



# SOMAH

SOLAR ON MULTIFAMILY AFFORDABLE HOUSING

## **PUBLIC FORUM:** September 1, 2021



# Welcome & Introductions

## Agenda Overview

1:00-1:10	<b>Welcome &amp; Introductions</b>
1:10-1:30	<b>Session 1:</b> Program Update & Announcements <ul style="list-style-type: none"><li>• Key program stats &amp; updates</li><li>• Contractors State License Board (CSLB) Announcement</li><li>• Q&amp;A/Discussion</li></ul>
1:30-2:10	<b>Session 2:</b> Making the most of SOMAH's Technical Assistance Services <ul style="list-style-type: none"><li>• Overview of SOMAH's technical assistance (TA) offerings</li><li>• TA case-study walk-through</li><li>• Review of SOMAH's other services</li><li>• Q&amp;A/Discussion</li></ul>
2:10-2:20	<b>Break</b>
2:20-3:00	<b>Session 3:</b> Upcoming Program (Handbook) Changes <ul style="list-style-type: none"><li>• Preview of upcoming program changes and high-level timeline</li><li>• Q&amp;A/Discussion</li></ul>
3:00-3:05	<b>Looking Ahead &amp; Next Steps</b>

# SOMAH Stands with Black Lives Matter



SOMAH stands in solidarity with Black Lives Matter and with all who are fighting for an equitable and just future. These are SOMAH's driving principles, a program that exists, thanks, in large part, to the advocacy of frontline communities striving for energy equity and environmental justice. We remain steadfast in our commitment to equity through a community-based approach that amplifies the voices of frontline communities and ensures we listen to and are responsive to the communities the program serves through public forums, direct outreach and education.

# SOMAH in solidarity with our CBO Partners



## Love our People, Heal our Community:

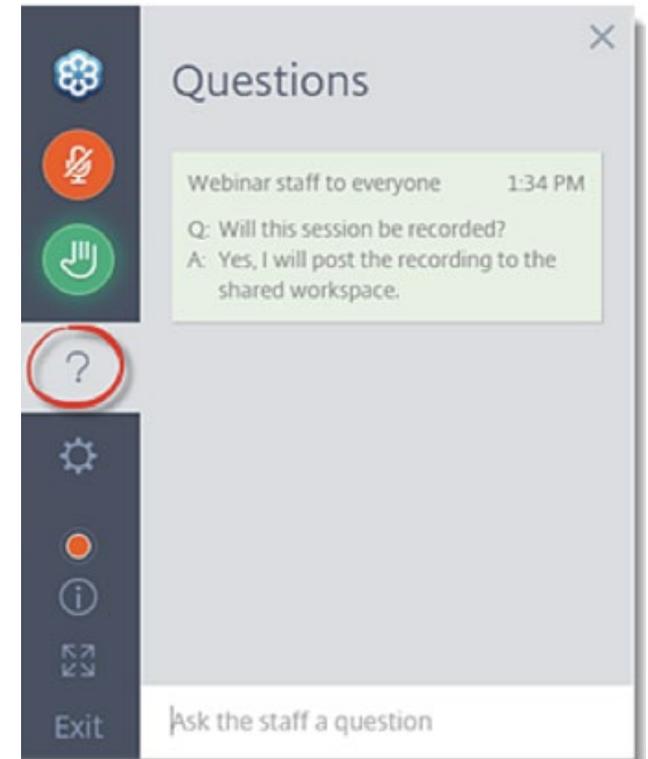
We condemn the violence against California's Asian communities and support the call to action by our SOMAH community-based organization (CBO) partners at Asian Pacific Environmental Network (APEN) for investment in long-term, community-centered solutions.

For more information please visit [stopaapihate.org](https://stopaapihate.org)

# Welcome & Introductions

## Meeting Guidelines

- Q&A will follow after each session
- Verbal comments and questions
  - Muted by default; use the hand-raising feature to be unmuted
  - Please say your name and organization
  - To allow the PA to respond, please ask questions or make comments one at a time
- Written comments and questions
  - Use the chat box or to write in your comment or question



# Welcome & Introductions

## Access & Follow Up

- Forum is recorded but 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 five (5) business days
- Additional questions and comments:  
[contact@CalSOMAH.org](mailto:contact@CalSOMAH.org) (858-244-1177, ext. 5)

# Welcome & Introductions

## SOMAH Program Administrator Team



### Program Administration

**Jae Berg** | SOMAH Program Manager  
**Chris Walker** | SOMAH Program Manager  
**Hannah Warner** | SOMAH Program Manager  
**Marisa Villarreal** | SOMAH Program Manager  
**Luke Ballweber** | SOMAH Program Manager  
**Laura Wong** | SOMAH Program Manager  
**Jaimie Joo** | SOMAH Program Coordinator  
**Valery Franco** | SOMAH Program Coordinator  
**Victoria Leslie** | SOMAH Program Rebate Processing Specialist  
**Bonnie Roberts** | SOMAH Field Inspector

### Technical Assistance

**Sarah Hill** | SOMAH Program Manager  
**Staci Givens** | SOMAH Program Manager  
**Luis Amar** | SOMAH Technical Assistance Specialist  
**Zara Jamshed** | SOMAH Technical Assistance Specialist

