# SOMAH

SOLAR ON MULTIFAMILY AFFORDABLE HOUSING

## PUBLIC FORUM: June 2, 2021

# Welcome & Introductions
## Agenda Overview

SOMAH

1:00 - 1:05     **Welcome & Introductions**

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 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. 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

SOMAH

- 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
  - Use the chat box or to write in your comment or question
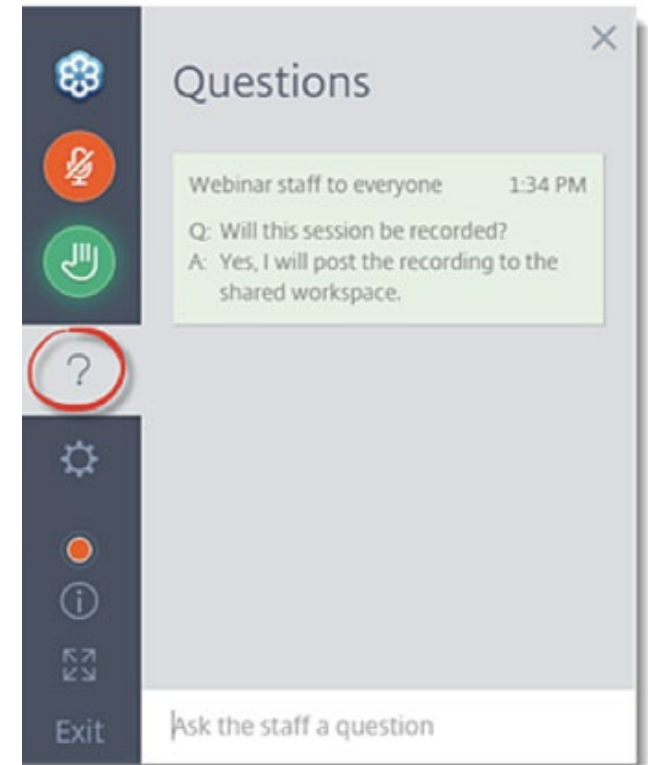
# Welcome & Introductions
## Access & Follow Up

- 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 (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

