



SOMAH

SOLAR ON MULTIFAMILY AFFORDABLE HOUSING

PUBLIC FORUM : March 19, 2020 (Q1)



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

Session 1: Welcome & Introductions

Agenda Overview

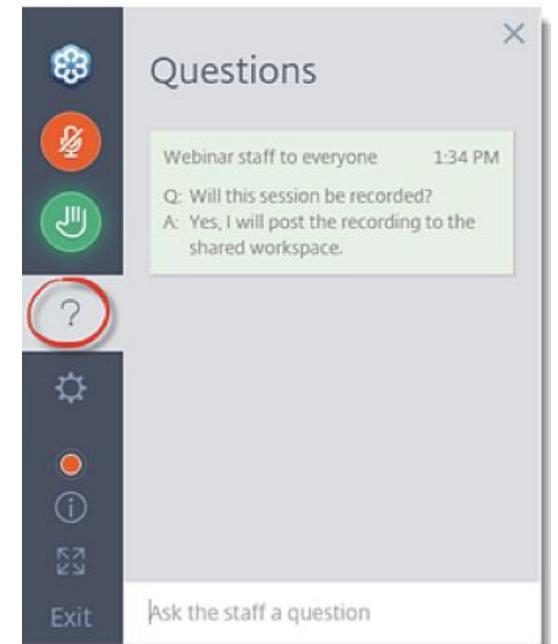


| | |
|-------------|---|
| 1:00 - 1:10 | Session 1: Welcome & Introductions |
| 1:10 - 1:20 | Session 2: Application Stats & Funding Update |
| 1:20 - 1:50 | Session 3: COVID-19 Response & Listening Session |
| 1:50 - 2:00 | Break |
| 2:00 - 3:20 | Session 4: A Preview of Proposed Handbook Changes |
| 3:20 - 3:30 | Session 5: Wrap-Up and Next Steps |

Session 1: Welcome & Introductions

Meeting Guidelines

- Q&A will follow for each session
- Verbal comments and questions
 - You are muted by default; use the hand-raising feature if you'd like to be unmuted to speak verbally
 - Please say your name and organization
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- Written comments and questions
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Session 1: Welcome & Introductions

Meeting Guidelines

- Forum will be recorded, but will not be made publicly available
- 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

