<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:00 - 1:05</td>
<td>Welcome &amp; Introductions</td>
<td></td>
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</tbody>
</table>
| 1:05 - 1:50 | Session 1: Program Update | Key program stats & updates  
Interactive Eligible Properties Map preview  
COVID impacts review  
Q&A/Discussion                                                                 |
| 1:50 - 2:20 | Session 2: Program Changes | Overview of Program Handbook changes & what’s on the horizon  
Q&A/Discussion                                                                 |
| 2:20 - 2:25 | Looking Ahead & Next Steps |                                                                                   |
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. To learn more about how to support Asian American Communities visit Chinese for Affirmative Action to understand their three demands for action from local leaders.
Honoring Pride Month

- Pride commemorates the anniversary of the Stonewall Riots, led by Black and Latinx trans women and gender non-conforming individuals against police brutality, and igniting a movement for LGBTQIA+ rights and liberation.
- The struggles for Queer liberation and climate justice are connected.
- Queer wisdom, knowledge, and power are critical to fighting and surviving the climate crisis.
- We encourage everyone to honor and celebrate LGBTQIA+ colleagues, friends, family-members communities, and allies this month and all year.

Image: A mural of Marsha P. Johnson and Sylvia Rivera, leaders in the LGBTQ liberation movement. Artist: Brian Kenny. Photo: Jerome Larez/Arttitude
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
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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 (by 6/9/21)
- 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
Victoria Leslie | SOMAH Program Rebate Processing Specialist

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

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
Margee McDonnell | SOMAH ME&O Coordinator
Omar Rocha | SOMAH ME&O Coordinator
Lucy Moua | 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

Kajsa Hendrickson & Sarah Hill
# 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>221</td>
</tr>
<tr>
<td>Southern California Edison</td>
<td>120</td>
</tr>
<tr>
<td>San Diego Gas &amp; Electric</td>
<td>57</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>401</strong></td>
</tr>
</tbody>
</table>
Session 1: SOMAH Program Update

Where We Are Today

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>~$948,000</td>
<td>Funds available today</td>
</tr>
<tr>
<td>PacifiCorp</td>
<td>~$3,806,000</td>
<td>Funds available today</td>
</tr>
<tr>
<td>PG&amp;E</td>
<td>~$80,135,000</td>
<td>Funds available today</td>
</tr>
<tr>
<td>SCE</td>
<td>~$153,799,000</td>
<td>Funds available today</td>
</tr>
<tr>
<td>SDG&amp;E</td>
<td>~$28,186,000</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 ~87% 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 **32,646** tenant units
- Average system size: **168 kW**
- 10 participating contractors
  - Many more subcontractors expected
- Pipeline supports nearly **760** job training opportunities
  - **52,000** projected training hours
  - **$1m+** in projected wages
  - Leveraging nearly **100** job training organization relationships
Session 1: SOMAH Program Update
Eligible Properties Map Preview

- Potential properties & current applications
- Tabs
  - Disadvantaged communities (DAC)*
  - Utility territory
  - Legislative districts
  - Climate zones
- Advanced filters

https://calsomah.org/eligible-somah-properties-map
Session 1: SOMAH Program Update
Eligible Properties Map: Demonstration

Property Locations and Disadvantaged Communities

Affordable Housing Units by Disadvantaged Community

- Top 5% (Most Disadvantaged): 17,078
- 75-95% (Disadvantaged): 72,499
- Bottom 25% (Least): 175,353

This chart shows the number of affordable housing units by disadvantaged community status.

Percent of Total Based on Filter Criteria:
- 66.19%
- 27.37%

Affordable Housing Units by Street Address

<table>
<thead>
<tr>
<th>Street Address</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Ave., Oakland, 94606</td>
<td>55</td>
</tr>
<tr>
<td>1st St., Lincoln, 95648</td>
<td>49</td>
</tr>
<tr>
<td>2nd St., Downey, 90241</td>
<td>43</td>
</tr>
<tr>
<td>2nd St., Santa Monica, 90401</td>
<td>74</td>
</tr>
<tr>
<td>3rd Ave., Chula Vista, 91910</td>
<td>127</td>
</tr>
<tr>
<td>3rd Ave., San Diego, 92101</td>
<td>194</td>
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<tr>
<td>3rd Ave., Walnut Creek, 94597</td>
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</tr>
<tr>
<td>3rd St., Biola, 93608</td>
<td>51</td>
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<tr>
<td>3rd St., Richmond, 94801</td>
<td>72</td>
</tr>
<tr>
<td>3rd St., Santa Monica, 90403</td>
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</tr>
<tr>
<td>3rd St., Alhambra, 91801</td>
<td>29</td>
</tr>
<tr>
<td>3rd St., Downey, 90241</td>
<td>24</td>
</tr>
<tr>
<td>3rd St., Laguna Beach, 92651</td>
<td>69</td>
</tr>
</tbody>
</table>
Session 1: SOMAH Program Update