### Workforce Development

**Staci Hoell** | SOMAH Workforce Development Manager  
**Ingrid Murillo** | SOMAH Workforce Development Coordinator

# Welcome & Introductions

## SOMAH Program Administrator Team



### Marketing, Education & Outreach

**Brittany Chenier** | SOMAH ME&O Manager

**Vallerie Gonzalez** | SOMAH ME&O Manager

**Kajsa Hendrickson** | SOMAH ME&O Manager

**Poolak Forutanpour** | SOMAH ME&O Manager

**Margee McDonnell** | SOMAH ME&O Coordinator

**Omar Rocha** | SOMAH ME&O Coordinator

**Lucy Moua** | SOMAH ME&O Coordinator

**Mai Fang** | SOMAH ME&O Coordinator

**Sarah Salem** | SOMAH Senior Tenant Services & CBO Manager

**Sana Sheikholeslami** | SOMAH Tenant Services & CBO 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

**Rachael Diaz** | Sustainable Housing Program Associate, California Housing Partnership



# Session 1: SOMAH Program Update

Mai Fang

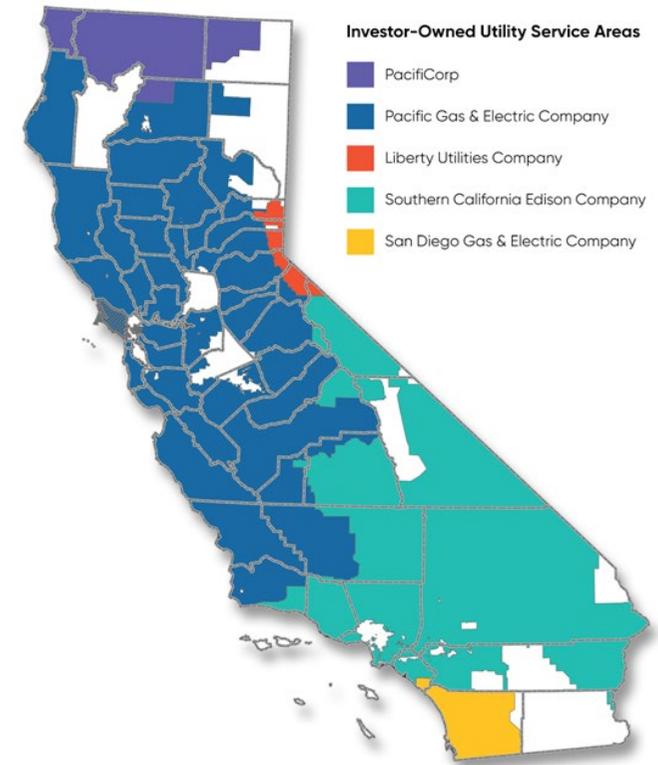


# Session 1: SOMAH Program Update

## Application Breakdown



Utility Territory	# of Active Applications
Pacific Gas & Electric	200
Southern California Edison	117
San Diego Gas & Electric	51
PacifiCorp	1
Liberty Utilities	2
<b>Totals</b>	<b>371</b>



# Session 1: SOMAH Program Update

## Where We Are Today



*All territories are open to new applications with no waitlists*

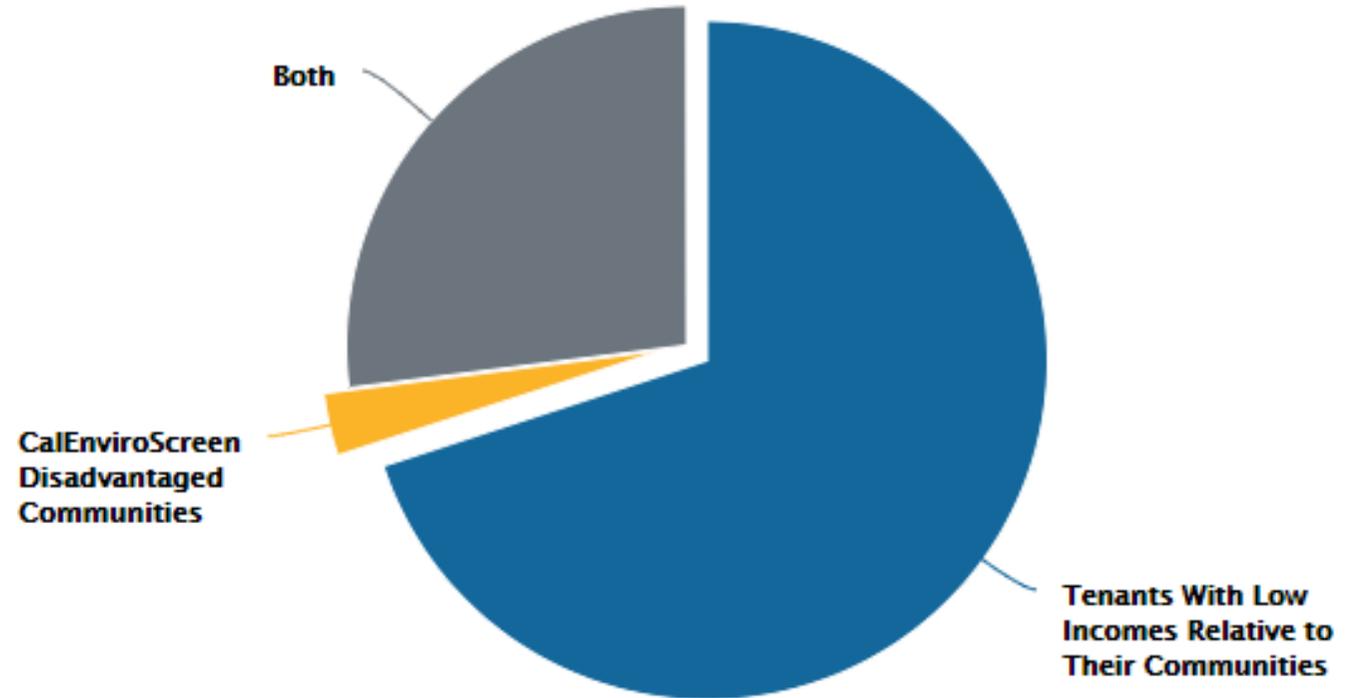
<b>Utility</b>	<b>Available Funding</b>	<b>Status</b>
<b>Liberty Utilities</b>	~\$952,000	Funds available today
<b>PacifiCorp</b>	~\$3,830,000	Funds available today
<b>PG&amp;E</b>	~\$108,025,000	Funds available today
<b>SCE</b>	~\$154,261,000	Funds available today
<b>SDG&amp;E</b>	~\$31,847,000	Funds available today