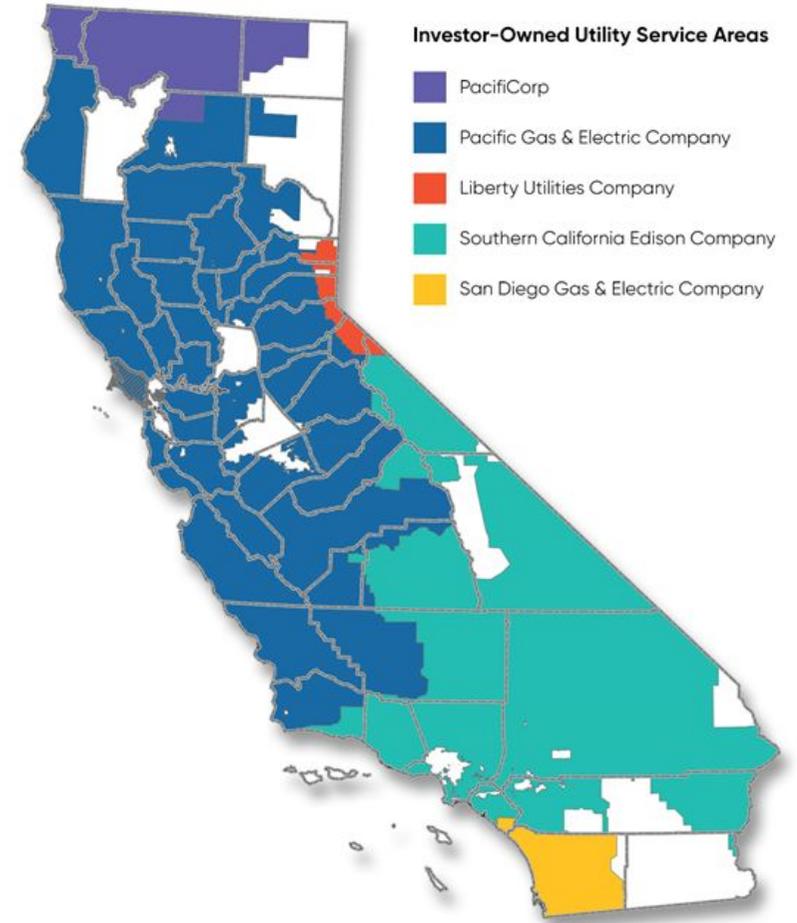


Session 2: Application Stats & Funding Update

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



Session 2: Application Stats & Funding Update

Program Summary



- 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

Session 2: Application Stats & Funding Update

Current Application Statistics



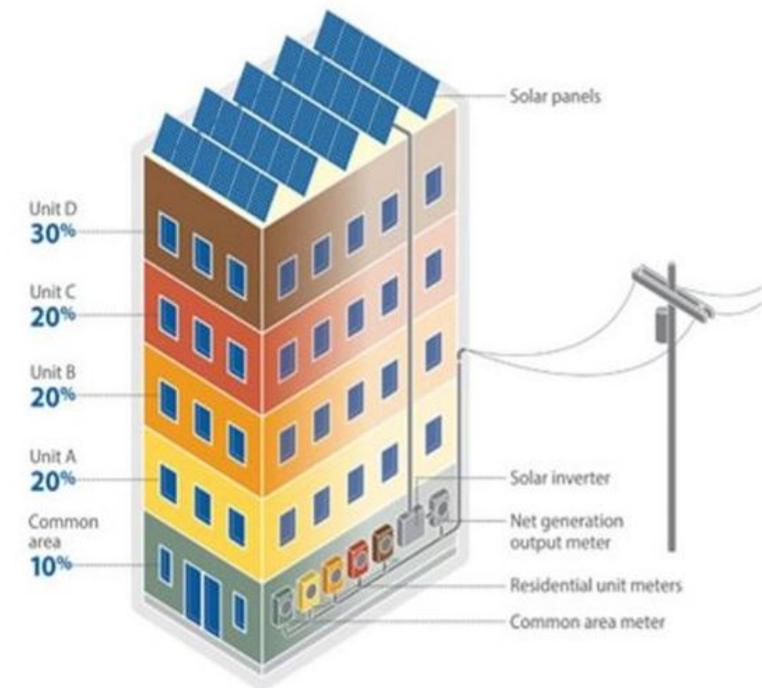
| Utility Territory | # of Active Applications | # of Waitlist Applications |
|----------------------------|--------------------------|----------------------------|
| Pacific Gas & Electric | 74 | 63 |
| Southern California Edison | 109 | 0 |
| San Diego Gas & Electric | 28 | 20 |
| PacifiCorp | 1 | 0 |
| Liberty Utilities | 1 | 0 |
| Totals | 213 | 83 |

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



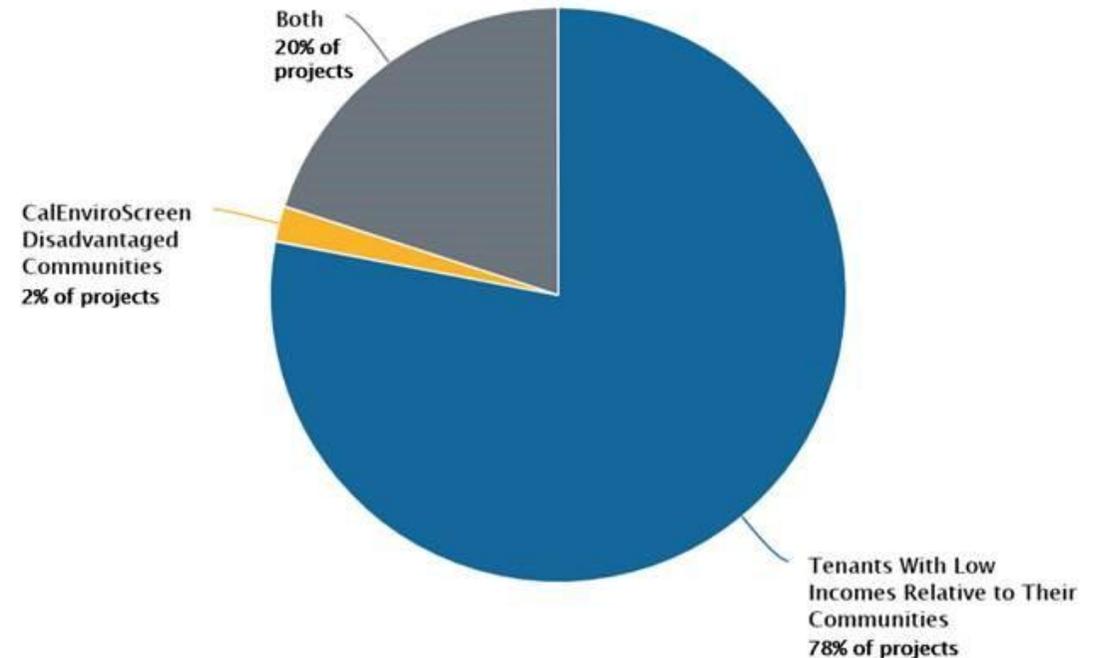
Session 2: Application Stats & Funding Update