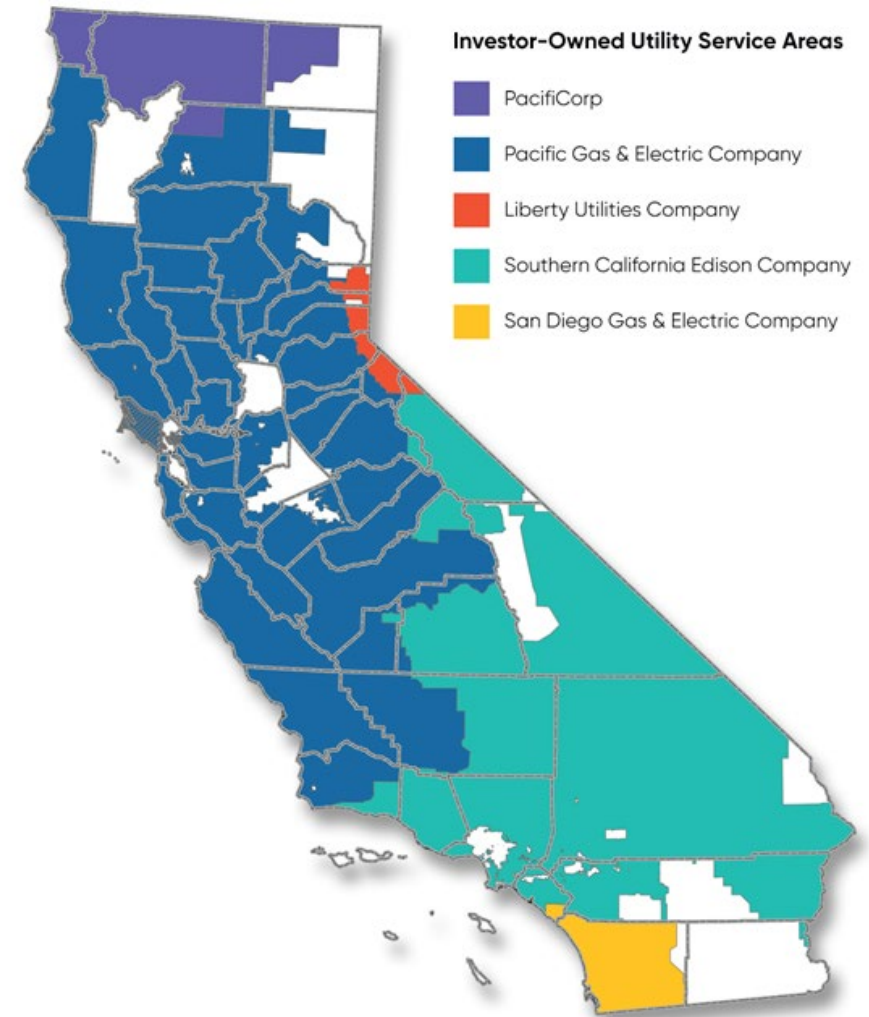# Session 1: SOMAH Program Update

Kajsa Hendrickson & Sarah Hill

SOMAH

# Application Breakdown

| Utility Territory | # of Active Applications |
|---|---|
| Pacific Gas & Electric | 221 |
| Southern California Edison | 120 |
| San Diego Gas & Electric | 57 |
| PacifiCorp | 1 |
| Liberty Utilities | 2 |
| **Totals** | **401** |

**Investor-Owned Utility Service Areas**

- PacifiCorp
- Pacific Gas & Electric Company
- Liberty Utilities Company
- Southern California Edison Company
- San Diego Gas & Electric Company

# Where We Are Today

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

| Utility | Available Funding | Status |
|---|---|---|
| **Liberty Utilities** | ~$948,000 | Funds available today |
| **PacifiCorp** | ~$3,806,000 | Funds available today |
| **PG&E** | ~$80,135,000 | Funds available today |
| **SCE** | ~$153,799,000 | Funds available today |
| **SDG&E** | ~$28,186,000 | Funds available today |

# Where We Are Today

SOMAH

- **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



Both

CalEnviroScreen Disadvantaged Communities

Tenants With Low Incomes Relative to Their Communities
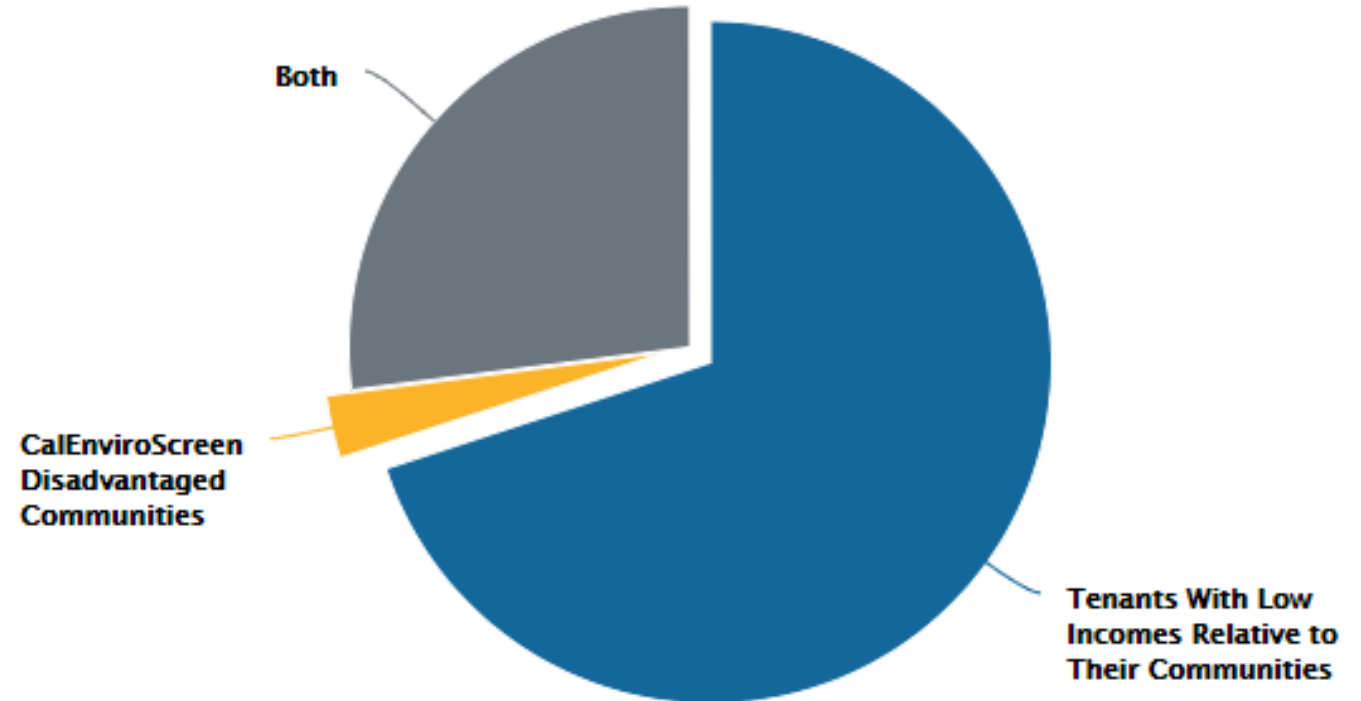
*DACs are defined as "the top 25% scoring areas from CalEnviroScreen along with other areas with high amounts of pollution and low populations" SB 535