# Session 1: SOMAH Program Update

## Where We Are Today



- **29%** of SOMAH's active applications are located in Disadvantaged Communities (DACs)\*
- Tenants are slated to receive **~86%** 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 Update

# Additional Program Statistics

- Serving **30,438** tenant units
- Average system size: **160** kW
- 12 participating contractors
  - 6 subcontractors currently reported
- Pipeline supports **700** job training opportunities
  - **47,240** projected training hours
  - Nearly **\$950k+** in projected wages
  - Leveraging over 60 job training organization relationships



## Session 1: SOMAH Program Update

# Additional Program Statistics

- Progress Payments
  - **132** projects currently eligible for Progress Payments
  - **5** progress payments issued (\$1,639,041)
  - **1** in process for payment
- Incentive Claims
  - **6** final incentive payments issued (\$2,193,067)
  - **7** close behind at Incentive Claim Milestone, inspection, and pending payment
- Upcoming activity
  - **14** projects have upcoming incentive claim due dates in Q3 & Q4 2021
  - **154** projects with incentive claim due dates in Q1 & Q2 2022

# Job Training: Resources & Expectations



## Jobsite experience and safety:

- Contractors should ensure a safe and harassment-free workplace for job trainees and tenants.
- SOMAH collects job trainee feedback to evaluate the job training experience and is developing resources to support safe and inclusive experiences for all program participants.



# Session 1: SOMAH Program Update

## Program Evaluation Phase II



### Phase II Planned activities:

- Interviews & web surveys
- IOU data requests
- Impact Analysis:
  - Energy (kWh)
  - Environmental (GHG)
  - Economic (\$ bill savings)
- Metric Assessment
- Comprehensive Final Report

### Timeline:

- August 2020-June 2021: Data collected
- September 7, 2021: Draft report to be released
- September 17, 2021: Public webinar from 10am-11:30am
- October, 2021: Final report to be released

## Session 1: SOMAH Program Update

# Incentive Step-down Update



- Incentive step-down takes place annually on July 1
- Use a National Renewable Energy Laboratory report to determine % of incentive step down
- We received the report earlier this week, and are going through the analysis to determine the annual step-down
- Current extension ends on October 29
- PA Team will share analysis and updated incentive amounts via webinar

# Session 1: SOMAH Program Update

## COVID-19 Impacts & Updates



### Energy Efficiency Compliance Milestone **Reminder**

- Ending the option to postpone EECM on **Sept. 13**
- PA has seen applications are able to meet EECM requirements - good time to revert back to original requirements
- Tying this to the reopening of California
- People will have 90 days after the state re-opens (on June 15) before this option will be removed, to provide ample notice to projects requesting postponements

## Contractors State License Board Update

- On July 27, Contractors State Licensing Board (CSLB) voted to restrict the installation of battery energy storage systems to the **C-10 license** classification
- Beginning November 1, 2021, the **C-46 license** classification can no longer install energy storage systems
- The SOMHAH PA would like to better understand the impacts of this decision on our participating and interested contractors

# Discussion

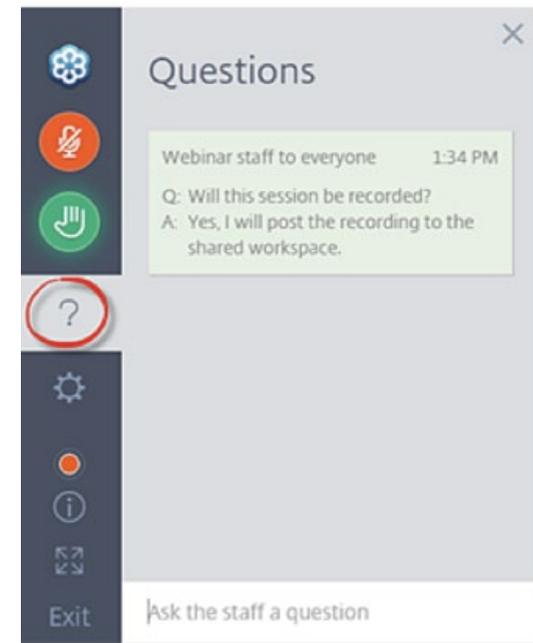
## CSLB Licensing Update

# Session 1: SOMAH Program Update

## Q&A



- Name and organization
- **Verbal** comments and questions
  - You are muted by default; use the hand-raising feature if you'd like to be unmuted to speak verbally
  - To allow the PA to respond to each question, ask one question or make one comment at a time
- **Written** comments and questions
  - Use the chat box to write in your comment or question