Active Applications: DACs and Tenant Benefits



- **22%** of SOMAH's active applications are located DACs
- Tenants are slated to receive **~90%** of the electricity generated from SOMAH installations

How Projects Qualify for SOMAH



Session 2: Application Stats & Funding Update

Current Waitlist



Dedicated webpage - CalSOMAH.org/waitlist

- Funding information
- Status and estimated wait times
- Waitlist updated weekly

| Utility | Status | Estimated Wait |
|----------------------------------|----------------------------|--|
| Liberty Utilities Company | Open to applications | none |
| PacifiCorp | Open to applications | none |
| PG&E | Open to waitlist | \$41M in new funding expected in early April |
| SCE | Open to applications | none |
| SDG&E | Closed to new applications | ~1 year |

Session 2: Application Stats & Funding Update

Funding Update



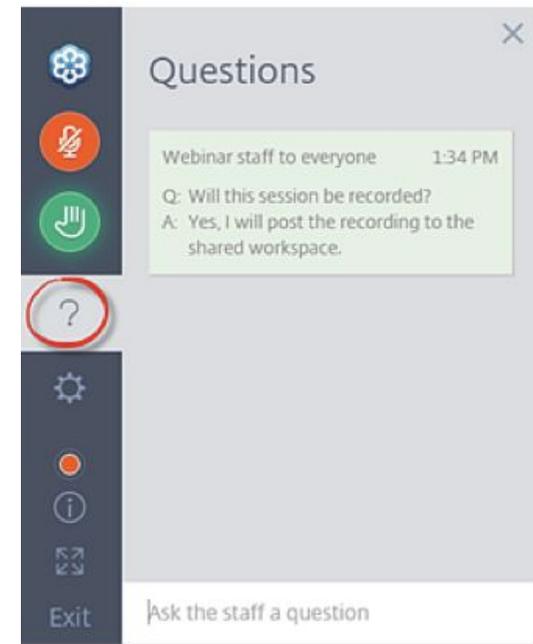
| Utility | Total New Funding | Estimated Remaining Accounting for Waitlist |
|-------------------|--------------------------|---|
| Liberty Utilities | TBA - ECAC | Funds available today |
| PacifiCorp | TBA - ECAC | Funds available today |
| PG&E | ~\$41 million (Upcoming) | \$0 |
| SCE | \$65,953,481 | \$0 |
| SDG&E | \$16,400,559 | -\$10 million (still waitlisted) |

Session 2: Application Stats & Funding Update

Listening Session



- Name and organization
- **Verbal** comments and questions
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Session 3: SOMAH COVID-19 Response & Listening Session