# 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
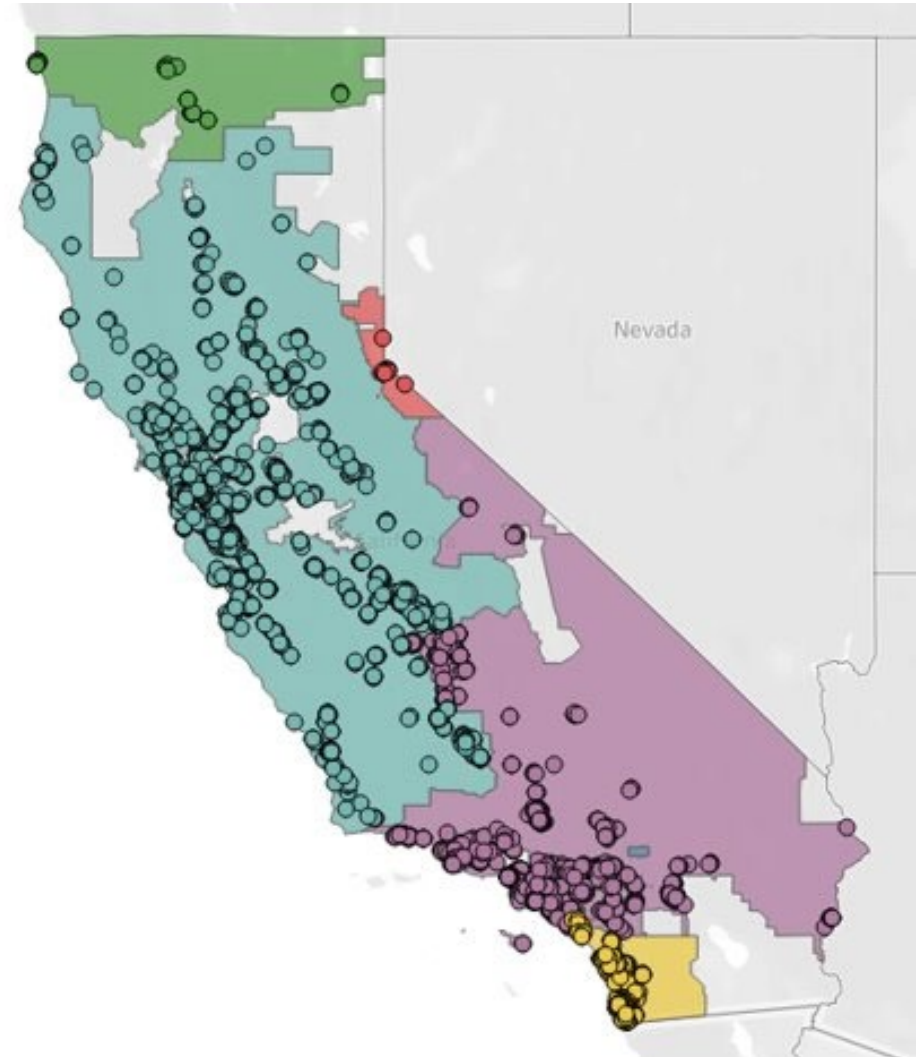  - Leveraging nearly **100** job training organization relationships