# Session 2: Making the most of SOMAH's Technical Assistance Services



Zara Jamshed & Luis Amar & Staci Givens



## Session 2: Making the most of SOMAH's TA Services

# Session Overview

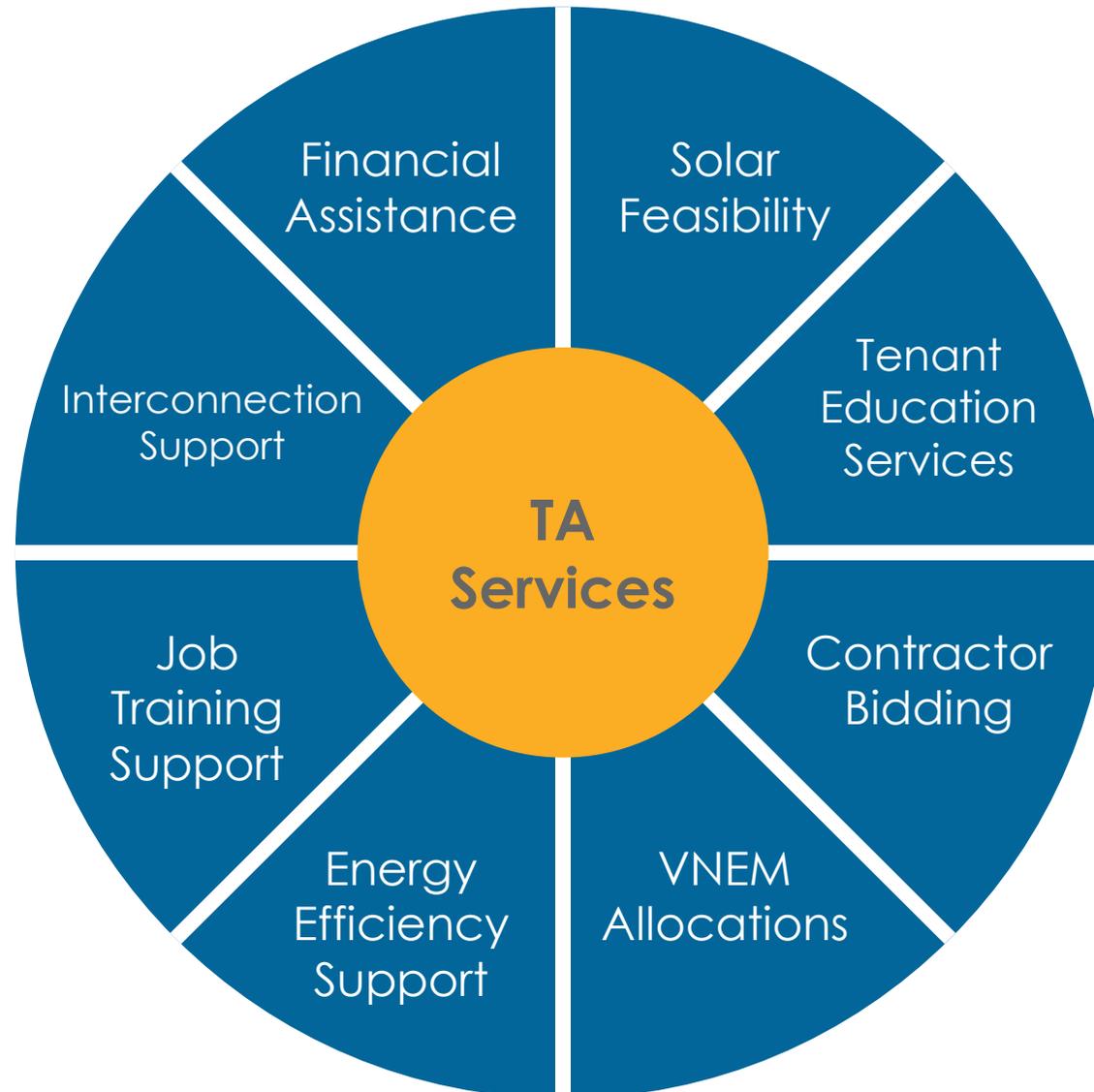
1. Intent of SOMAH TA
2. Suite of TA Services
3. Case Study
4. Resources
5. Discussion/Q&A

# Session 2: Making the most of SOMAH's TA Services

## Intent of SOMAH TA



# Session 2: Making the most of SOMAH's TA Services Suite of TA Services



# Session 2: Making the most of SOMAH's TA Services

## Suite of TA Services



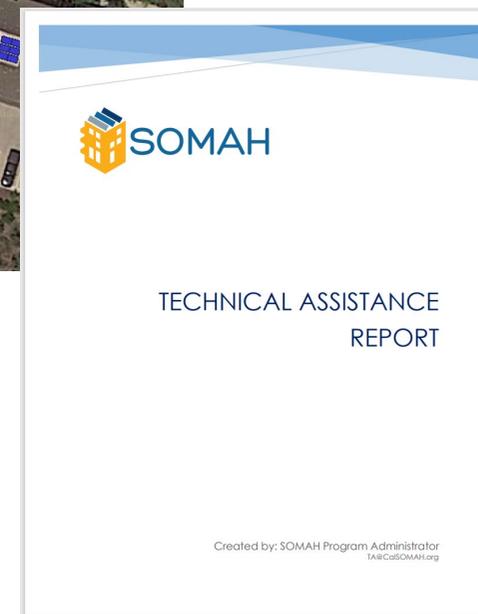
### Solar Feasibility

Is solar right for my property?

How much solar can fit on the roofs?

How much can SOMAH offer in incentives?

How much will I save on my energy bills?



# Session 2: Making the most of SOMAH's TA Services

## Suite of TA Services



### Solar Feasibility Lite

Preliminary System Design

PV System Sizing

Estimated Incentive Amount

Financial Analysis

# Session 2: Making the most of SOMAH's TA Services

## Suite of TA Services



### Financial Assistance

How much will a solar project cost?

How do I finance out of pocket costs?

What system ownership options are possible?

What is a solar loan?

# Session 2: Making the most of SOMAH's TA Services

## Suite of TA Services



### Energy Efficiency Support

What programs are available for energy efficiency upgrades?

How do I connect with other energy efficiency programs?

How do I meet the Energy Efficiency Compliance Milestone requirements?



# Session 2: Making the most of SOMAH's TA Services Suite of TA Services



## Contractor Bidding Support

Where do I find solar contractors?

How do I solicit bids from SOMAH eligible solar contractors?

How do I compare one project bid to another?

1 Input Request    2 Receive Bids    3 Choose a Service Provider

Have you applied for Upfront Technical Assistance (Track A)?  
 Yes  No

Property Name\*

Site Address Line 1\*

Line 2

City\*

State\*    Zip Code\*  
   

What is your relationship to the property?\*

Property Manager  
 Property Owner

Electric Utility\*

Number of Multifamily Buildings on Property\*

Total Number of Units\*

---

Solar on Multifamily Affordable Housing (SOMAH) Program

### Project Bid

The Solar on Multifamily Affordable Housing (SOMAH) Project Bid form allows customers to compare multiple bids using standard metrics. The customer should be aware and understand the information in the bid. The final contract may differ from this bid and will be reviewed in accordance with the incentive application process. Submission of the incentive application and Project Bid form does not guarantee incentive eligibility. **Note:** When responding to bid requests received through the online bidding platform, the SOMAH Project Bid Form should be filled out digitally using the form fields and submitted as a PDF file.