Hannah Warner & Sarah Hill

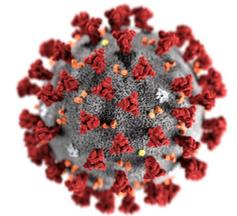


Session 3: SOMAH and COVID-19 Response

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



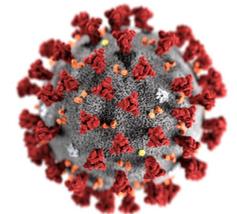
Session 3: SOMAH and COVID-19 Response

Participant Planning



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



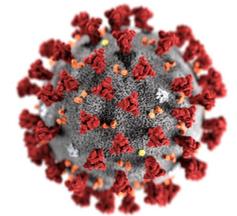
Session 3: SOMAH and COVID-19 Response

Participant Planning



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



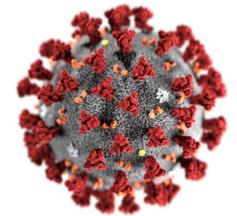
Session 3: SOMAH and COVID-19 Response

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



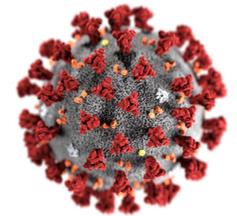
Session 3: SOMAH and COVID-19 Response

Participant Planning



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



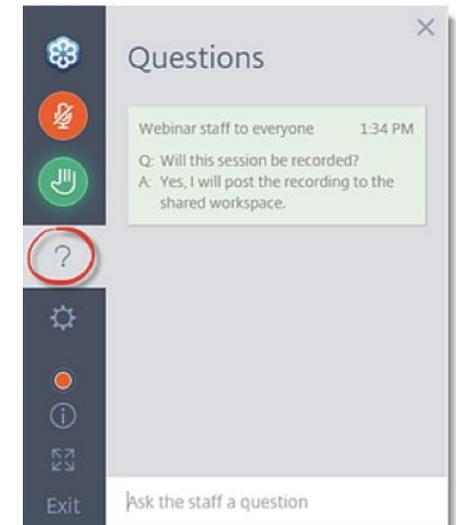
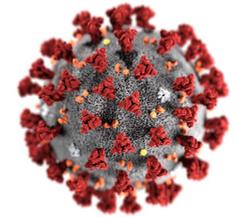
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Participant Planning



Listening session

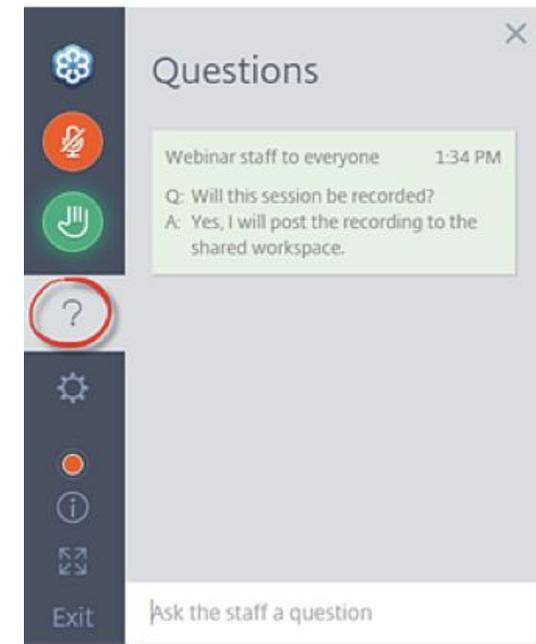
- What measures is your company/org taking to ensure the health and safety of staff and stakeholders/clients?
- How is COVID-19 affecting your SOMAH-related activities or business operations?
- What type of construction timelines and potential delays do you anticipate?
- What can the SOMAH PA help to ensure your project's success in light of COVID-19?