# Eligible Properties Map Preview

SOMAH

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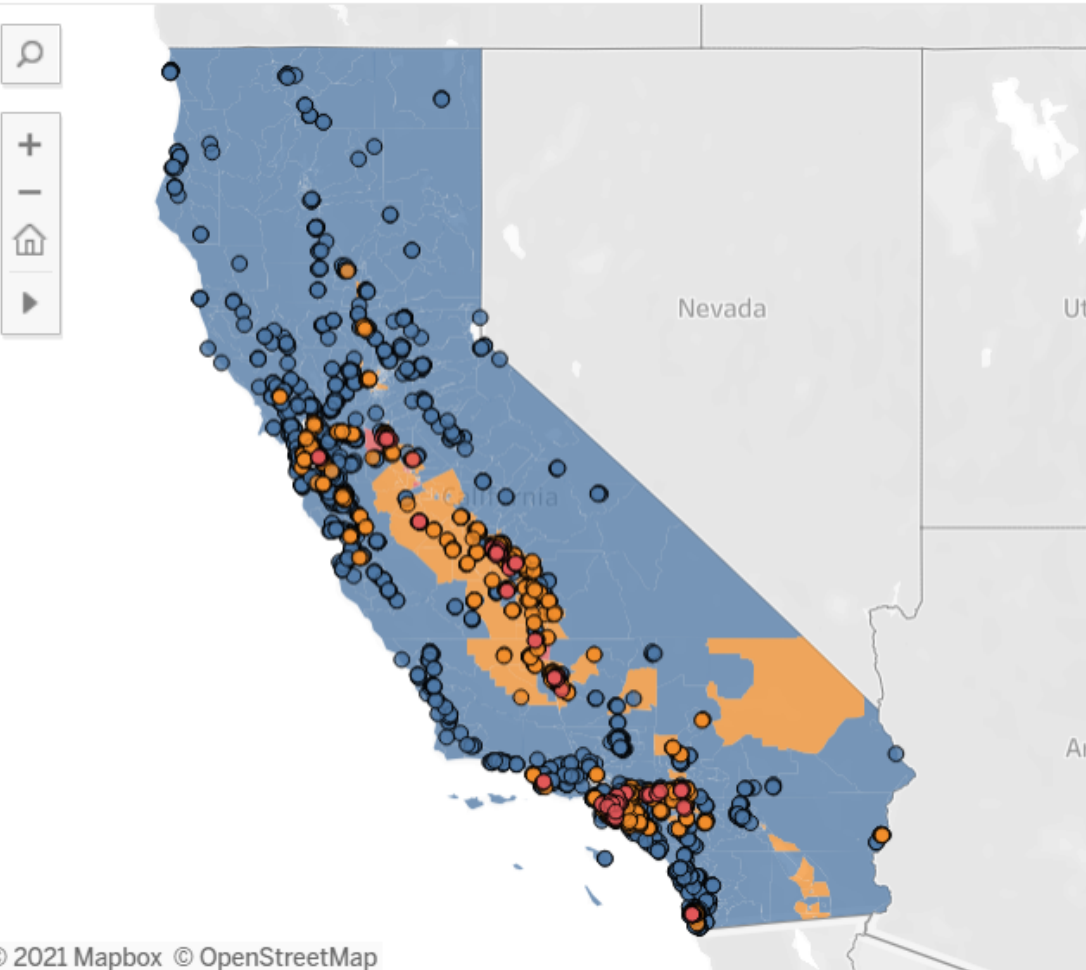  - Legislative districts
  - Climate zones
- Advanced filters

https://calsomah.org/eligible-somah-properties-map

# Eligible Properties Map: Demonstration

**SOMAH**

## Property Locations and Disadvantaged Communities



© 2021 Mapbox  © OpenStreetMap

The **[5] Property Locations by [1] Disadvantaged Community** map displays the location of
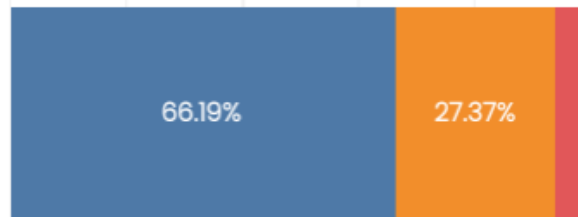
## Affordable Housing Units by Disadvantaged Community
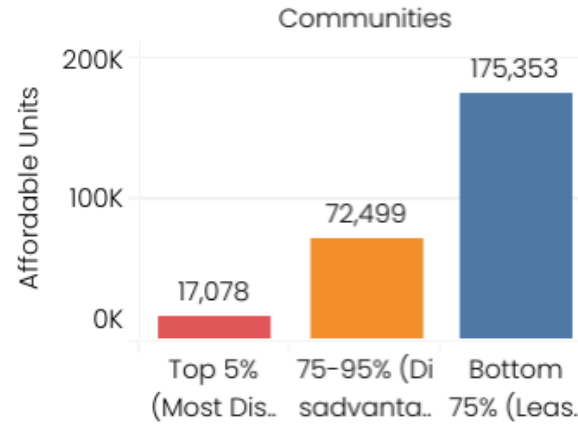


This chart shows the number of affordable housing units by disadvantaged community status.

## Percent of Total Based on Filter Criteria



66.19%   27.37%

## Affordable Housing Units [7] by Street Address

| Street Address | |
|---|---|
| 1St. Ave., Oakland, 94606 | 55 |
| 1St. St., Lincoln, 95648 | 206 |
| 2nd St., Downey, 90241 | 49 |
| 2nd St., Santa Monica, 90401 | 43 |
| 3rd Ave. , Chula Vista, 91910 | 74 |
| 3rd Ave., Chula Vista, 91911 | 127 |
| 3rd Ave., San Diego, 92101 | 194 |
| 3rd Ave., Walnut Creek, 94597 | 47 |
| 3rd St, Biola, 93606 | |
| 3rd St. , Richmond, 94801 | 51 |
| 3rd St. , Santa Monica, 90403 | 72 |
| 3rd St., Alhambra, 91801 | 74 |
| 3rd St., Downey, 90241 | 29 |
| 3rd St., Laguna Beach, 92651 | 24 |
| 3rd St., Lincoln, 95648 | 69 |

