General Housekeeping
Remote Attendee Participation
Session 1: Welcome & Introductions

Chris Walker
Session 1: Welcome & Introductions

Purpose

- Share program updates
- Provide space for attendees to ask questions, share concerns and provide feedback
- Occur quarterly and will rotate locations throughout California
Session 1: Welcome & Introductions
Agenda overview

1:00 - 1:20  Session 1: Welcome & Introductions
1:20 - 2:20  Session 2: Program Overview & Updates
2:20 - 2:35  [Break]
2:35 - 3:25  Session 3: Application Waitlist Update & Discussion
3:25 - 4:20  Session 4: Opening Listening Session
4:20 - 4:30  Session 5: Wrap-up & Thank you
Session 1: Welcome & Introductions

Meeting Guidelines

● Speaking instructions reminder:
  • All webinar attendees will be muted throughout forum
  • In-person — please wait for staff to hand you a microphone
  • Webinar — use the chat feature to write in questions or attendees use the hand raising feature
● Forum will be recorded, but will not be made publicly available
● Meeting notes, and slides will be posted to CalSOMAH.org
● Opportunity to listen, and make improvements to program in future based on feedback
● Additional questions and comments: contact@CalSOMAH.org (858-244-1177, ext. 5)
Session 1: Welcome & Introductions
SOMAH Program Administrator Team

Jae Berg | SOMAH Program Manager
Sarah Hill | SOMAH Program Manager
Chris Walker | SOMAH Program Manager
Hannah Warner | SOMAH Program Manager
Nick Dirr | SOMAH Program Manager
Vallerie Gonzalez | SOMAH Program Manager
Marisa Villarreal | SOMAH Program Manager
Alexandra Patey | SOMAH Program Manager
Karinna Gonzalez | Outreach Coordinator
Staci Hoell | Workforce Development Manager
Sarah Salem | Tenant Services & CBO Manager

Luis Amar | Technical Assistance Analyst
David Lee-Burleigh | Technical Assistance Coordinator
Zara Jamshed | Technical Assistance Coordinator
Michael Claproth | Sustainable Housing Program Associate, California Housing Partnership
Blanca de la Cruz | Sustainable Housing Program Director, CA Housing Partnership
Srinidhi Sampath Kumar | Sustainable Housing Program Manager, CA Housing Partnership
Session 2: Program Overview & Updates

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
Program Summary

- **Focus on tenant benefit**
  - At least 51% of the energy produced by the PV system must be allocated to tenants
  - Tenants must receive 100% of the economic benefit of the solar credits
  - Rents or utility allowances are not allowed to be adjusted based on the solar credits

- **Technical assistance**
  - Provide TA to property owner and contractors at no cost

- **Community-based approach**
  - Contracted with 4 Community-Based Organizations

- **Energy efficiency**
  - Encourage EE by capping the incentive

- **Workforce development**
  - Encourage local and targeted hiring
# Session 2: Program Overview & Updates

## Program Launch - Day 1

<table>
<thead>
<tr>
<th>Utility Territory</th>
<th># of Applications Received</th>
<th># of MW</th>
<th>Requested Funding ($)</th>
<th>Total Incentive Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pacific Gas &amp; Electric</td>
<td>98</td>
<td>29.89 MW</td>
<td>$66,170,677</td>
<td>$45,430,101</td>
</tr>
<tr>
<td>Southern California Edison</td>
<td>84</td>
<td>26.16 MW</td>
<td>$55,793,631</td>
<td>$42,482,704</td>
</tr>
<tr>
<td>San Diego Gas &amp; Electric</td>
<td>44</td>
<td>14.19 MW</td>
<td>$30,961,988</td>
<td>$9,270,000</td>
</tr>
<tr>
<td>PacifiCorp</td>
<td>0</td>
<td>0 MW</td>
<td>$0</td>
<td>$1,743,854</td>
</tr>
<tr>
<td>Liberty Utilities</td>
<td>0</td>
<td>0 MW</td>
<td>$0</td>
<td>$390,768</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>226</strong></td>
<td><strong>70.23 MW</strong></td>
<td><strong>$152,926,296</strong></td>
<td><strong>$99,317,427</strong></td>
</tr>
</tbody>
</table>
Session 2: Program Overview & Updates

