

Meeting Notes

Solar on Multifamily Affordable Housing (SOMAH) Advisory Council Meeting Notes

Q1 2021
March 4th, 2020
Remote Meeting

Attendees

SOMAH Program Administrators:

Chris Walker | SOMAH Program Manager, GRID Alternatives

Jae Berg | SOMAH Program Manager, GRID Alternatives

Luis Amar | SOMAH Technical Coordinator, GRID Alternatives

Marisa Villarreal | SOMAH Program Manager, GRID Alternatives

Sarah Salem | SOMAH Tenant Services & CBO Manager, GRID Alternatives

Staci Hoell | SOMAH Workforce Development Manager, GRID Alternatives

Zara Jamshed | SOMAH Technical Coordinator, GRID Alternatives

SOMAH Advisory Council Members

Agustin Cabrera | Senior Community Organizer, Los Angeles Alliance for a New Economy

Andrea Barnier | Senior Asset Management Specialist, Self-Help Enterprises

Andres Ramirez | Policy Director, Pacoima Beautiful

Lauren Randall | Public Policy & Market Development, Sunrun

Cynthia Strathman | Executive Director, Strategic Actions for a Just Economy

JB Tengco | West Coast Director, BlueGreen Alliance

Kenneth Wells | CEO & Founder, O&M Solar Services (Chair)

Esther Portillo | Previous Acting Director, Center for Community Action and Environmental Justice

CBO Partners

Ayesha Abbasi | SOMAH Outreach Coordinator, Asian Pacific Environmental Network
APEN

Adele Watts | Communities for a Better Environment, CBE

Meeting Agenda

Welcome, Introductions, Meeting Overview

- Round-robin introductions
- Review meeting goals and agenda

Member Spotlight & Crossover Meeting Debrief

- Quick update from AC members on recent work big wins
- Brief overview of JTO TF & AC Crossover meeting

SOMAH Program update

- Key stats, milestones, and program developments
- Q&A

Equity & Accountability in SOMAH: Trainee Safety & Program Compliance

- Overview of proposal
- Discussion, feedback and vote

Equity & Accountability in SOMAH: Prioritizing DACs

- Overview: DAC memo to CPUC and setting DAC benchmarks
- Discussion, feedback and vote

Marketing, Education & Outreach: Promoting SOMAH - Working Session

- Overview of 2021 MEO strategies and audiences
- Working session: identify opportunities to co-market SOMAH

AC Transitions:

- Review proposed selection process for new cohort
- Survey: Final meeting agenda items

Next Steps & Wrap-Up

- Review any action items
- Schedule next & final meeting

Welcome, Introductions

A SOMAH Program Manager opened the meeting and led introductions for the SOMAH Program Administrators (PA), and the Advisory Council (AC) members. The manager also reviewed the meeting goals and the agenda.

Member Spotlight: Lauren Randall - Sunrun

Lauren Randall from Sunrun was the member spotlight at this meeting. Lauren shared she is trying to figure out robust mentorship for the company and has reached out to the leader of Rising Sun's Opportunity Build program, to see if they had volunteer or mentorship opportunities for the graduates of that and other programs. She is also talking to schools in Oakland about mentoring students who want to get into clean energy. She and her colleagues have been wanting to figure out how they expand their workforce pipeline from disparate communities into full time employee opportunities, beyond installer positions. If people have ideas -- workforce pipeline, mentorship, please send them her way.

Crossover Meeting Debrief

In December 2020 the Advisory Council and the Job Training Organizations Task Force had a crossover meeting to identify challenges in the program and offer suggestions. These are the key takeaways from the Q4 2020 meeting with the JTO taskforce:

Key barriers faced by contractors:

- Sales leads - need to create opportunities for bids for small contractors
- Limited financial (up front costs) and human resources for hiring, onboarding, training and being able to build the project
- Limited human resources for completing applications and staying on top of policy changes
- There are few commercial companies, they lack diversity and they are constrained
- A member is working for a small commercial company and they didn't know about the program

Key questions and considerations presented by JTO Task Force and AC members:

- Trainee "success" should be seen as the number of resulting full time jobs. Do contractors have issues finding trainees?
- Who are the subcontractors participating in the program (how many, specialization), and what scale of work they are doing?
- What is the subcontractor relationship with trainees?
- How can we make the program accessible to small contractors?