Eligible Properties Map FAQs

● What are the factors that determine "likely eligible" on the filter?
  → Deed restricted DAC or low-income and 5+ units

● How often is it refreshed?
  → Quarterly, map will reflect most recent data

● What data is included?
  → Available statewide data - no personally identifiable information

● What are the active projects?
  → Projects approved by SOMAH PA
Session 1: SOMAH Program Update

Eligible Properties Map: What’s Next

- County search option
- Congressional overlay
- Total property count based on filters
- % of active applications based on filters
Session 1: SOMAH Program Update
Job Training: Resources & Expectations

Jobsite safety:

- Contractors should ensure a safe and harassment-free workplace for job trainees and tenants.
- Recent job trainee feedback has highlighted the importance of working with our contractors and all program participants to prioritize safety and inclusivity.
Session 1: SOMAH Program Update
Job Training: Resources & Expectations

Jobsite safety:
• Exploring new resources and trainings in 2021, potentially...
  • Code of conduct for all participants
  • “Know Your Rights” training for trainees
  • Online safety training for job trainees
  • Comprehensive solar jobsite safety guide
  • Trainee feedback collection including surveys, reporting
Session 1: SOMAH Program Update
Job Training: Resources & Expectations

Have an upcoming SOMAH project?
The SOMAH Workforce Development team can support you with:

• For Contractors:
  • Identifying and recruiting eligible job trainees
  • Guiding you through the SOMAH job training requirements
  • Leveraging the SOMAH Job Training Portal resume bank to grow your team

• For Property owners:
  • Connecting your tenants to local job training programs and solar career resources

Email workforce@CalSOMAH.org
Session 1: SOMAH Program Update

Job Training: Events

Job trainee events:
• Negotiation Workshop - July (date TBD)

Contractor events:
• Job Training Webinar for Contractors - July 20
Tenant Education

Tenant Education Services:

• **Personalized** tenant education workshop

• **Support** from the SOMAH PA and your local CBO partner

• **Free** service for any project that has received a Proof of Project Milestone approval

Apply now at: bit.ly/TE-Services-Pilot

Tenant Education Webinar:

• Q2: Tuesday, June 22
  11 a.m. - 12 p.m.
Quick Poll
Incentive Step-down Update

- Incentive step-down takes place annually on July 1
- Use NREL report to determine % of incentive step down
  - No NREL report to date
  - Have requested extension from CPUC, which has been granted
  - Extension of 120 days from July 1 (October 29, 2021)
- PA Team is committed to providing enough time and stakeholder engagement around the step down. Want to make sure it is not rushed (and make sure voices are heard)
Q1 covid impact survey key results:

- Impact of COVID-19 pandemic on SOMAH project installations
  - 74.6% indicated COVID-19 impacted their operations
  - 61.5% indicated that their operations were slowed significantly by COVID-19

- Top areas of installation impacted:
  - Staff capacity constraints - 90%
  - Reduced cash flow - 90%
  - Permitting delays - 54%
Q1 covid impact survey key results (continued):

• Top areas of application impacted:
  • Completing on-site energy efficiency audit - 72.7%
  • Completing general application requirements - 63.6%
  • Obtaining a permit or sign off by authority having jurisdiction (AHJ) - 45.5%
  • Hiring job trainee(s) - 45.5%
Energy Efficiency Compliance Milestone Update

● 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
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: Program Changes

Chris Walker & Jae Berg
Session 2: Program Changes

Session Overview

1. Handbook 4.0 refresher
   a. Substantive changes
   b. Minor revisions

1. Program Changes: On the Horizon
## Session 2: Program Changes
### Program Handbook Updates & Refresher

### Overview

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<td>Handbook 1.0</td>
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<td>March 2019</td>
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<td>(original)</td>
<td>Commonwealth Fundings &amp; Requirements</td>
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<td>Handbook 2.0</td>
<td>● SOMAH &amp; MASH Stacking</td>
<td>May 2020</td>
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<td></td>
<td>● Progress Payments</td>
<td>December 2020</td>
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<td>Handbook 3.0</td>
<td>● Application Pipeline Management (Lottery)</td>
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<td>● Required Notification for Early Job Trainee Termination</td>
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<td></td>
<td>● System Changes Affecting Incentive Amounts</td>
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<td></td>
<td>● Assorted minor updates</td>
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</tr>
<tr>
<td>Handbook 4.0</td>
<td></td>
<td>May 2021</td>
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</table>
Application Pipeline Management