Bid Prepared By		
Solar contractor contact:	<input type="text"/>	
Solar contractor company:	<input type="text"/>	
Bid Prepared For		
Customer contact:	<input type="text"/>	
Customer company:	<input type="text"/>	
Section I – Contractor Information		
Company name:		
Company street address:		
Company city:	State:	ZIP code:
Contact person:		
Phone number:	Email:	
CSLB Credentials		
CSLB license #:	Years of active license:	
Has license or an affiliated license ever been suspended by CSLB?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Has contractor ever had a complaint filed about them at CSLB?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Has contractor ever had a complaint made to any CPUC-governed programs? (CSI, MASH, CSI Thermal, etc.)	<input type="checkbox"/> Yes <input type="checkbox"/> No	

# Session 2: Making the most of SOMAH's TA Services

## Suite of TA Services



Let us help you meet your job training requirements!

### For Contractors

Guidance with Posting  
Job Trainee Positions

Identifying and Recruiting  
Job Trainees

Guidance with the Job Training  
Requirements

Leveraging the Job Training Portal  
and Job Training Organizations

### For Property Owners

Connecting Tenants to Local Job  
Training Programs



# Session 2: Making the most of SOMAH's TA Services Suite of TA Services



Let us help you meet your tenant education requirements!

Tenant Education Services

Tenant Education "Train the Trainer"

Tenant Education 101 Meeting

Services are **free** for any project that has received a **Proof of Project Milestone approval**

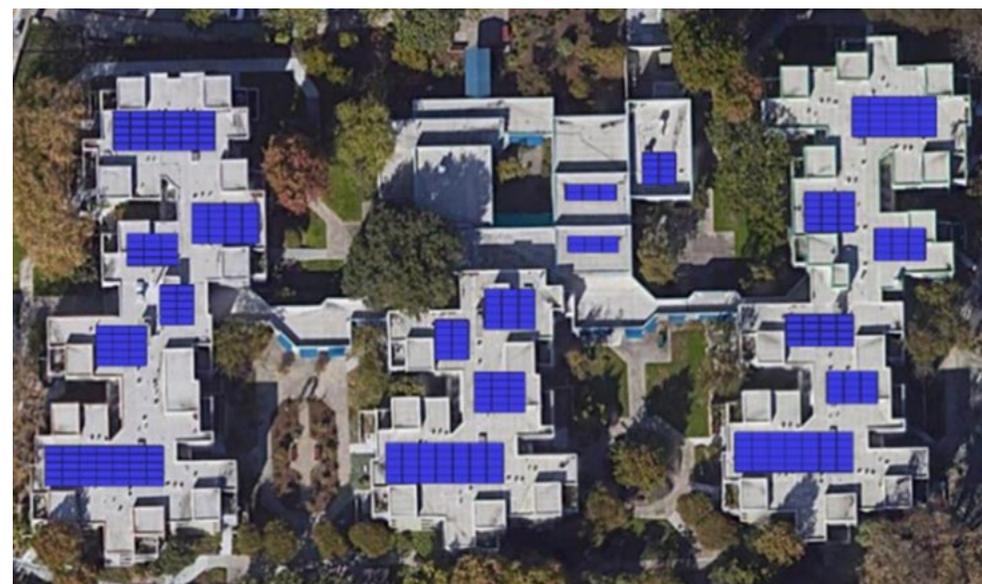


## Session 2: Making the most of SOMAH's TA Services

# Case Study



- Project location: Oakland, CA
- Year built: 1979
- Number of apartments: 100
- Occupancy type: Seniors
- Property characteristics:
  - 3 buildings, each with a unique shape
  - Flat roofs < 5 years old
  - Packaged dedicated outdoor air systems located on roofs
  - Square shaped pop-ups on rooftops