Suggestions for trainee and contractor participation:

- For SOMAH job trainees
 - Aim for 100% benchmark on percentage of trainees that are local hires
 - Increase the number of trainees required for all projects
 - “Local” hiring definition needs flexibility, radius around a project may be better than county
- To support contractor participation and diversity
 - More support with administrative/application work for smaller contractors
 - Outreach to small contractors via CALSSA and other industry membership groups
 - Look for ways to make it easier for smaller contractors before capping larger ones
 - Set aside projects for smaller contractors
 - Capital partners to fund the projects for small contractors, loans (no/low interest, revolving loans
 - Upfront SOMAH payments for small and BIPOC contractors
 - Identify POC, women, and LGBT-owned contractors and provide targeted outreach

SOMAH Program update

The SOMAH PA provided an overview of key program metrics. Here are some highlights:

- SOMAH has 68.2 MW AC of solar capacity in applications out of the 300MW goal and the applications will serve over 32 thousand tenant households.
- There are no waitlists at the moment, and there is incentive money available in all utility territories.
- SCE has the largest budget but it's currently serving less tenant households as PG&E
- The average SOMAH project is about 177 kW and serves an average 83 tenant units, they are essentially large projects.
- According to the Avoided Emissions and Generation Tool AVERT from EPA, the 68.2 MW AC that we have in applications could potentially save annually: 66,800 tons of CO₂, 5,140 pounds of fine particulate matter (PM_{2.5}), 32,870 pounds of

Nitrogen Oxides (NOx), 6,390 pounds of sulfur dioxide SO₂

- This could add up to 0.4% of emissions in the state in May for example.
- We got a very large number of applications as soon as the program opened, the trend shows the significant drop in application numbers until today. We'd like to encourage you to help us promote the program.
- Applications in disadvantaged communities (DAC) by utility: We have 118 applications with a capacity of 19.7 MW of solar, serving over 9 thousand tenant households
- Even though PG&E has a greater number of applications, SCE has a greater number of projects in DACs
- We are starting to see some changes in the contractor picture. Highlands Energy Services and SolarQuote are new contractors from Fresno (possibly small contractors) that have applications for small buildings of 15 and 16 tenant units. As we can see, current possibly larger contractors have on average larger buildings between 40 to 144 tenant units and the overall average is 83 tenant households.
- We also saw another potential new contractor Sunworks from Roseville, who unfortunately withdrew their application. We have surveys for the contractor and the property owner to try to understand what their challenges were and Verdant is researching program participation challenges as well.
- Something to note is that Highlands energy services is a certified Disabled Veteran Business Enterprise and Minority Business Enterprise

Trainee Safety & Program Compliance

The PA and Advisory Council members discussed a reported safety and discrimination complaint from a trainee hired by a SOMAH contractor during a SOMAH project.

The SOMAH PA outlined some goals in reference to the trainee's complaint, which included:

- Addressing the trainee's complaint
- Providing resources for preventing similar incidents in the future, and
- Ensuring the Program has options for recourse in case of future incidents.

Some potential measures discussed included:

- Handbook changes to include a participant code of conduct tied to SOMAH's system of infractions, failures, and program removal
- A "know your rights" training series and informational materials for SOMAH trainees
- A portal to send complaints more easily to the SOMAH PA and resources on reporting workplace violations to state and federal authorities
- Contractor trainings and resources on safety, workers' rights, and best practices for diversity, equity, and inclusion.

The PA and members generally discussed the importance of safe and equitable workforce development practices within the SOMAH program and the contours of the PA's scope and role in light of state and federal authorities' jurisdiction over safety and workplace discrimination complaints and PA capacity. Members also generally discussed the role of job training organizations, contractor eligibility requirements and training, and other potential compliance mechanisms.

A consensus check confirmed that members were in general agreement that ideas presented would adequately address the trainee's complaint, provide resources for prevention, and ensure the Program has options for recourse in case of future incidents. One member abstained. The PA committed to further stakeholder engagement and a stepwise process for further developing its proposal, which will be presented at the next quarterly meeting.