Current Application Statistics

- 117 active applications
  - With more than 11,000 tenant units
- 136 applications on the waitlist
  - With nearly 10,000 tenant units
- 7 participating contractors
  - With over 150 eligible contracting companies
- 92.5% of solar credits allocated to tenants
  - 7.5% allocated to the common areas
- Average system size of 292 kW
  - MASH comparison - average size 77 kW
- 6 Track A applications (waitlist)
  - Applications that opt-in to technical assistance
## Current Application Statistics

<table>
<thead>
<tr>
<th>Utility Territory</th>
<th># of Active Applications</th>
<th># of Waitlist Applications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pacific Gas &amp; Electric</td>
<td>53</td>
<td>59</td>
</tr>
<tr>
<td>Southern California Edison</td>
<td>52</td>
<td>41</td>
</tr>
<tr>
<td>San Diego Gas &amp; Electric</td>
<td>12</td>
<td>36</td>
</tr>
<tr>
<td>PacifiCorp</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Liberty Utilities</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>117</strong></td>
<td><strong>136</strong></td>
</tr>
</tbody>
</table>

All active applications are at the Reservation Request Milestone.
Session 2: Program Overview & Updates

Current Waitlist

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

- Waitlist discussion to follow

<table>
<thead>
<tr>
<th>Utility</th>
<th>Status</th>
<th>Estimated Wait</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liberty Utilities Company</td>
<td>Open to applications</td>
<td>none</td>
</tr>
<tr>
<td>PacifiCorp</td>
<td>Open to applications</td>
<td>none</td>
</tr>
<tr>
<td>PG&amp;E</td>
<td>Open to waitlist</td>
<td>~6 months</td>
</tr>
<tr>
<td>SCE</td>
<td>Open to waitlist</td>
<td>~6 months</td>
</tr>
<tr>
<td>SDG&amp;E</td>
<td>Closed to new applications</td>
<td>~2 years</td>
</tr>
</tbody>
</table>
Session 2: Program Overview & Updates

Engagement Highlights

● SOMAH Program Handbook
  • July 2018: Public workshop and commenting

● Annual Marketing, Education, and Outreach Plans
  • 2019 Plan: June/July 2019
  • 2020 Plan: Dec 2019/Jan 2020 (expected)
Session 2: Program Overview & Updates

Engagement Highlights

● Contractor Webinars
  • Eligibility training - 5 webinars
    • Monthly, with next one on Nov 7
  • Solar sizing tool - 1 webinar

● Property Owner Webinars
  • Intro to SOMAH for property owners
  • Bidding tool resources
  • Solar sizing tool
Session 2: Program Overview & Updates

Engagement Highlights

● Advisory Council
  • May 2019 selection of members
  • Q2 2019 meeting - Jarupa Valley, CA
  • Q3 2019 meeting - Compton, CA
  • Q4 2019 meeting - Oakland, CA

● Workforce development
  • Partnership with Rising Sun Center for Opportunity
  • Job Training Task Force kickoff in Nov 2019
  • 2 JTO webinars and 4 solar job fairs to-date

● CBOs
  • Rotating partnership model
  • Current partnerships - APEN, CBE, CEJA, EHC
  • Kick off meeting held in August
  • Outreach in multiple languages
Session 2: Program Overview & Updates

Resources - Program Website

- **CalSOMAH.org**
  - Full website launched in June 2019
- Focused user experiences
  - Property owners, contractors, tenants, and job seekers
- Application resources
  - HTML handbook
- Eligibility requirements
- Education & resources
- Spanish and Chinese translations
Session 2: Program Overview & Updates

Additional Website Resources

● General
  • Energy auditors database
  • Tenant engagement toolkit
  • Eligible SOMAH properties map
  • Virtual net energy metering toolkit
  • Understanding solar energy systems
  • Understanding your bill after solar
  • Event listings

