

Meeting Notes

Solar on Multifamily Affordable Housing (SOMAH) 2020 Q1 Advisory Council Meeting

February 6th, 2020

North Santa Fe Apartments, 301 N. Santa Fe Avenue, Vista 92084

Attendees

SOMAH Program Administrators

Chris Walker | SOMAH Program Manager

David Lee | SOMAH Technical Coordinator

Gabby Carranza | SOMAH Program Coordinator

Jae Berg | SOMAH Program Manager

Marisa Villarreal | SOMAH Program Manager

Sarah Salem | SOMAH Tenant Services Manager

Srinidhi Sampath | Sustainable Housing Program Manager

SOMAH Advisory Council Members

Allen Hernandez | Center for Community Action & Environmental Justice

Agustin Cabrera | Los Angeles Alliance for a New Economy

Andrea Barnier | Self-Help Enterprises

Andres Ramirez | Pacoima Beautiful

Lauren Randall | Sunrun

Cynthia Strathman | Strategic Actions for a Just Economy

JB Tengco | BlueGreen Alliance

Kenneth Wells | O&M Solar Services (Chair)

Sochiata Vutthy | Community Housing Works

Meeting Agenda

1. Meeting Welcome & Re-introductions
 2. Program Status & Update
 3. Review Proposed SOMAH Program (Handbook) Changes
 4. 2020 Marketing, Education & Outreach Discussion
 5. Tenant Education & Community-Based Organization Updates
 6. Next Steps & Wrap-up
-

Meeting Welcome & Re-introductions

Session lead: Marisa Villarreal, SOMAH Program Manager

SOMAH Program Manager Marisa Villarreal led a welcome and round of re-introductions for the Advisory Council (AC). SOMAH Program Coordinator David Lee led an interactive communications activity to start the meeting. Marisa also reviewed the meeting goals and agenda.

Program Update and Overview

Session lead: Marisa Villarreal, SOMAH Program Manager

Marisa led a recap of the previous AC meeting (see notes [here](#)), and pending action Advisory Council action items. The program status update included a review of SOMAH Program goals and updates. Some key updates by program area are below:

Applications

- There was an influx of applications towards the end of 2019.
- For the first time in the program, there are applications in all IOU (investor-owned utility) territories.
- 117 active applications (no change since Q4 2019)
- 183 applications on the waitlist (up from 136 in Q4 2019)
- With application review and processing, the SOMAH PA is finding many project system sizes are actually decreasing, due to initially being oversized by applicants. This has freed up funding for waitlisted projects, allowing several projects to move off of the waitlist.

Utility Territory	# of Active Applications	# of Waitlist Applications
Pacific Gas & Electric	53	88
Southern California Edison	50	59
San Diego Gas & Electric	12	36
PacifiCorp	1	0
Liberty Utilities	1	0
Totals	117	183 (136)

Marketing, Education & Outreach (ME&O)

- The 2020 ME&O Plan is in the final stages of development and will be finalized by the end of February 2020.
- The 2020 ME&O plan outlines the high-level goals and objectives for SOMAH's ME&O efforts for 2020, and provides activities, tactics, as well as KPIs for each objective that support attainment of goals and objectives.
- The 2020 plan will prioritize:
 - Increasing geographic diversity of projects
 - Increasing the number and diversity of participating contractors and property types
 - Emphasizing the Track A, Upfront Technical Assistance pathway for property owners, and gaining a better understanding of the demand for technical assistance
 - Direct property-owner outreach, and engagement
 - Direct tenant outreach and education
 - Increasing job trainee opportunities and participation
 - Storytelling SOMAH's success, and highlighting projects/contractors/trainees to demonstrate program efficacy and spur additional participation
- The SOMAH AC reviewed and provided feedback on the ME&O plan.

Tenant Education

The SOMAH PA has emphasized its partnerships with community-based organizations (CBOs) and the development of strategies and collateral to engage tenants. Collateral has been developed with updated translations and will be available soon.

Workforce Development

The PA will be introducing a new job training webinar in the near future. SOMAH staff were able to visit a job site to gather photos and stories of experiences from job trainees. The application deadline for SOMAH's JTO (Job Training Organization) Task Force is February 14 and the PA is hoping to have the first meeting in mid-March.

Chris Walker emphasized the need for representation from varying regions. In regards to SOMAH having both a JTO Task Force and Advisory Council, the intention is to not duplicate efforts. The PA wants to ensure the AC and JTO Task Force are connecting and collaborating in a way that the PA will continue to scope and explore as the JTO Task Force advances.