Equity & Accountability in SOMAH: Prioritizing DACs

The SOMAH PA is interested in channeling more projects to Disadvantaged Communities (DACs) as defined by CalEnviroScreen, to provide additional environmental and economic benefits in these communities, and asked the AC to engage in a discussion for how to achieve this.

Overall Context

- The percentage of DAC properties that are currently participating in the program are at parity with the total percentage of eligible properties in DACs.
- There is, however, a shared interest in driving further engagement, specifically from the CPUC, which requested a memo in Oct 2020, from the SOMAH PA to

discuss it's statistics and efforts around DAC participation. This was discussed at a Jan 2021 CPUC-PA meeting

- The memo included an overview of current and planned efforts, as well as proposed strategies by the SOMAH PA on how to ensure high participation from DACs.
- The proposed strategies included financial, participation, and marketing and outreach strategies and included:
 - A DAC carve-out or set-aside
 - Having a separate/higher incentive rates for DACs, or incentive structure that scales with CalEnviroScreen 3.0 score
 - Waiving application deposit or incentive step-down
 - Imposing DAC quotas on higher volume contractors
 - Creating a referral program
 - Working with a lead generation company/org
 - Offering a prize, award, or competition

Overall Market Context

- The PA gave an overview of the actual potential capacity in DACs.
- SOMAH has a total of 3,427 potentially-eligible properties, with a potential capacity of 544 MW (SOMAH goal = 300 MW by 2030). This estimation based on the total number of potentially-eligible properties, proposed system size and tenant units by IOU territories
- 1,100 out of 3,427 SOMAH-eligible properties are located in DACs. Note: there are no DACs in Liberty or PacifiCorp territories
- Estimated capacity of 195 MW or 36% of the total 544 MW capacity for all of SOMAH

IOU	# of eligible properties in DACs	% of eligible DAC properties (across all IOUs)	% of properties in DACs from total # of eligible properties (per IOU)	# of units in DACs	Projected DAC capacity (kW CEC-AC)
PG&E	582	53%	29%	51,266	95,073
SCE	453	41%	45%	37,310	86,701
SDG&E	65	6%	19%	6,655	13,313
Total	1,100			95,231	195,086 kW
					195.1 MW

- The percentages in the table above, determine which IOUs would benefit most from a program intervention exclusive to DAC properties.
 - PG&E has 582 or 53% of all of the 1,100 SOMAH-eligible properties in DACs, but those 582 properties make up only 29% of the total 2,031 SOMAH-eligible properties across PG&E territory.
 - SDG&E would benefit *least* from a DAC carveout, since only 13 out of 65 active applications in DACs, and those may have already been served by MASH or LIWP
 - SCE would benefit most from a DAC carveout, because it has 30% of the total SOMAH-eligible properties, but 41% of the properties in DACs (61 out of 118 active SOMAH applications in DACs are in SCE), and SCE has the largest share of SOMAH budget
- The PA will also continue to coordinate with the Commission and engage the DAC-Advisory Group and Low Income Oversight Board to further the discussion.

The PA led a discussion around how to ensure we're balancing the need for geographic diversity with an emphasis on DACs which could favor narrow geographies? The following questions were posed to the AC members for feedback. Discussions were done in small breakout groups

1. Budget:

- How could a carve-out be designed as not to slow progress toward our 300 MW goal?
- Are higher incentives for DACs inherently problematic if they lead

to/support higher prices in DACs?

2. Participation

- Quotas assume contractors will submit additional applications. How could this work amid slowing application volume from all participating contractors?

3. Marketing, Education, & Outreach

- How could a referral program be designed to attract applications from DACs? Who are the likely referrers?
- Have other CPUC programs worked with lead gen companies? Are they a potentially-viable solution or is SOMAH and the multifamily space fundamentally a bad match?
- Are contractors responsive to prizes, awards, or competitions? Is “naming and faming” sufficient to motivate action? How might this hit our budget?

The discussion is below:

Discussion/Report-out

Group 1 Report-out:

- Discussed having an informal benchmark initially to pilot or to incentivize instead of doing a formal budget carveout. And do we even need a carveout if funds are readily available?
- An informal benchmark would be the best first approach to see if the goal can be reached without a program change.
- However, a carve-out would give priority to DACs that have been left out on so many opportunities in the past.
- Suggest using the number of properties, rather than kW capacity as a metric for setting goals/targets. kW capacity could be easily filled out by a few select or large projects. If we go capacity contractors will focus more on properties with larger capacity instead of overall participation.
- Participation should be a priority rather than capacity
- The PA should provide flexibility for the type of properties in a certain geographic area. And provide support for contractors to help incentivize choosing DAC properties, if there are obstacles for the project (i.e need a new roof, electrical upgrade.)