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Break

Reconvene at 2:00pm



Session 4: Preview of Proposed Handbook Changes

Chris Walker & Sarah Hill

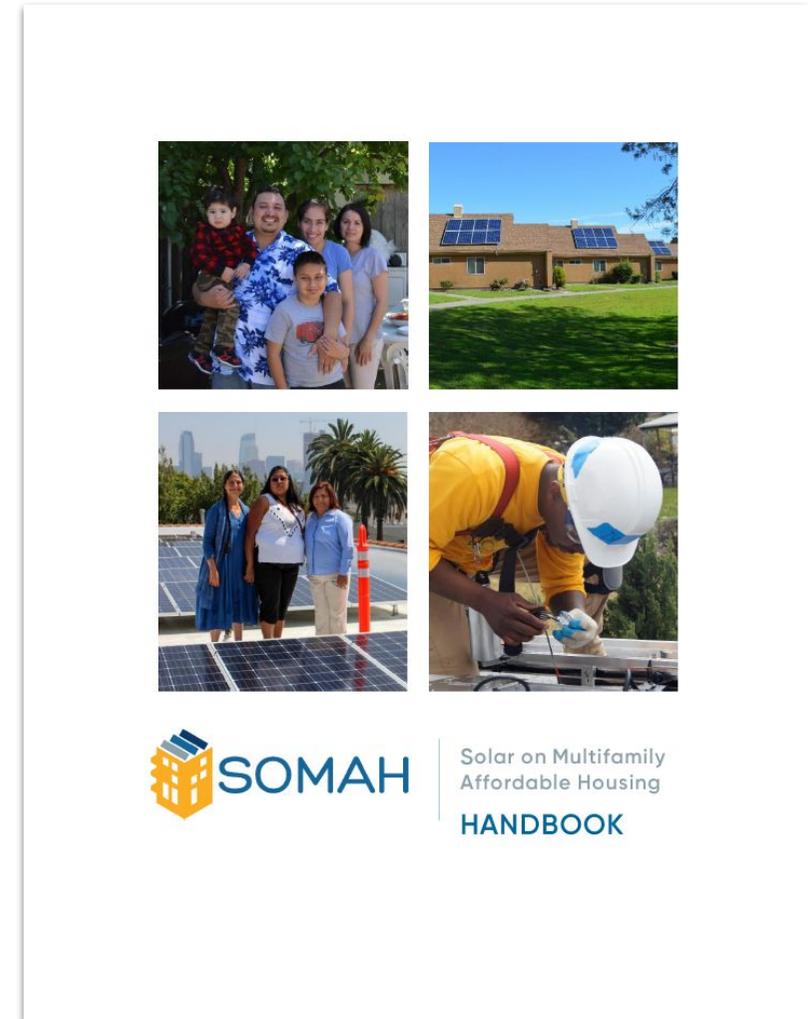


Session 4: Proposed Handbook Changes

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

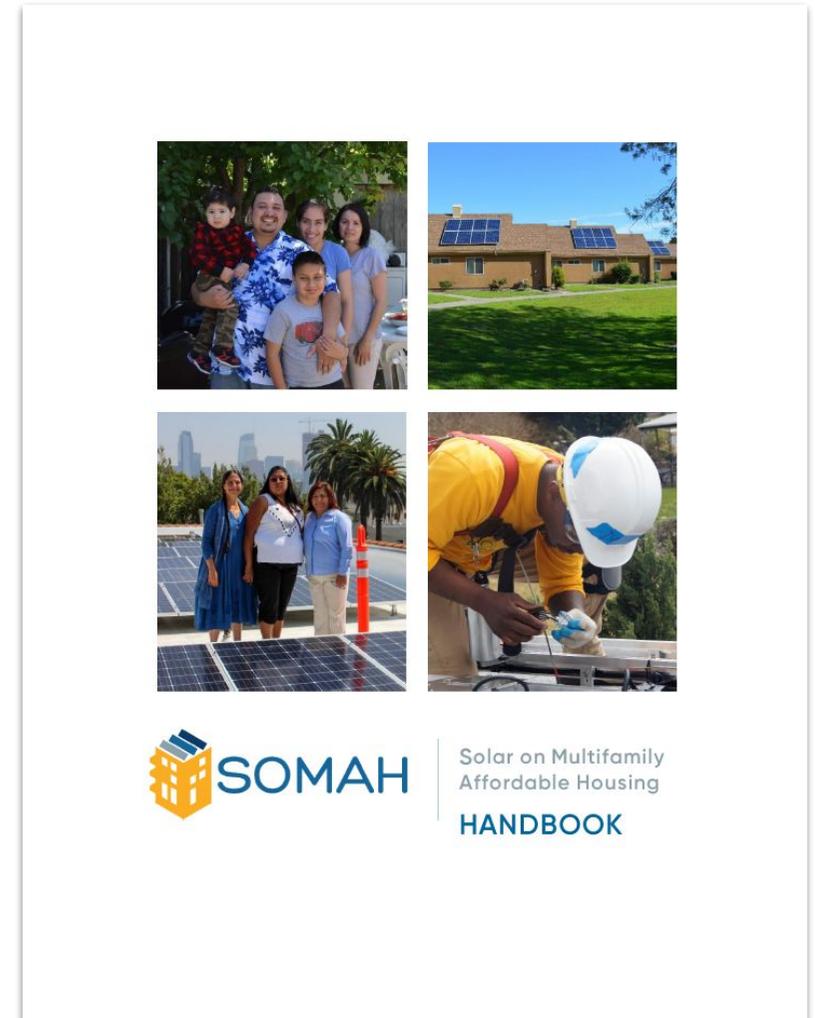


Session 4: Proposed Handbook Changes

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

Session 4: Proposed Handbook Changes