Technical Assistance (TA)

The TA team is working on integrating solar, storage, clean transportation, and energy efficiency into its programming to raise awareness about related programs and their offerings, de-silo, and assist participants in capturing benefits of participation. It is also assisting the ME&O team with developing a webinar series, video series, and one-page flier for property owners (POs) to learn more about SOMAH's TA services.

Program Implementation

The PA held its first Public Forum in October of 2019, which was mostly attended by contractors. The next Public Forum will be in March 2020 and will include program updates. The third Public Forum (Q3 2020) will be centered around job training.

Discussion

- **AC Member:** What were the reasons for the decrease in active applications for SCE? Is there a number on how many applications will be ready to be installed? Are the applications close to completion?
- **SOMAH PA:** Reservations are making their way through the various milestones required for installation, though some applications appear to be speculative or less developed. We are hoping to get some of the applications that are close, ready for installation soon. Many applicants are also not submitting the necessary information and documents to advance to the next stage of application processing and are dropping out. Some attrition is a normal occurrence within the program administration space, though we are providing as much support as possible to support project-level success.
- **AC Member:** How long does it take for a project to move to installation?
- **SOMAH PA:** It's an 18-month reservation, but we don't have a clear timeline of how long the project will take to move from reservation to installation. This will vary by project given the number of variables, whether they be administrative, financial, construction-related, etc.

Proposed SOMAH Program (Handbook) Changes

Session lead: Chris Walker, SOMAH Program Director

Chris gave an overview of SOMAH's waitlist and presented potential changes intended to ensure incentive funds are equitably distributed across participants; and highlighted some possible solutions to ensure job training requirements are fulfilled even under scenarios in which a trainee is terminated or otherwise unavailable to complete the required hours.

Waitlist/Application Processing

SOMAH launched with a first-come, first-served application processing methodology that resulted in disproportional funding reservations across an already small number of participating contractors. In response to the current waitlist after initial launch, the PA is looking into solutions to improve contractor diversity and property-owner led applications (Track A) among reservations and ultimately SOMAH-funded projects, for future application submissions. The PA does not wish to be punitive to successful contractors, but rather equitable access to SOMAH funding across participating contractors and property owners.

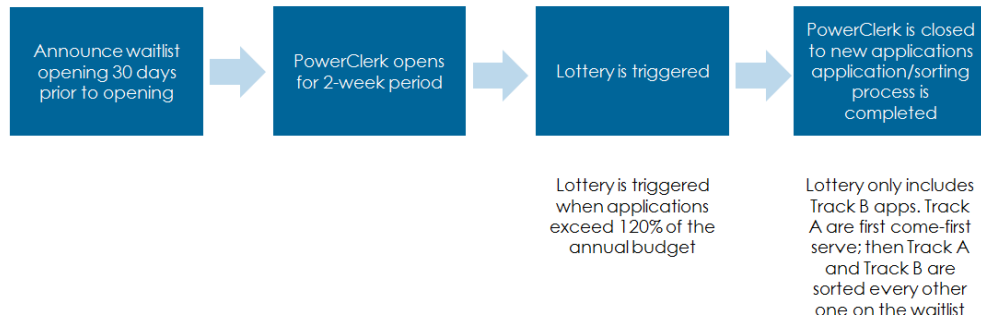
Proposed Approach

- Replace the first come, first serve approach with a conditional lottery that is only activated if needed.
- Retain flexibility to make adjustments to the waitlist depending on current need.

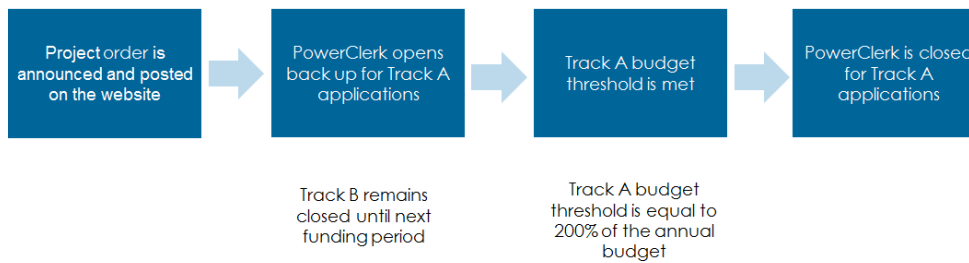
Process: Pace-Dependent System

- Reviewed scenarios for triggering the lottery
 - The two scenarios are as follows:

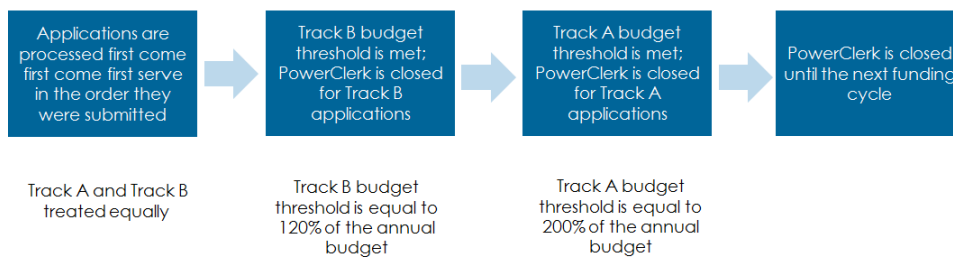
Lottery is triggered



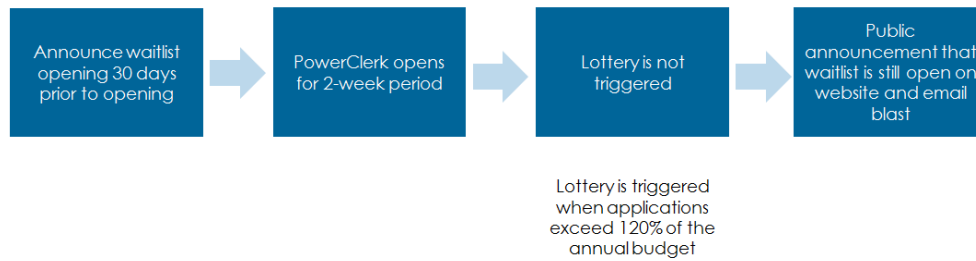
Lottery is triggered, cont.



Lottery is not triggered, cont.



Lottery is not triggered



- The two scenarios represent flexibility and each approach helps to manage one another.
- The PA is not proposing hard cut-offs, participation caps or application limits, but rather a way to manage the pipeline.

Discussion

- **AC Member:** Is there a way that these scenarios would work for future roll out?
- **SOMAH PA:** The triggers for the scenarios are meant to provide a buffer that allows applications to fall off (due to oversizing, attrition) and applications in the waitlist to fill those gaps.
- **AC Member:** Could there ever be a situation where the two scenarios happen at the same time?
- **SOMAH PA:** No, scenarios proposed are mutually exclusive, and the PA has designed prospective budget thresholds tied to our annual budget for each scenario, so we can have longer waitlists and shift funding to projects on waitlist. We may need to temporarily close application pipelines to implement this, but per the updated language, the PA would have to provide notification in advance of any application pipeline closure. We would propose that thresholds are subject to change at the PA's discretion so that we can be responsive to pipeline realities and adjust nimbly. The new language is to maintain flexibility and adapt to the thresholds if needed.
- **AC Member:** I like what we have here--it allows flexibility without having to make large changes.

Chris called for a vote and received full support from the AC.

Trainee Early Termination

The PA has received an inquiry about how to handle early termination (whether quitting or firing) of job trainees and is concerned about creating rigid barriers for contractors that would prevent them from receiving incentive funds. The PA's initial thought is to handle termination on a case-by-case basis, requiring the contractor to meet the spirit of the job training requirement through alternate compliance pathways.

Discussion

- **SOMAH PA:** The PA may want to add language to include decisions for contractors to find another trainee.
- **AC Member:** I am unsure about what “no exception” means under Section 2.8.5 of the handbook. What if a project is near completion? Would contractors need to find another trainee?
- **AC Member:** One way to hold contractors accountable is to reduce incentive funds if not in compliance. Does incentive money go to subsidize trainee wages?
- **AC Member:** One idea is if we’re trying to hold contractors accountable to fulfilling the trainee requirements, and not take advantage of potential exceptions, we could note that the trainee funding is partially “subsidized” by SOMAH incentives, and by not fulfilling the requirement, the contractor risks a reduced incentive.
- **AC Member:** Are we expecting contractors to wait for a decision from the PA after filing their alternative compliance request? I am concerned that the wait time for a PA response could result in project delays.
- **AC Member:** This could present a delay. Would contractors need to catch up on hours once employing a new trainee? The PA could add language that says if a trainee leaves prior to completing their full trainee hour requirements, a new trainee could make up the difference.
- **AC Member:** We shouldn’t expect contractors to wait two weeks. The PAs should respond quickly or have language that states exactly what to do within 24-48 hours.
- **AC Member:** Could SOMAH’s JTO Task Force advise on this?
- **AC Member:** There should be a difference in how voluntary and involuntary termination is treated. Maybe the hours can roll over from the previous trainee if the drop-out is voluntary.
- **AC Member:** Could you have a union model, similar to a “hiring hall,” where the contractor is able to refill a vacant/early termination position with qualified “replacement” trainees? It’s a good faith effort to try and fill the vacated position.
- **SOMAH PA:** This was an intention and the function of the job training portal on the CalSOMAH.org website -- to have a pool of trainees ready for hire.
- **AC Member:** To prevent anyone from challenging the policy you’ve put in place, the PA should say there are no exceptions, and assess on a case-by-case basis.