Group 2 Report-out:

- In favor of setting capacity targets, to give more flexibility and help reach a higher MW goal.
- Geographic diversity - we are already focusing on low income housing and low income people getting jobs and solar. We have to be careful that we don't add more program restrictions.
- Beyond DAC's, it's important to have affordable housing in other areas for desegregation. We don't want to think that those properties are not important, they are important for a different reason.
- Affordable housing in non DAC areas is increasing economic integration, which could be a good in its own right, so seeing those projects as less of a priority could be neglecting an important de-segregating mechanism.
- Want SOMAH to overlap with other decarbonization-related programs -- i.e. SGIP.
- Q: Is there a team within the CPUC or Energy Commission that is making connections between different funding streams and incentive programs (solar, EVs, batteries, etc.)?

Group 3 Report-out

- Suggest doing more proactive outreach to contractors to help meet the programs goals and benchmarks
- In order for contractors to be successful they need help targeting clients and potential property owners, and SOMAH should be providing more support in this sense. Helping smaller, newer contractors connect with potentially eligible properties.
- Attaining geographic diversity is possible, given where SOMAH eligible properties are located -- and we should be thinking about diversity beyond geographical to include metropolitan vs rural vs suburbs.
- Q: How do the DACs compare to the established high opportunity zones?

General Discussion:

- AC member: How much outreach is currently happening in DACs?
- PA member: Our application pipeline is largely contractor driven -- they're reaching DACs approximately on par with their share of potential properties. Contractors will talk to any property owner that will listen, so we have a pretty representative number of properties that are in DACs right now.

- PA member: We want to increase our MEO to emphasize DACs which will have better than parody with regards to DAC participation.

Marketing, Education & Outreach: Promoting SOMAH - Working Session

This session was a working session designed to have SOMAH AC members identify specific actions they could commit to taking in order to promote the SOMAH program. The program had an initial influx of apps the first year of the program, and the PA is looking to implement strategies that help maintain participation and new application submissions over the lifetime of the program. The PA is looking to the AC to help promote and build more awareness about the SOMAH program. The SOMAH PA asked the AC to come up with 3 ways or actions to increase awareness of SOMAH among their communities, colleagues, and networks.

The following questions were posed to the AC members for feedback. Members were asked to first answer individually and then discuss in small groups.

1. What are 3 actions you can take to help spread awareness about SOMAH in your networks and communities?
2. What resources can the PA provide to support?
3. What are strategies and tactics for reaching SOMAH's audiences that you have seen be successful within your organizations and communities?

Discussion/Report-out

Group 1

- We could use email and social media to send messages about SOMAH, but that may be diffuse, since our audiences are not as targeted as those participating in SOMAH.
- We can potentially help most in reaching the affordable housing community.
- Our group has members who are in LADWP territory which is not a SOMAH eligible IOU territory, therefore their contacts wouldn't qualify
- Suggestion and offer to help connect with county supervisor's offices

- Suggestion to do direct outreach via phone, target affordable housing trade associations and local electeds who have constituent outreach capacity and interest

Group 2:

- Suggestion to do 1-on-1's with affordable housing organizations in the advocacy space.
- Building more connections with the California Solar & Storage Association (CALSSA), which works a lot with contractors, through their weekly member meetings, or newsletter articles.
- The PA can provide talking points to use when talking to officials, techniques or language for emails, etc.
- Strategies and tactics that have been successful for their organizations have been: emails and social media posts with attention-grabbing headlines, and webinars with industry experts -- that's how you get an audience for the industry you are targeting.
- Suggestion to partner with coalition groups to advocate for SOMAH

Group 3

- Question to clarify whether AC members would be promoting SOMAH as individuals or their organizations. As individuals there was a suggestion to have more social media content to post on LinkedIn and Twitter, specifically. Self-Help Enterprises offered to post something on their website and newsletters and outreach to tribal communities if that's a priority for SOMAH.
- We want to make sure that information is flowing through subcontractors, right now we have 24 subcontractors working on SOMAH projects, for example if there are JTO resources it can improve some of these projects.