Survey of Key Proposed Changes



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

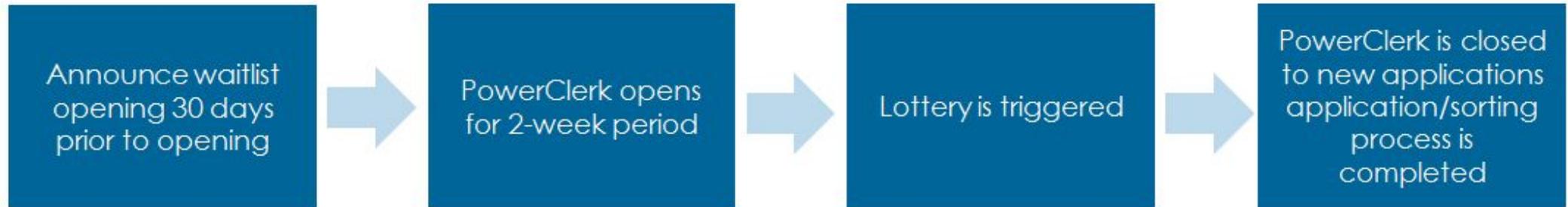
Session 4: Proposed Handbook Changes

Application Pipeline Management



Pace-dependent lottery: Scenario A

Lottery is triggered



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

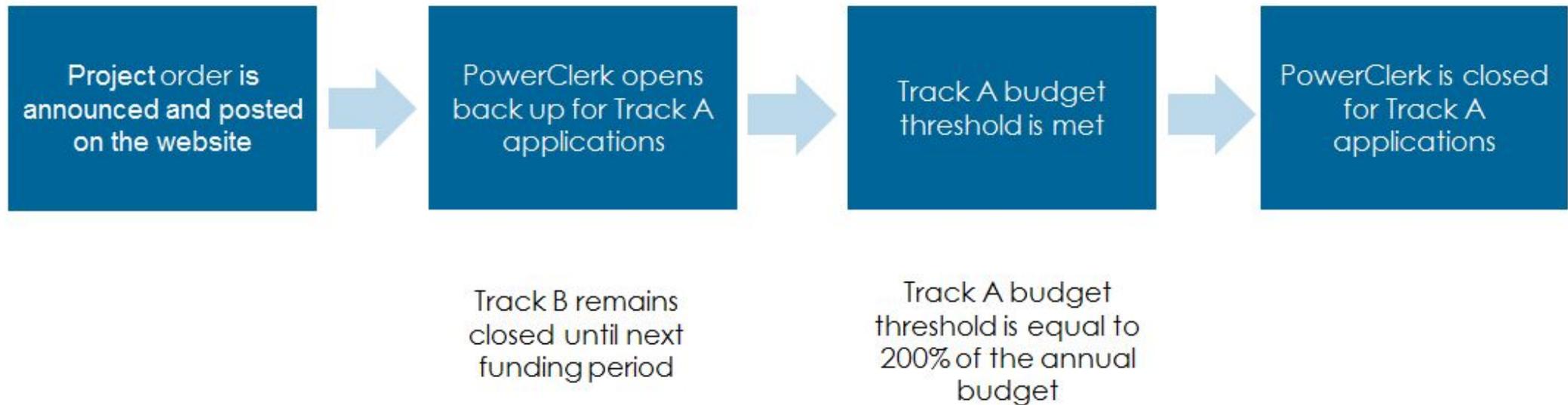
Session 4: Proposed Handbook Changes

Application Pipeline Management



Pace-dependent lottery: Scenario A

Lottery is triggered, cont.