There was consensus among the AC to not remove the “no exceptions” language and evaluate early termination situations on a case-by-case basis to determine the best course of action.

Soft Project Cost Cap

- Cost caps are intended to be a means of placing limitations on project costs (per Watt) to ensure consumer protection and encourage market development.
- The PA proposed method for determining and updating the soft cost cap:
 - PA monitors reported cost data at the proof-of-project milestone phase.
 - Applicant submits an explanation to the PA if costs are higher than the soft cost cap, and must secure an acknowledgement form from host customer
 - The cost cap is therefore “soft” since it may be exceeded
 - Note: There are some legitimate reasons why project costs may be “high”
- The PA noted it will most likely wait on making a Handbook update around cost caps until there is more accurate system cost information from SOMAH projects.

The AC voted and came to consensus on the decision to not move forward with or wait to move forward with addressing cost caps in the Handbook due to the need for additional data.

2020 Marketing Education & Outreach Plan Discussion & Feedback

Session lead: David Lee, *Technical Assistance Coordinator*

David provided a quick review of SOMAH's ME&O plan to align AC members with the marketing strategy that the PA has developed so far.

What the PA has noticed:

- There is significant pent-up demand
 - Result of highly engaged contractors prior to program launch
 - Because the program is new and general awareness is low, the program to-date has mostly contractor-driven, so, there is low volume for Track A apps
 - Low PO-driven applications also indicative of less time conducting outreach to this audience, and that outreach materializing into a decision to participate, which can often be a long process given project scale and affordable housing barriers
 - Greater push to reach POs, especially leveraging CBO partners to obtain geographic diversity
- High volume of applications led to the need to create a waitlist and even to close a waitlist
 - Diverted some attention to pivoting on a waitlist messaging strategy
 - Maintaining engagement with applications on waitlist
- Lack of contractor diversity
 - While the PA has over 100 contractors in its database, applications were only submitted by 9 of them

PA Priorities for 2020

- Build a multiyear pipeline of diverse projects
- Ensure equitable distribution of projects
- Build and engage a robust and diverse contractor base
- Ensure sufficient job trainee participation for projects to meet training requirements
- Educate tenants living in eligible and participating SOMAH-properties about the program and how to maximize their benefits
- Ensure stakeholders are informed of and engaged with the program

Property Owners

- 2019
 - Over 51 POs participating (23% of POs in the PA's database)
 - 12 US Department of Housing and Urban Development (HUD) properties - Letter already issued
 - 4 US Department of Agriculture (USDA) properties - Waiting on an official letter from the USDA allowing properties to install SOMAH systems
 - Gaps in Central Valley and LA
 - Upcoming webinar for Central Valley
 - Looking to expand outreach in LA
 - Low Track A uptake
 - Talking to properties and they have shown interest, but may lack the capacity to pursue opportunities; converting leads to participants is a long process that requires relationship-building
- 2020
 - Target hard-to-reach POs (Central Valley & LA)
 - CBO outreach and education to owners and tenants in targeted communities
 - Broaden audience: add to email list, new co-marketing partners, update contact information
 - Focus on program alignment
 - Salesforce: track progress and manage ME&O pipeline

Tenants

- 2019
 - Partnering with CBOs to engage targeted communities
 - Deployed Tenant Education Toolkit
 - Currently in 7 languages, including English
- 2020
 - Focusing on providing targeted support to:
 - Potentially eligible tenants
 - Tenants participating in SOMAH
 - POs and contractors on tenant education training
 - Coordination with IOUs to ensure proper routing of inquiries to PA or IOUs depending on context of inquiry
 - Tenant surveys and evaluation

Community-Based Organizations

- Outreach and education in targeted communities
- Engage eligible POs and their tenants
- In-person meetings
- Workshops and community meetings
- Educational materials

Contractors

- 2019
 - Decrease in number of *new* contractors joining trainings, but many repeat attendees solidifying knowledge of complex program
 - 337 attendees to date (as of Q1 2020)
 - 9 successfully submitted applications (up from 7)
- 2020
 - Focusing on requiring subcontractors to become eligible
 - Continue eligibility trainings bi-monthly
 - Contact eligible contractors to survey barriers to participation/submitting applications