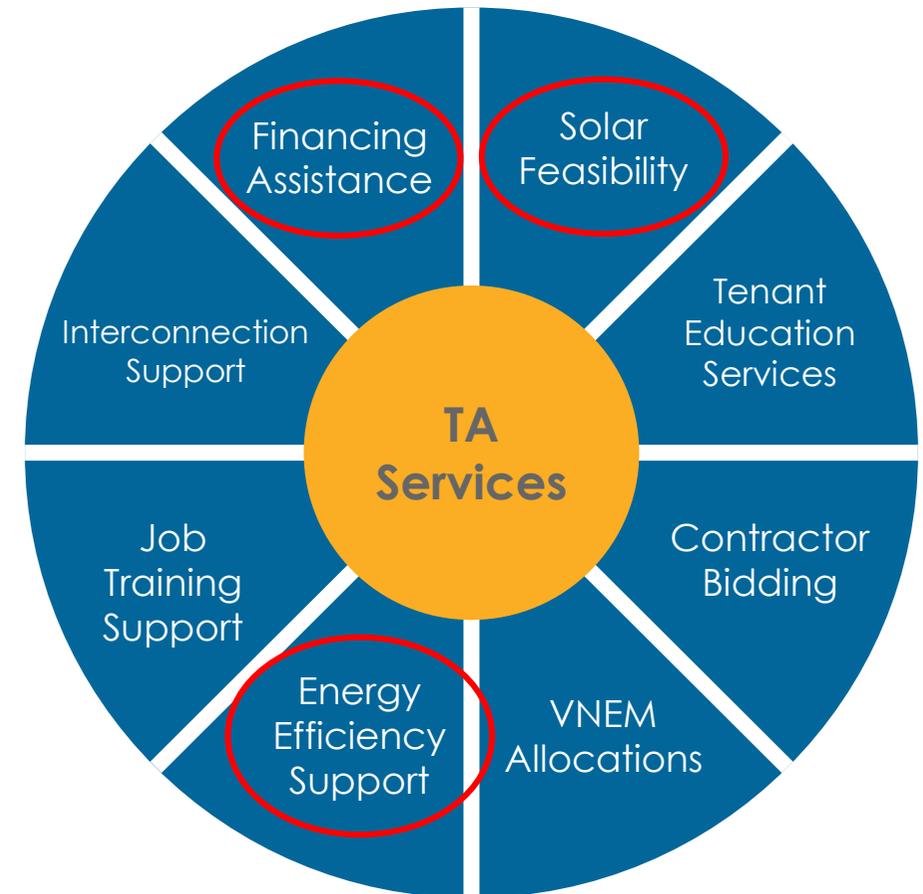


# Session 2: Making the most of SOMAH's TA Services

## Case Study



- Initial barriers:
  - How to start a solar project?
  - Are the roofs suitable for solar?
  - How will this project be paid for?
  - How much will I save?
- TA provided to overcome barriers:
  - Solar feasibility
  - Financing assistance
  - Energy efficiency support

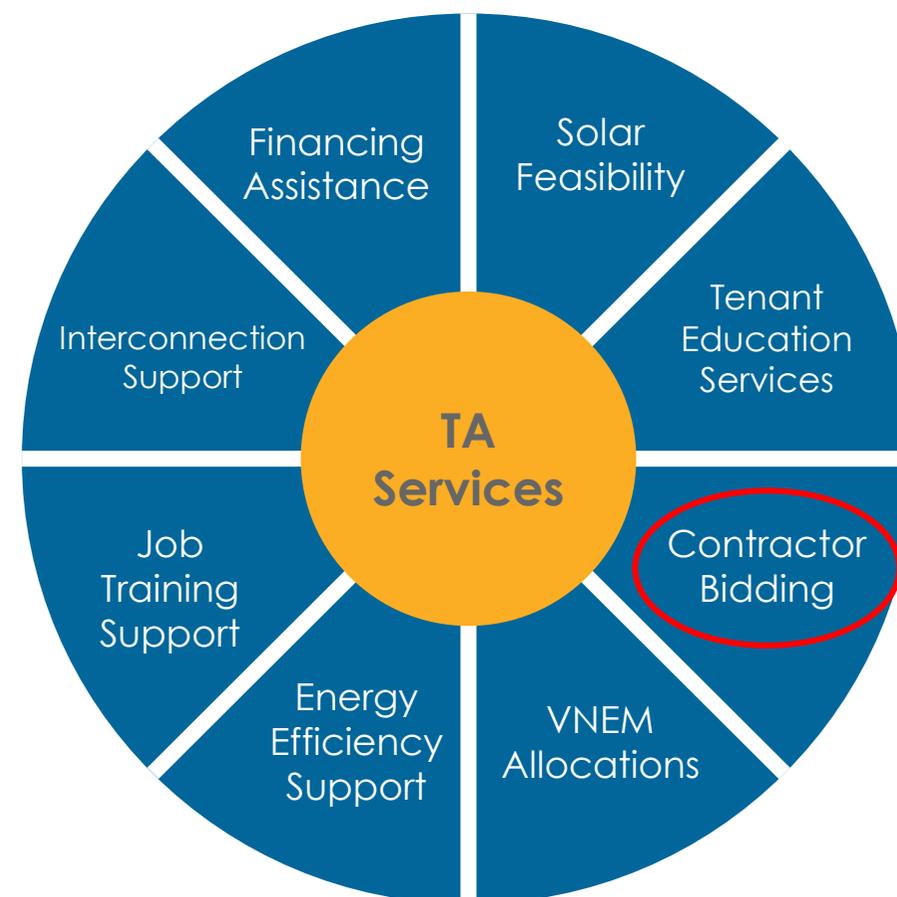


# Session 2: Making the most of SOMAH's TA Services

## Case Study



- Additional barriers:
  - How to find solar contractors?
  - What questions do I ask contractors who bid on the project?
  - What are the steps needed before construction?
- TA provided to overcome barriers:
  - Contractor bidding



## Session 2: Making the most of SOMAH's TA Services **Resources**



### You may be thinking...

- How do I get started?
- How do I reach out with questions?



Contact us at **[TechAssist@CalSOMAH.org](mailto:TechAssist@CalSOMAH.org)**

## Session 2: Making the most of SOMAH's TA Services

# Discussion/Q&A



- **Discussion Questions**

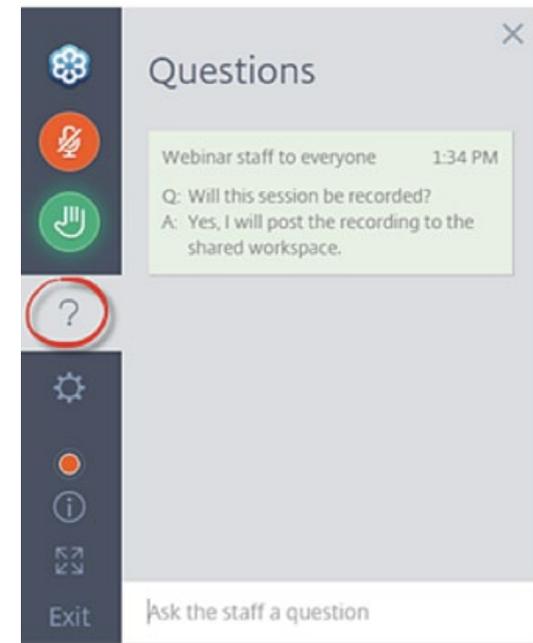
- What other support services would you need that are not currently available?
- What barriers are you finding when trying to go solar at your property?