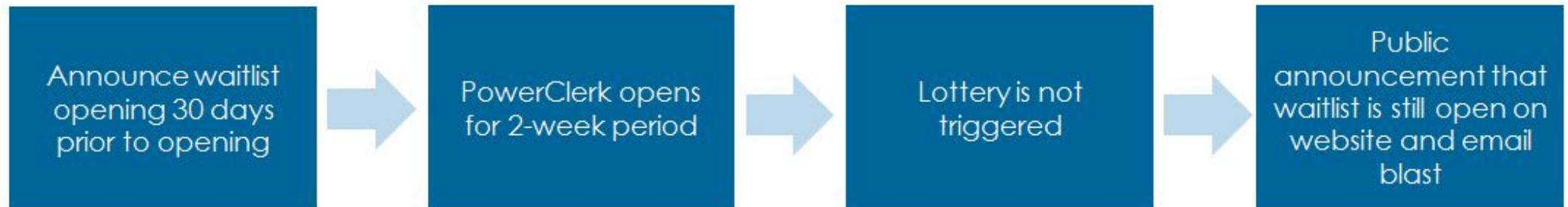
Session 4: Proposed Handbook Changes

Application Pipeline Management



Pace-dependent lottery: Scenario B

Lottery is not triggered



Lottery is triggered when applications exceed 120% of the annual budget

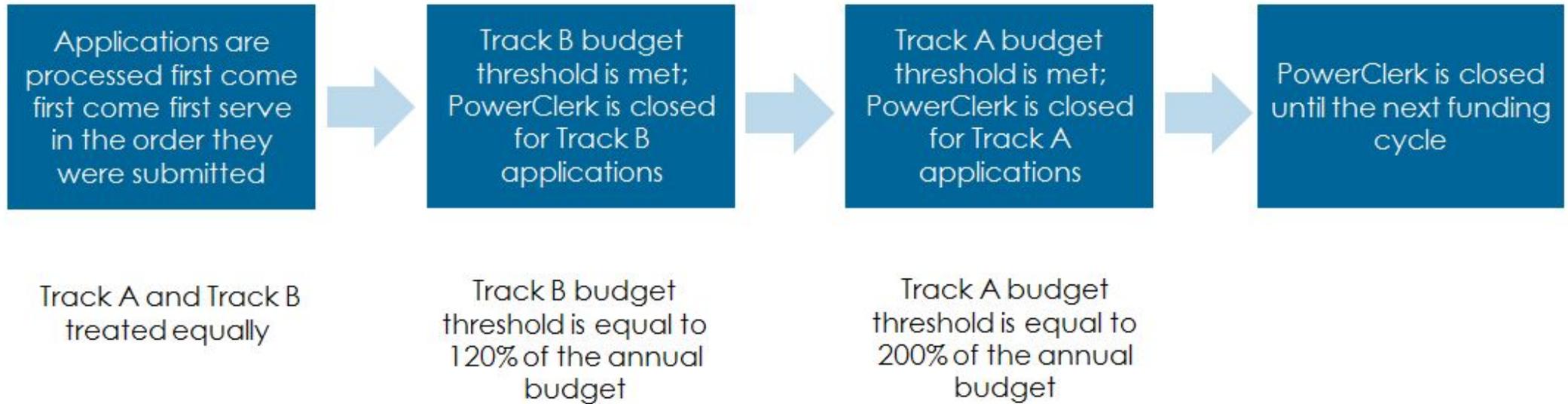
Session 4: Proposed Handbook Changes

Application Pipeline Management



Pace-dependent lottery: Scenario B

Lottery is not triggered, cont.



Session 4: Proposed Handbook Changes

Survey of Key Proposed Changes



Substantive

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

Session 4: Proposed Handbook Changes

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

Session 4: Proposed Handbook Changes

Survey of Key Proposed Changes



Substantive

- Application pipeline management
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- **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