# 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

# Eligible Properties Map: What's Next

- County search option

- Congressional overlay

- Total property count based on filters

- % of active applications based on filters
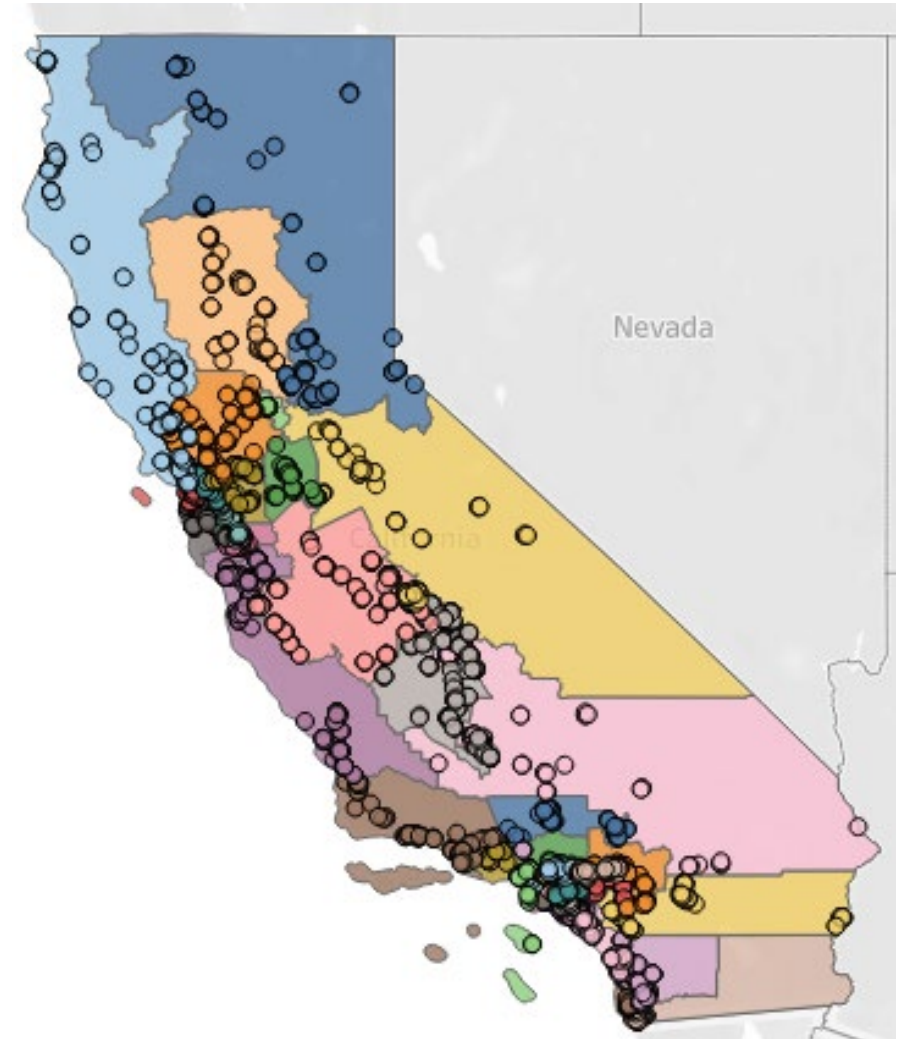
# Job Training: Resources & Expectations