## Session 2: Making the most of SOMAH's TA Services

# Discussion/Q&A



- Name and organization
- **Verbal** comments and questions
  - You are muted by default; use the hand-raising feature if you'd like to be unmuted to speak verbally
  - To allow the PA to respond to each question, ask one question or make one comment at a time
- **Written** comments and questions
  - Use the chat box to write in your comment or question



# Session 3: Upcoming Program (Handbook) Changes



Chris Walker



# Session 3: Upcoming Program (Handbook) Changes

## Session Overview



- Overview of upcoming Handbook Changes
  - Code of Conduct
  - CalEnviroscreen 3.0/4.0
  - Compliance with Job Training & Tenant Ed. Requirements
- Next steps
- Q&A



# Session 3: Upcoming Program (Handbook) Changes

## Program Handbook Updates & Refresher



### Overview

Version	Major Updates	Status
Handbook 1.0 (original)	-----	March 2019
Handbook 2.0	<ul style="list-style-type: none"><li>● SOMAH &amp; MASH Stacking</li></ul>	May 2020
Handbook 3.0	<ul style="list-style-type: none"><li>● Progress Payments</li></ul>	December 2020
Handbook 4.0	<ul style="list-style-type: none"><li>● Application Pipeline Management (Lottery)</li><li>● Required Notification for Early Job Trainee Termination</li><li>● System Changes Affecting Incentive Amounts</li><li>● Assorted minor updates</li></ul>	May 2021

# Session 3: Upcoming Program (Handbook) Changes

## Program Handbook Updates & Refresher



### Overview

Version	Major Updates	Status
Handbook 1.0 (original)	-----	March 2019
Handbook 2.0	<ul style="list-style-type: none"> <li>SOMAH &amp; MASH Stacking</li> </ul>	May 2020
Handbook 3.0	<ul style="list-style-type: none"> <li>Progress Payments</li> </ul>	December 2020
Handbook 4.0	<ul style="list-style-type: none"> <li>Application Pipeline Management (Lottery)</li> <li>Required Notification for Early Job Trainee Termination</li> <li>System Changes Affecting Incentive Amounts</li> <li>Assorted minor updates</li> </ul>	May 2021
<b>Handbook 5.0</b>	<ul style="list-style-type: none"> <li>SOMAH Participant Code of Conduct</li> <li>CES 3.0 and 4.0</li> <li>Compliance with job training &amp; tenant education requirements</li> </ul>	In development

# Session 3: Program Changes

## Program Handbook Substantive Changes



### Participant Code of Conduct

- **What:** Sets min. standards of conduct; provides grounds for recourse if breached
- **How:** Modeled on IOU Supplier Codes of Conduct; appended to SOMAH Handbook
- **Why:** Job trainee complaints; to ensure safety and that SOMAH's equity intent is upheld across the program
- **When:** Filing in Q4 2021; goes into effect upon approval



## Participant Code of Conduct: Enforceable Sections

- Based on existing laws, regulations, and program requirements
- Sections
  - Worksite safety
  - Employment and labor protections
  - Consumer protection and ethical communication
  - Data security and privacy

## Participant Code of Conduct: Enforcement approach

- **Triggers:** Objective rather than merit-based determinations
  - Pattern of complaints to the SOMAH PA
  - Findings, actions by empowered agencies
    - Cal/OSHA
    - California Department of Fair Employment and Housing
    - California Department of Industrial Relations
    - California State Licensing Board
- **Penalties:** Tied to existing system of infractions, failures, removal and based on severity as determined by the SOMAH PA team

## Participant Code of Conduct: Stakeholder engagement

- SOMAH Advisory Council
- SOMAH CBO Partners
- SOMAH Job Training Organization Task Force
- Inside and outside legal counsel
- CPUC Energy Division

## Stakeholder engagement takeaways

- The integrity of the program demands we take a **zero tolerance** approach to unsafe work practices, discrimination, and harassment.
- As a historic equity program that's emerging as a national model, SOMAH must hold all participants to a **high standard of conduct**.
- All participants should contribute to **a safe community of practice** in which everyone's rights are respected
- We work collectively to **create and embody best practices** while expanding solar access to California's MFAH communities.

## CalEnviroScreen Versioning

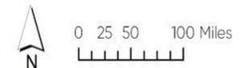
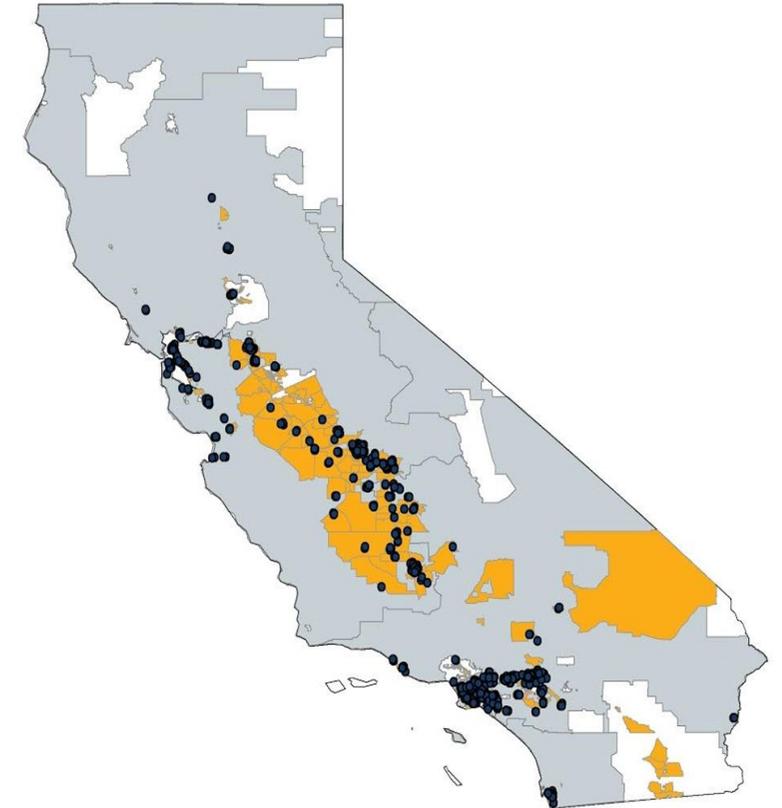
- **What:** Clarifies program eligibility requirements as they relate new versions of CES (4.0 is forthcoming in Summer 2021)
- **How:** Upholds eligibility for both the current and the immediately previous version of CES
- **Why:** Outreach is ongoing to CES 3.0-eligible communities; expands rather than shrinks eligible properties
- **When:** Filing in Q4 2021; goes into effect upon approval

