electronic payments should email contact@CalSOMAH.org

• **Why**: Because we live in the 21st century

• **When**: Approximately 30 days after approved incentive claim package and field inspection
Session 4: Proposed Handbook Changes

Survey of Key Proposed Changes

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- Electronic incentive payments
- **Grounds for SOMAH incentive payment clawback**
Session 4: Proposed Handbook Changes  
Grounds for Incentive Payment Clawback

- **What:** Provides grounds for incentive payment clawback or reduction for noncompliance with program requirements
- **How:** Generally aligned with grounds for program removal/disqualification
- **Why:** To protect consumers and ensure incentives only fund projects compliant with all program requirements
- **When:** At any point, post-incentive payment, subject to program requirements (for example, tenant benefit and permanency requirements)
For future consideration

- Combining or “stacking” SOMAH and MASH incentives for a single project site (decision pending at CPUC)
Session 4: Proposed Handbook Changes
Combining SOMAH and MASH Incentives on a Project

• **What:** Provides the SOMAH PA guidance on whether stacking MASH & SOMAH incentives will be allowed
• **How:** Energy Division will release a Proposed Decision or Staff Proposal
• **When:** Coming soon
Session 4: Proposed Handbook Changes

Types of Proposed Changes

✓ Substantive
✓ Minor
✓ For future consideration
Session 4: Proposed Handbook Changes
Stakeholder Engagement Process

- **Oct 6**: 2019 Q4 SOMAH Advisory Council Meeting
- **Oct 25**: 2019 Q4 SOMAH Public Forum
- **Feb 5**: 2020 Q1 SOMAH Advisory Council Meeting
- **Feb 6**: 2020 Q1 SOMAH Community Based Organizations Summit
- **Feb 24**: 2020 SOMAH Investor-Owned Utility Working Group Meeting
- **Mar 19**: 2020 Q1 SOMAH Public Forum
- **Mar 20**: 2020 Q1 SOMAH Job Training Org Task Force Meeting
Session 4: Proposed Handbook Changes

Expected handbook Versioning Timeline

- **March-April 2020**: SOMAH PA finalizes Handbook redlines and Tier 2 Advice Letter
- **April - May 2020**: SOMAH PA submits Handbook redlines and Tier 2 Advice Letter
- **May (late) 2020**: Regulatory public comments/protests
- **Summer-Fall 2020**: Approval and implementation*

*Approval and implementation are subject to regulatory review and public comment processes.
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Session 5: Wrap-Up & Next Steps

Upcoming Events

- **March 24**: Webinar - SOMAH Contractor Series: Eligibility Training (every other month)
- **April 8**: Webinar - SOMAH Upfront Technical Assistance and Program Overview for Property Owners
- **Q2 2020**: SOMAH Public Forum (quarterly)
Questions & Feedback

Email: contact@CalSOMAH.org

Web form: CalSOMAH.org/contact-us

General hotline: 858-244-1177 ext. 5

Tenant hotline: 800-843-9728