• What: Replacement of first-come, first-served approach with a lottery system triggered by high volume

• How: Provide 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: SOMAH’s 2022 budget cycle, if needed
Session 2: Program Changes
Program Handbook Substantive Changes

Pace-dependent lottery: **Scenario A**

Lottery is triggered

- Announce waitlist opening 30 days prior to opening
- PowerClerk opens for 2-week period
- Lottery is triggered when applications exceed 120% of the annual budget
- PowerClerk is closed to new applications, application/sorting process is completed

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.
Pace-dependent lottery: **Scenario A**

Lottery is triggered, cont.

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

PowerClerk is closed for Track A applications
Pace-dependent lottery: **Scenario B**

Lottery is not triggered
Pace-dependent lottery: **Scenario B**

- Applications are processed first come first serve 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
- Track A budget threshold is equal to 120% of the annual budget
- Track A budget threshold is equal to 200% of the annual budget
- PowerClerk is closed until the next funding cycle

Lottery is not triggered, cont.
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 meet job training requirements regardless of early trainee terminations
- **When**: PA will provide guidance within 5 days
System Changes affecting Incentive Amounts

- **What**: PA will pay additional incentive for larger systems under specific circumstances
- **How**: Pending approval of additional load justification; budget allowing and at current incentive level
- **Why**: To allow post-solar sizing tool system size increases for approved load additions
- **When**: Additional load justification due at Proof of Project Milestone
Session 2: Program Changes
Program Handbook Minor Revisions

- Incentive rate at time of application submittal
  - An application’s incentive rate will be based on the current incentive rate available at time of submittal

- No reservation transfers
  - The applicant cannot change the project site address on the application
Session 2: Program Changes
Program Handbook Minor Revisions

● Wage requirement (contractor vs. subcontractor)
  ● Existing wage floor requirement is tied to the contractor’s entry-level wages (rather than the subcontractor’s)

● Required job posting timeline
  ● Job posting must be entered in the SOMAH Job Training Portal 60 days or more before installation start date to provide more time to match contractors, trainees and/or JTOs

● Tenant education requirements
  ● Tenant education requirements must happen 60 days or less before the installation start date to ensure tenants are aware of the SOMAH benefits including rate changes, and job training opportunities.
Session 2: Program Changes

Program Handbook Minor Revisions

● Energy Efficiency Compliance Milestone (EECM) Lookback
  ● Lookback increased from 3 years to 5 years for applicants pursuing EECM Pathway 1 compliance

● Electronic incentive payments
  ● The PA now offers an electronic payment option for application deposits and incentive payment

● Grounds for SOMAH incentive payment clawback
  ● Provide grounds for incentive payment clawback for noncompliance with program requirements
Session 2: Program Changes

Program Handbook Minor Revisions

• Affidavit Ensuring Income Level Compliance
  • Additional pathway for projects that do not have the tenant income levels listed in the property's regulatory agreement

• Cover sheet for Multifamily Low-Income Housing Documentation
  • Updated documentation to include the Affidavit Ensuring Income Level Compliance

• Ineligible Multifamily Housing Properties
Increasing CalES DACs participation

*Image: Gwen Chang of CBO partner CEJA, presents at a SOMAH community workshop.*
Session 2: Program Changes

On the Horizon: Expanding DACs Participation

<table>
<thead>
<tr>
<th>Pollution Burden</th>
<th>Environmental Effects</th>
<th>Population Characteristics</th>
<th>Socioeconomic Factors</th>
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<tr>
<td>Ozone</td>
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<td>Asthma</td>
<td>Educational Attainment</td>
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<td>PM2.5</td>
<td>Solid Waste Sites and Facilities</td>
<td>Cardiovascular Disease</td>
<td>Housing Burdened Low Income Households</td>
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<td>Diesel Particulate Matter</td>
<td>Drinking Water Contaminants</td>
<td>Low Birth Weight Infants</td>
<td>Linguistic Isolation</td>
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<td>Toxic Releases from Facilities</td>
<td>Traffic</td>
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<td>Poverty</td>
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<tr>
<td>Pesticide Use</td>
<td>Hazardous Waste Generators and Facilities</td>
<td></td>
<td>Unemployment</td>
</tr>
</tbody>
</table>

**NEW**
Session 2: Program Changes

On the Horizon: Expanding DACs Participation

- Shared interest in expanding DAC participation & driving engagement past parity across PA, CPUC, and CBO partners