# Session 3: Program Changes

## Program Handbook Substantive Changes



- SOMAH Handbook:
  - “The current version of the CalEnviroScreen is version 3.0. If CalEPA updates their definition or the CalEnviroScreen version, a Handbook update will commence to clarify qualification.”
- CES 3.0 → CES 4.0: “Summer 2021”
  - One new indicator for Children’s Lead Risk from Housing
  - Changes to how some indicators are calculated
  - All indicators contain most recent data
  - **Approx. 185 newly eligible properties\***



## Compliance with Job Training & Tenant Ed. Requirements

- **What:** Clarifies that the PA may issue infractions, failures, etc., for noncompliance with job training and tenant education requirements
- **How:** Expanding existing system of infractions, failures, etc.
- **Why:** To encourage compliance with job training & tenant education requirements; provide further options for enforcement, beyond denial of incentive payment
- **When:** Filing in Q4 2021; goes into effect upon approval

## Session 3: Program Changes

# Program Handbook Next Steps

- Stakeholder review & feedback process: **most of 2021**
- PA produces updated Handbook draft w/redlines: **Q4 2021**
- Handbook stakeholder feedback process (Advisory Council, JTO Task Force, CPUC, CBOs, Public Forums): **Q3 - Q4 2021**
- PA files draft Handbook w/redlines + Advice Letter: **Q4 2021 - Q1 2022**
- Public comments/protests: **Q1 2022**

## Session 3: Program Changes

# Looking ahead: Program Evaluation

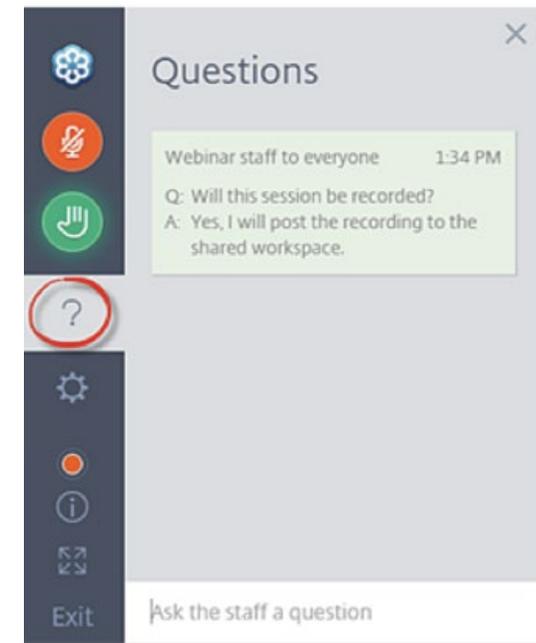
- The PA anticipates that the forthcoming 3rd party program **evaluation report will recommend further changes** to program requirements and processes to strengthen the program
- The PA is committed to continuing its **robust stakeholder engagement** process ahead of further proposed changes
- The evaluator, Verdant, will host a **webinar on September 17** -- we encourage participants to attend and share any initial feedback and ask questions

### SOMAH Third-Party Evaluation [Phase II Results] Public Webinar

- <https://bit.ly/38phM9o>
- Event number: 146 888 5652
- Event password: rA29 (7229 from phones)

## Session 3: Q&A

- Name and organization
- **Verbal** comments and questions
  - You are muted by default; use the hand-raising feature if you'd like to be unmuted to speak verbally
  - To allow the PA to respond to each question, ask one question or make one comment at a time
- **Written** comments and questions
  - Use the chat box to write in your comment or question



# Wrap Up & Next Steps

Mai Fang



# Wrap Up & Next Steps

## What's Next?

### 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](mailto:contact@CalSOMAH.org)



# Wrap Up & Next Steps

## Ribbon Cutting Ceremony

### SOMAH is a Team Effort

Celebrate your project's completion with a ribbon-cutting ceremony or other event to:

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

We can help with the planning

Contact: [media@calsomah.org](mailto:media@calsomah.org)



## Session 1: SOMAH Program Update

# Upcoming Events

- **Tuesday, September 14, 10am-12pm:** Applicant and Contractor Eligibility Training
- **Friday, September 17, 10-11:30am:** Third-Party Evaluation Public Webinar [Phase II Results]  
<https://bit.ly/38phM9o>  
Event number: 146 888 5652  
Event password: rA29 (7229 from phones)
- **Thursday, September 23, 1-2pm:** San Joaquin Valley Affordable Housing Summit: Preparing for Growth in the Valley - How Grid Resiliency Creates a Secure and Sustainable Future (Panelist)
- **Tuesday, September 21, 10-11am:** Job Training Webinar for Contractors
- **Tuesday, October 12, 12 - 1 pm:** Tenant Education Webinar
- **November (date TBD):** “Know Your Rights” Workshop for Job Trainees
- **November (date TBD):** Fair Chance Hiring Workshop for Contractors

Register at [calsomah.org/events](https://calsomah.org/events)

## Looking Ahead & Next Steps

### What's Next?

- Forum will be recorded, but will not be made publicly available
- This slide deck will be emailed and posted to CalSOMAH.org next week
- Notes will be compiled and edited for release within five (5) business days (by 9/8/21)
- Q4 Forum scheduled for 11/3/21 with more information to come



# Questions & Feedback



*Email: [contact@CalSOMAH.org](mailto:contact@CalSOMAH.org)*

*Web form: [CalSOMAH.org/contact-us](https://CalSOMAH.org/contact-us)*

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

*Tenant hotline: 800-843-9728*



HOUSING

Thank you!

