## Welcome & Introductions

**Agenda Overview**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:00-1:10</td>
<td>Welcome &amp; Introductions</td>
</tr>
<tr>
<td>1:10-1:30</td>
<td>Session 1: Program Update &amp; Announcements</td>
</tr>
<tr>
<td></td>
<td>- Key program stats &amp; updates</td>
</tr>
<tr>
<td></td>
<td>- Contractors State License Board (CSLB) Announcement</td>
</tr>
<tr>
<td></td>
<td>- Q&amp;A/Discussion</td>
</tr>
<tr>
<td>1:30-2:10</td>
<td>Session 2: Making the most of SOMAH’s Technical Assistance Services</td>
</tr>
<tr>
<td></td>
<td>- Overview of SOMAH’s technical assistance (TA) offerings</td>
</tr>
<tr>
<td></td>
<td>- TA case-study walk-through</td>
</tr>
<tr>
<td></td>
<td>- Review of SOMAH’s other services</td>
</tr>
<tr>
<td></td>
<td>- Q&amp;A/Discussion</td>
</tr>
<tr>
<td>2:10-2:20</td>
<td>Break</td>
</tr>
<tr>
<td>2:20-3:00</td>
<td>Session 3: Upcoming Program (Handbook) Changes</td>
</tr>
<tr>
<td></td>
<td>- Preview of upcoming program changes and high-level timeline</td>
</tr>
<tr>
<td></td>
<td>- Q&amp;A/Discussion</td>
</tr>
<tr>
<td>3:00-3:05</td>
<td>Looking Ahead &amp; Next Steps</td>
</tr>
</tbody>
</table>
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
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 (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

### Application Breakdown

<table>
<thead>
<tr>
<th>Utility Territory</th>
<th># of Active Applications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pacific Gas &amp; Electric</td>
<td>200</td>
</tr>
<tr>
<td>Southern California Edison</td>
<td>117</td>
</tr>
<tr>
<td>San Diego Gas &amp; Electric</td>
<td>51</td>
</tr>
<tr>
<td>PacifiCorp</td>
<td>1</td>
</tr>
<tr>
<td>Liberty Utilities</td>
<td>2</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>371</strong></td>
</tr>
</tbody>
</table>
All territories are open to new applications with no waitlists

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

- Why Technical Assistance?
  - Equal Access to SOMAH Benefits
  - Education and Access to Resources
  - Overcome Challenging Barriers
  - Program, Technical, and Financial Support
Session 2: Making the most of SOMAH’s TA Services

Suite of TA Services

- Financial Assistance
- Solar Feasibility
- Interconnection Support
- Tenant Education Services
- Job Training Support
- Contractor Bidding
- Energy Efficiency Support
- VNEM Allocations
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?
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
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**

<table>
<thead>
<tr>
<th>Version</th>
<th>Major Updates</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Handbook 1.0 (original)</td>
<td>------</td>
<td>March 2019</td>
</tr>
<tr>
<td>Handbook 2.0</td>
<td>● SOMAH &amp; MASH Stacking</td>
<td>May 2020</td>
</tr>
<tr>
<td>Handbook 3.0</td>
<td>● Progress Payments</td>
<td>December 2020</td>
</tr>
<tr>
<td>Handbook 4.0</td>
<td>● Application Pipeline Management (Lottery)</td>
<td>May 2021</td>
</tr>
<tr>
<td></td>
<td>● Required Notification for Early Job Trainee Termination</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● System Changes Affecting Incentive Amounts</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Assorted minor updates</td>
<td></td>
</tr>
</tbody>
</table>
Session 3: Upcoming Program (Handbook) Changes
Program Handbook Updates & Refresher

Overview

<table>
<thead>
<tr>
<th>Version</th>
<th>Major Updates</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Handbook 1.0  (original)</td>
<td></td>
<td>March 2019</td>
</tr>
<tr>
<td>Handbook 2.0</td>
<td>● SOMAH &amp; MASH Stacking</td>
<td>May 2020</td>
</tr>
<tr>
<td>Handbook 3.0</td>
<td>● Progress Payments</td>
<td>December 2020</td>
</tr>
<tr>
<td>Handbook 4.0</td>
<td>● Application Pipeline Management (Lottery)</td>
<td>May 2021</td>
</tr>
<tr>
<td></td>
<td>● Required Notification for Early Job Trainee Termination</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● System Changes Affecting Incentive Amounts</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Assorted minor updates</td>
<td></td>
</tr>
<tr>
<td>Handbook 5.0</td>
<td>● SOMAH Participant Code of Conduct</td>
<td>In development</td>
</tr>
<tr>
<td></td>
<td>● CES 3.0 and 4.0</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Compliance with job training &amp; tenant education requirements</td>
<td></td>
</tr>
</tbody>
</table>
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
- 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

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
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
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]
  
  
  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](http://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

Web form: CalSOMAH.org/contact-us

General hotline: 858-244-1177 ext. 5

Tenant hotline: 800-843-9728
Thank you!