## 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.

# 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

# 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**

# 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 11a.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)

# COVID-19 Impacts & Updates

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%**

# COVID-19 Impacts & Updates

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%**

# COVID-19 Impacts & Updates

## 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

# 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
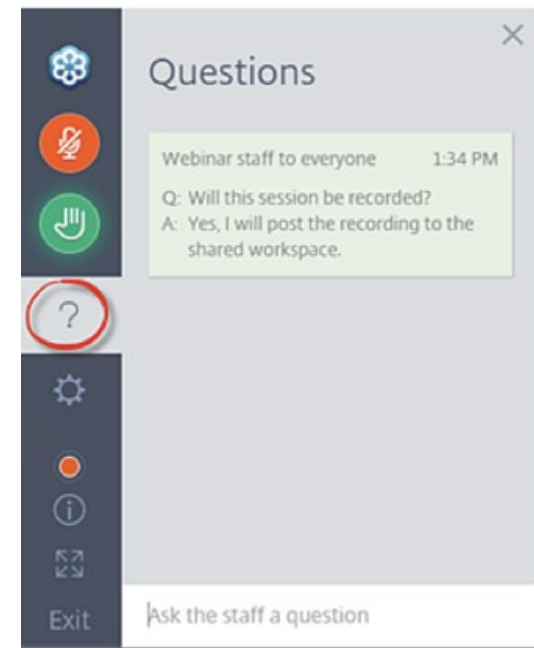
# Session Overview

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

1. Program Changes: On the Horizon

# Program Handbook Updates & Refresher

## Overview

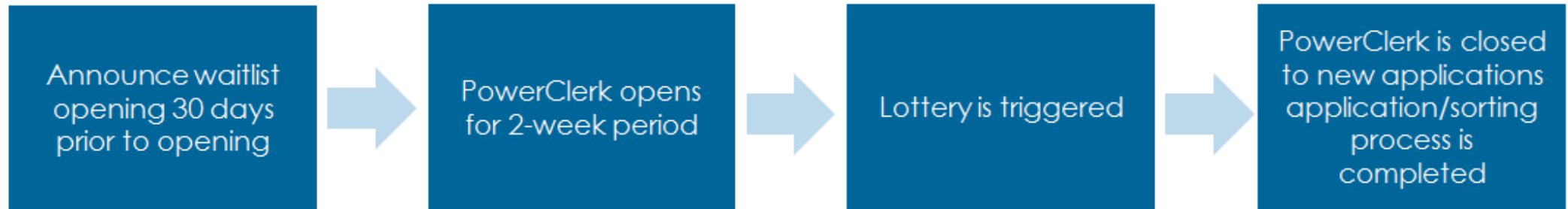| Version | Major Updates | Status |
|---|---|---|
| Handbook 1.0 (original) | ------ | March 2019 |
| Handbook 2.0 | • SOMAH & MASH Stacking | May 2020 |
| Handbook 3.0 | • Progress Payments | December 2020 |
| Handbook 4.0 | • Application Pipeline Management (Lottery)<br>• Required Notification for Early Job Trainee Termination<br>• System Changes Affecting Incentive Amounts<br>• Assorted minor updates | May 2021 |

# Program Handbook Substantive Changes

## 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*

# Program Handbook Substantive Changes

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

Lottery is triggered

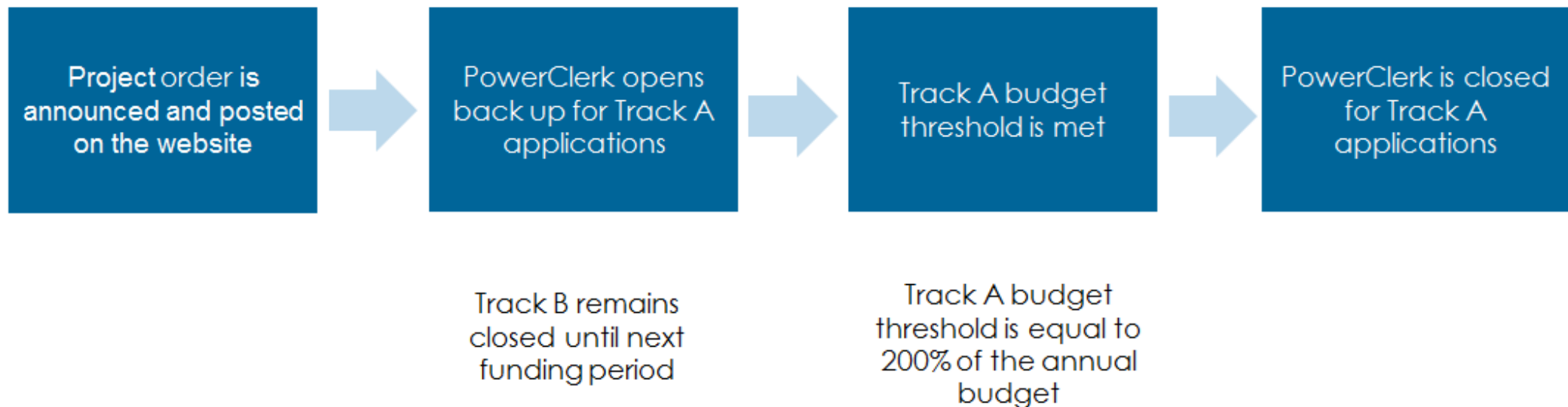| Announce waitlist opening 30 days prior to opening | → | PowerClerk opens for 2-week period | → | Lottery is triggered | → | PowerClerk is closed to new applications application/sorting process is completed |
|---|---|---|---|---|---|---|
| | | | | Lottery is triggered when applications exceed 120%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

# Program Handbook Substantive Changes

Pace-dependent lottery: **Scenario A**

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 | → | PowerClerk is closed for Track A applications |
|---|---|---|---|---|---|---|
| | | Track B remains closed until next funding period | | Track A budget threshold is equal to 200% of the annual budget | | |