Session 4: Proposed Handbook Changes

Survey of Key Proposed Changes



Minor

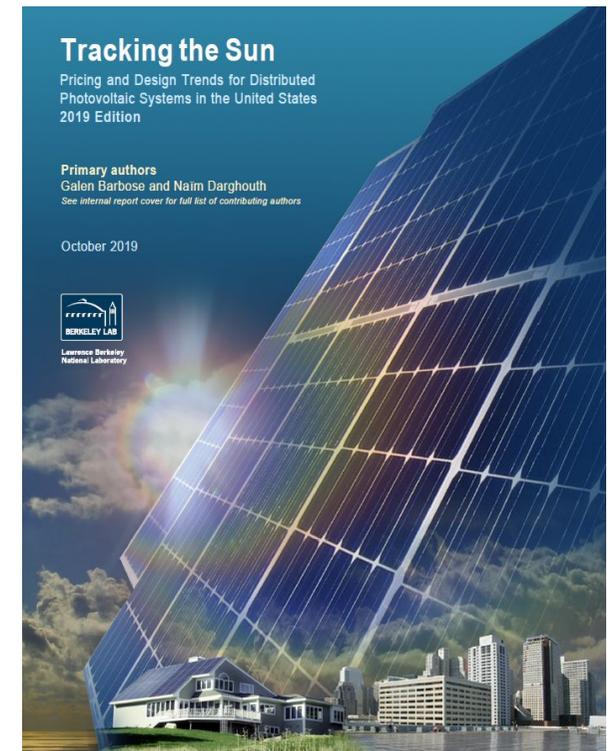
- **Annual incentive reduction process**
- No reservation transfers
- Wage requirement (contractor vs. subcontractor)
- Required job posting timeline
- Pathway 2: Look back
- Electronic incentive payments
- Grounds for SOMAH incentive payment clawback

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

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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



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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 1.4x 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

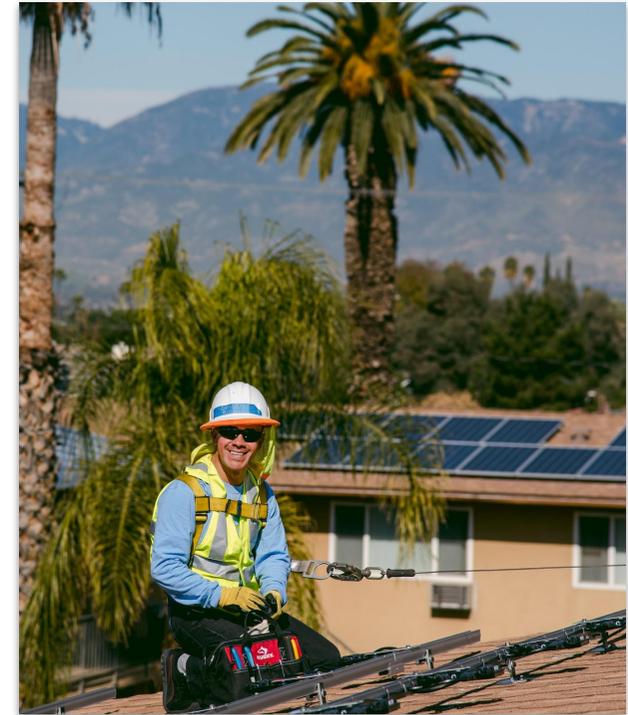


Minor

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- **Required job posting timeline**
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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



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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



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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



Minor

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- Required job posting timeline
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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)

Session 4: Proposed Handbook Changes

Survey of Key Proposed Changes



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

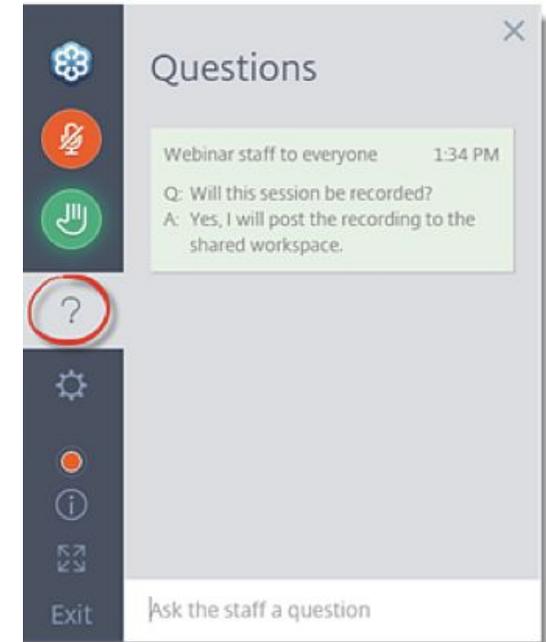
Session 4: Proposed Handbook Changes

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*

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Session 5: Wrap-Up & Next Steps

Sarah Hill



Session 5: Wrap-Up & Next Steps

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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