General Discussion:

- AC member: The new social media channel Clubhouse is one to explore, though it is not as targeted.
- AC member: I support the idea of connecting with county supervisors. Recently we did a presentation to a neighborhood group with designs for affordable

housing, letting them know that these programs exist and they may ask the developers if they have considered them.

- PA member: In the remote environment we are trying to build brand awareness. Webinars, panels and speaking events where we as a SOMAH PA member could come and speak about the program and answer questions would be beneficial.
- AC member: When we first were selected to be members we were given a great short material about the program to add to our social media. Content like this that we can just copy and paste is helpful.
- AC member: I would like to add in LinkedIn that we are part of this council and could also post something about the progress that we have made to-date. Something that also shows we have at stake in this and shares what the program goals are with a graphic.
- AC members: Suggest doing a program update with talking points at CALSSA. Those members are talking to electeds across the state. I would be happy to send to the listserv an update from SOMAH. The industry still has an image that solar is for rich white people and what SOMAH is doing is really important for members to have an update and to be able to communicate it.
- PA member: By dispelling that solar is only for that rich white person, it allows us to show how SOMAH is promoting equity
- AC member: Having talking points for webinars is helpful to know how to advocate for solar in new affordable housing developments. Also wanted to suggest a webinar specifically for elected officials so they know how to advocate for the program to make sure this is part of the design of new affordable housing.
- AC member: The SOMAH team should talk about strategies, and take some time to think about what is at stake here. Specifically around net metering and how that's going to impact solar in California. There's a lot at stake, and getting more people to rally around this is important for the future of solar and any new programs in California. Most of us should be involved, and advocating for this program, and why it's important.
- PA member: We could host an event or create materials around SOMAH's impact and what the implications of SOMAH's success are: equity and affordable energy - creating those talking points and turning them into derivative content.

AC Transitions

The PA has started the planning to select the second cohort of AC members, given the 2 year term for this current cohort is coming to a close, with the next Advisory Council term occurring from Q3-2021 through Q3-2023. The SOMAH PA asked for the current members, who are eligible to run for a second 2 year term, to indicate and confirm whether they were interested in being part of the second cohort. Most said yes.

The PA then shared some updates that would be implemented for the next AC cohort, and some information about the application and selection process:

- Advisory Council Composition: It will be similar to the current cohort and it'll have 11 members instead of 9. The SOMAH PA will be adding a public sector/gov agency seat and tribal community representative.
- The original Structure and Framework Proposal called for 11 members; we seated 9. Which are (3) EJ, (2) consumers/tenants; (2) labor/WFD; (2) housing; (2) solar industry. We are interested in adding another housing seat (housing authority) or public sector seat. Geographic location is part of the consideration and we are looking for more CBO participation
- Application: There will be a competitive application process, similar to the last selection process for the current AC cohort.
- Selection: There will be a third party Selection committee with independent members. The current AC members that aren't interested in continuing and CBO staff might be able to help us getting the word out
- We'll get input from the PA regarding the selection criteria, promotion and nominations and they will not participate in candidate review/selection

The last AC meeting for the current cohort will be in Q2 2021, and proposed agenda topics for the final meeting were:

- Timely topics (DAC updates, trainee safety updates)
- AC Cohort 2.0 selection process updates
- Reflections & feedback -- highlighting AC successes (2 years in review)

- How AC members can still stay involved and have impact (other advisory groups, or staying active as “ambassadors”)

The SOMAH PA asked if there were any other ideas for agenda topics for the last meeting. SOMAH AC members' ideas for additional topics, discussion, and follow up included:

- Raising awareness on some of the successes of the Advisory Council.
- How members who are not going to be continuing on the Council can stay involved and connected to SOMAH.
- Outreach to recruit, what the process would be and how we can get the word out to get a pool of folks.

Next Steps & Wrap Up

The following are action items and next steps from this meeting:

- The PA will follow up with post-meeting survey regarding trainee safety, request for testimonials and DACs
- The PA will follow up with additional details about AC 2.0 application and selection process
- The date for final meeting will be on Thursday June 3rd 2 to 2.5 hours