# Program Handbook Substantive Changes

Pace-dependent lottery: **Scenario B**

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

# Program Handbook Substantive Changes

SOMAH

Pace-dependent lottery: **Scenario B**

Lottery is not triggered, cont.

| Applications are processed first come 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 | → | 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

# Program Handbook Substantive Changes

**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

# Program Handbook Substantive Changes

## 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

# 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

# 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.

# 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

# Program Handbook Minor Revisions

SOMAH

- 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

# On the Horizon: Expanding DACs Participation

# On the Horizon: Expanding DACs Participation

**SOMAH**

- 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
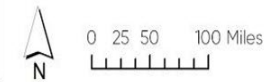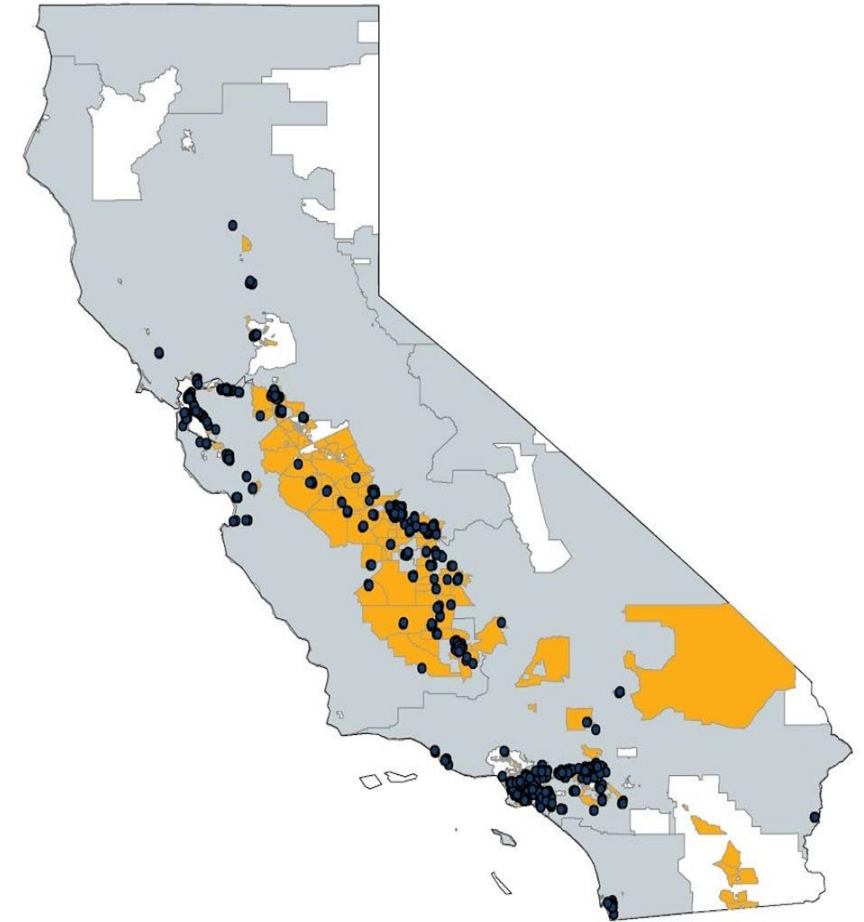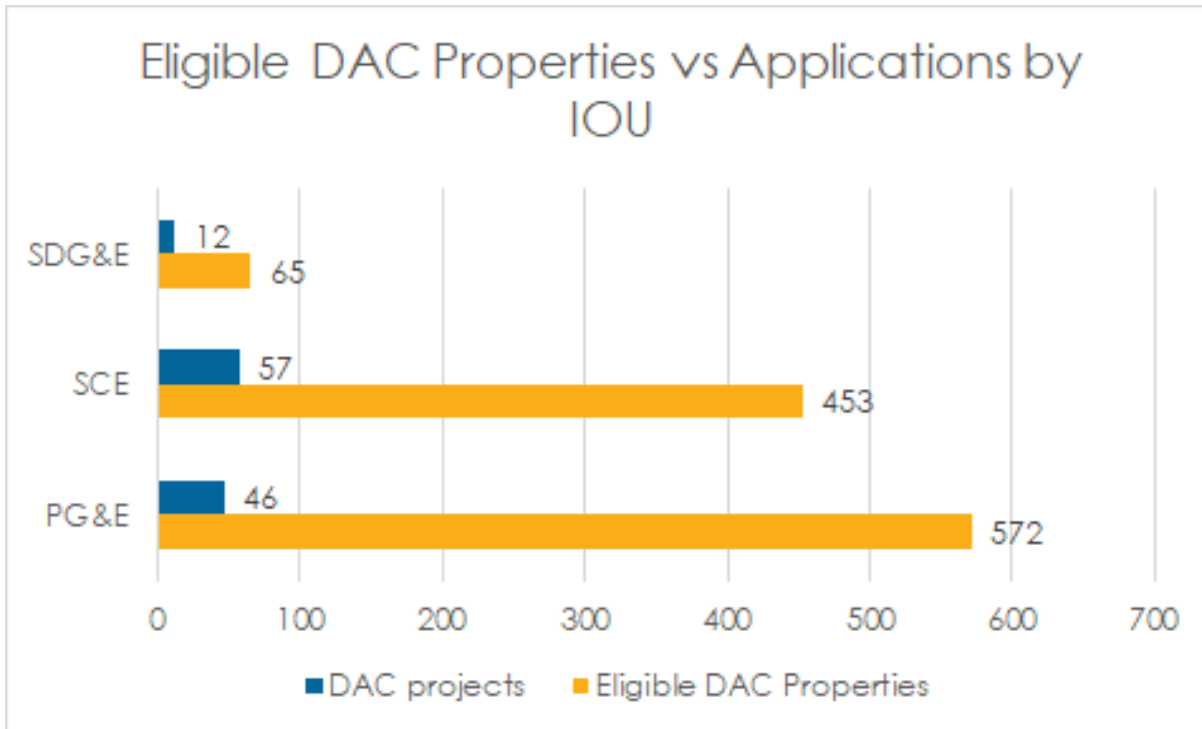
  - Tier 2 partnership program TBA