- Co-equal eligibility pathways: “Low-Income” and “DAC”

- Current program goals & efforts:
  - Reach **all owners** in DACs
  - Targeted hiring, with **at least 50%** of JT opportunities to residents of DACs
  - New Central Valley CBO partnership in 2020
  - Tier 2 partnership program TBA
<table>
<thead>
<tr>
<th>IOU Service Area</th>
<th>Total # of Eligible Properties</th>
<th>Total # of Eligible Properties in DACs (% by IOU)</th>
<th>Total # of Applications in DACs</th>
</tr>
</thead>
<tbody>
<tr>
<td>PG&amp;E</td>
<td>2,031</td>
<td>582 (29%)</td>
<td>46</td>
</tr>
<tr>
<td>SCE</td>
<td>1,014</td>
<td>453 (45%)</td>
<td>57</td>
</tr>
<tr>
<td>SDG&amp;E</td>
<td>342</td>
<td>65 (19%)</td>
<td>12</td>
</tr>
<tr>
<td>Liberty</td>
<td>10</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Pacificorp</td>
<td>30</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>3,427</strong></td>
<td><strong>1,100 (32%)</strong></td>
<td><strong>115</strong></td>
</tr>
</tbody>
</table>
Session 2: Program Changes
On the Horizon: DACs Market & Participation Summary

Eligible DAC Properties vs Applications by IOU

- SDG&E: 12 DAC projects, 65 Eligible DAC Properties
- SCE: 57 Eligible DAC Properties
- PG&E: 46 Eligible DAC Properties

Eligible SOMAH Properties in DACs

Legend:
- SOMAH-Eligible Properties in DACs
- CalEnviroScreen 3.0 DACs
- SOMAH IOU Territories
Support for public goals/benchmarks for DACs participation rather than a formal carve-out (program change)

- Concerns about making the program more complex
- Participation by low-income properties (not in DACs) is important for desegregation and keeping folks in their homes
- Funds available in all IOU territories; hard carve-out could lead to waitlisting for low-income properties not in DACs and slow progress to 300 MW
- Could consider a carve-out later, if benchmarking doesn’t work or if funds become scarcer
- Need to target outreach to owners with properties in DACs, and support contractors in reaching more DAC owners
SOMAH Community-Based Organization Partners

- Support for **public goals/benchmarks** for DACs participation rather than a formal carve-out (program change)
- Concerns about a protracted or contentious regulatory process
- DACs are already the primary focus of CBO work
- A carve-out (especially a conditional one) would be functionally equivalent to a program benchmark
- Need IOU-specific benchmarks which roll up into an overall program benchmark
- How do we motivate DACs participation regardless of whether we set carve-outs or benchmarks? What are the carrots or sticks?
- Need for an intentional, data-driven process to set benchmarks, which can at times feel arbitrary
Disadvantaged Communities Advisory Group (DAC-AG)

- May 21st meeting (Note: This was a new DAC AG cohort; there was not a quorum of members present and no “vote” or more formal recommendation was issued)

- Tacit support for formal carve-out/set-aside (program change) rather than a less formal benchmarking process
  - Importance of formally prioritizing this subset of low-income Californians, who bear a disproportionate health burden due to pollution
  - Some discussion of waitlisting as a normal and acceptable outcome
  - Some tacit support for aggressive targets (with mentions of 50%, 75%)
Design parameters - what we ideally want to avoid:

- Slowing attainment of 300 MW by 2030
- Unnecessary waitlisting, stop-start
- Increasing program complexity
- Increasing admin burden/complexity

Discussion for today's forum:

- There’s an estimated 31% of potentially-eligible properties and 35% of potential capacity (MW) is in DACs -- what share of applications, MWs, or budget marks “success” with regard to DACs participation?
- What changes would help to incentivize and support additional participation in DACs?

Next steps
Quick Poll
Discussion question:
What program support or changes would help increase your engagement with properties in DACs?
Session 2:
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
Looking Ahead & Next Steps

Upcoming Events

• June 22, 2021: 11 a.m. PST Tenant Education Webinar
• June 30, 2021: 10 a.m. PST Inspections Overview
• July 8, 2021: 10 a.m. PST Applicant and Contractor Eligibility Training
Looking Ahead & Next Steps
What’s Next?

Be the face of SOMAH!
Share your experience

We're looking for:
• Participants to interview
• Photos from projects
• Stories to tell

Interested in being featured?
Email: contact@CalSOMAH.org
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 6/9/21)

● Q3 Forum scheduled for 8/18/21 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!