● Application
  • PowerClerk status flow chart
  • Document checklist
  • Application guide
Session 2: Program Overview & Updates

Additional Online Resources

- **Bidding Tool**
  - Electronic bid solicitation
  - Apples to apples comparison for customers
  - Standard bid template utilized
  - Eligible contractors invited to join

- **California Distributed Generation Statistics**
  - Updated weekly
  - Incentive budget report
  - Working data set

- **Job Training Portal**
  - Job board for contractors seeking eligible trainees
  - Directory of 59 eligible job training organizations
  - 100+ job trainees ready to help install SOMAH projects
Session 2: Program Overview & Updates

Resources - Points of Contact

- General inbox
  - contact@calsomah.org
- SOMAH program hotline
  - 858-244-1177, ext. 5
- Contact form on website
  - Inquiries directed to area of interest
- Email sign-up for program updates
- Tenant hotline
  - 800-843-9728
- Individual application assignees
Break

Reconvene at 2:35pm
Session 3: Application Waitlist Update & Discussion

Jae Berg, Sarah Hill
Session 3: Application Waitlist Update

Application Waitlist Goals

• Level the playing field between all program participants

• Provide a pathway for access to underserved or urgent need communities
Session 3: Application Waitlist Update

 Strategies for Achieving Waitlist Goals

• Lottery System
  • Triggered when applications exceed 120% of annual budget in each IOU territory

• Equity Mechanism for Priority Groups
  • Priority 1
  • Priority 2
Session 3: Application Waitlist Update

Proposed Waitlist Updates

Lottery is triggered

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

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

Lottery only includes Track B apps. Track A are first come-first serve; then Track A and Track B are sorted every other one on the waitlist.
Session 3: Application Waitlist Update
Proposed Waitlist Updates

Lottery is triggered, cont.

- Project order is announced and posted on the website
- PowerClerk opens back up for Track A applications
- Track A budget threshold is met
- Track B remains closed until next funding period
- Track A budget threshold is equal to 200% of the annual budget

PowerClerk is closed for Track A applications
Lottery is not triggered

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

Lottery is triggered when applications exceed 120% of the annual budget
Session 3: Application Waitlist Update

Proposed Waitlist Updates

Lottery is not triggered, cont.

- Applications are processed first come first served in the order they were submitted.
- Track B budget threshold is met; PowerClerk is closed for Track B applications.
- Track A budget threshold is met; PowerClerk is closed for Track A applications.
- PowerClerk is closed until the next funding cycle.

Track A and Track B treated equally.

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

Track A budget threshold is equal to 200% of the annual budget.
Session 4: Listening Session
Session 4: Listening Session

Purpose

- To create a space to ask questions, share concerns and provide feedback
- Hear what is working well, and challenges/barriers that you are facing
- Will help PA Team to better understand what’s working and what isn’t and make potential program improvements in the future
Session 4: Listening Session

Session Guidelines

- In-person: please wait for a microphone before speaking so that webinar attendees can hear
- Webinar: use the chat feature to write in questions or use the hand raising feature to ask your question verbally. Once the hand raising feature has been activated, we will unmute the person to allow them to ask their question.
Session 4: Listening Session
Session Guidelines cont.

- Questions will be answered one at a time
- Allow space for others to ask questions (be mindful of time)
- Respect people’s ideas and opinions
Session 4: Listening Session

What’s working well?

What are some barriers or challenges you’ve encountered?

What has been confusing?
Session 5: Wrap-Up & Thank You

- Meeting notes and slides will be posted to CalSOMAH.org
- Watch for follow-up email which will contain the presentation slides and links to handouts
- Public forums are quarterly: Next forum will focus on job training organizations, job trainees, and tenants
  - (Feb 2020, location TBD)
- Sign up for email list on CalSOMAH.org for program updates
Thank you!

Email: contact@CalSOMAH.org

Web form: CalSOMAH.org/contact-us

General hotline: 858-244-1177 ext. 5

Tenant hotline: 800-843-9728
Thank You

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