# On the Horizon: DACs Market & Participation Summary

| IOU Service Area | Total # of Eligible Properties | Total # of Eligible Properties in DACs (% by IOU) | Total # of Applications in DACs |
|---|---|---|---|
| PG&E | 2,031 | 582 (29%) | 46 |
| SCE | 1,014 | 453 (45%) | 57 |
| SDG&E | 342 | 65 (19%) | 12 |
| Liberty | 10 | 0 | 0 |
| Pacificorp | 30 | 0 | 0 |
| **Total** | **3,427** | **1,100 (32%)** | **115** |

# On the Horizon: DACs Market & Participation Summary



Eligible DAC Properties vs Applications by IOU

| IOU | DAC projects | Eligible DAC Properties |
|---|---|---|
| SDG&E | 12 | 65 |
| SCE | 57 | 453 |
| PG&E | 46 | 572 |

■ DAC projects  ■ Eligible DAC Properties



Legend
- • SOMAH-Eligible Properties in DACs
- ■ CalEnviroScreen 3.0 DACs
- ■ SOMAH IOU Territories

0  25 50    100 Miles

N

**Eligible SOMAH Properties in DACs**

## On the Horizon: DACs Participation - Stakeholder Engagement Report-Out

SOMAH

## SOMAH Advisory Council

- 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

# On the Horizon: DACs Participation - Stakeholder Engagement Report-Out

## 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

## On the Horizon: DACs Participation - Stakeholder Engagement Report-Out

### 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%)

# On the Horizon: DACs Participation - Discussion

**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
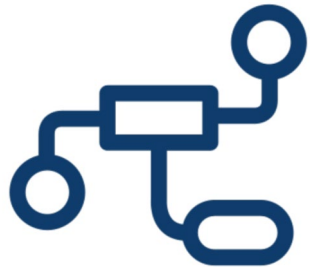
**Discussion for today's forum:**

- 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?
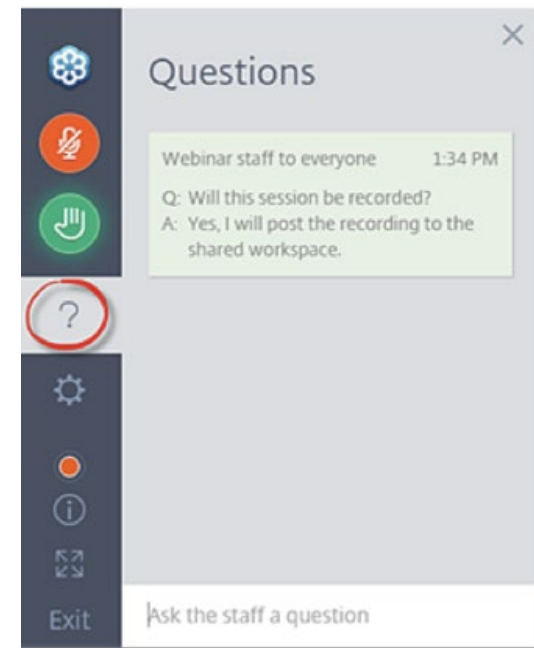
**Next steps**

# Quick Poll

**Discussion question:**
What program support or changes would help increase your engagement with properties in DACs?

# 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

# What's Next?

SOMAH

**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**

# SOMAH

SOLAR ON MULTIFAMILY AFFORDABLE HOUSING

# Thank you!