Workforce + Job Trainees

- 2019
 - 5 job fairs, 4 webinars, and numerous JTO site visits
 - We had a trainee receive a job offer from a job site but accepted an offer elsewhere in the solar field.
- 2020
 - JTO Task Force currently taking applications
 - Developing job trainee success stories as projects begin construction

Other Stakeholder Outreach

- Highlight applications within jurisdiction
- Co-marketing and gaining potential PO leads if information is from trusted source (such as local government)
- Territory plan
 - DACs (Disadvantaged Communities) in the Central Valley
 - DACs in metropolitan regions
 - LMI (low-median income) neighborhoods where there is low participation

Tenant Education & Community-Based Organization Updates

Session lead: Marisa Villarreal, SOMAH Program Manager

Marisa provided an overview of Tenant Education (TE), the TE engagement plan, and CBO involvement. The group discussed holistic methods of engagement and how CBOs will carry out tenant education.

Tenant Education Review

- Affidavits -- signed and processed at different times in process
 - Affidavit ensuring 100% tenant economic benefit
 - Affidavit ensuring tenant education
 - So the PA can figure out when construction has started
 - Will shift from a 30-day to 60-day requirement prior to the start of construction so tenants have more time to apply to trainee jobs and to improve engagement for training opportunities.
 - Projects that started construction prior to the SOMAH program launch will need to provide additional documentation.
 - Education materials must be provided in languages appropriate for any non-English speaking tenants.
 - The PA reserves the right to request more documentation.
 - There are three materials that have to be sent to tenants within a wider suite of encouraged, though optional materials:
 1. What to expect with SOMAH
 2. How will your utility bill change?
 3. IOU ESA (Energy Savings Assistance) materials
 - Five other additional educational materials available

Tentative Tenant Education Evaluation Plan

- Surveys
 - Based on tenant population per IOU territory
 - The PA will determine the numbers of tenants desired for the survey once a date is selected.
 - Understanding there are different needs across the regions, the PA will create surveys that acknowledge and flex with the diversity.
- Focus Groups
 - 5 per IOU territory
- Interviews
 - 12 per IOU territory
- Evaluations will be incentive-based and in-person.
 - PA will coordinate among tenants, CBOs, and third-party evaluators.
- Objectives
 - Do current tenant education requirements for POs adequately prepare tenants for getting solar?

- Are the required tenant education materials useful to tenants?
- What are the most effective ways to conduct tenant education?
- What information do tenants find relevant?
- Is the program's financial impact significant for tenants?
- Timeline for evaluation
 - The PA is currently piloting the model.
 - The entire process could take over a year.
 - Entire timeline is dependent on project status and whether tenants are actually receiving bill credits and benefits.
- Upcoming Projects
 - PA and CBO-led PO Tenant Education Training in Q2 2020
 - Q2 Public Forum focused on tenants and job trainees
 - Tenant Toolkit revisions in July 2020

Discussion

- **AC Member:** The Tenant Education materials are geared towards adult audiences but could also focus on youth.
- **SOMAH PA:** The PA does have education programs geared towards youth we hope can help them cultivate a certain energy and perspective they can then bring back to their homes.
- **AC Member:** Materials should also extend to management companies -- they need to understand why solar is important to the community.
- **SOMAH PA:** Think about this not just as an annual or biannual occurrence. The PA wants to think about how we can sustain education at a property even after the SOMAH project is complete as needed and at relevant junctures, for example, when an apartment turns over to a new tenant, and ensure we have a plan to address that. Stakeholders also want these materials to go beyond solar by connecting SOMAH to efforts related to just transition and environmental justice.
- **AC Member:** If a new tenant moves in during the middle of a SOMAH project, what information is given to them?
- **SOMAH PA:** New tenants are provided with information on changes in their billing materials, and the PA has built in surveys to determine whether they'll be able to provide us with the right feedback.
- **SOMAH PA:** The PA is trying to tap into existing events that are happening at the property to have more dialogue with tenants.
- **AC Member:** In terms of tools and messaging, trade associations and companies have thought a lot about how to message this work to different audiences. You could borrow from this and look at their existing framing.
- **SOMAH PA:** A lot of the PA's current tools were generated from the work GRID Alternatives has done historically, but we appreciate the AC's guidance to ensure we're getting more feedback and being creative. We'd like to get understanding from POs as well who have already done this work.
- **AC Member:** Have you considered using phone apps or gamifying things?
- **SOMAH PA:** The PA would need to consider the audience's tech preferences. We don't want to assume everyone has access to technology, but we are exploring how to provide information through mediums other than paper materials.

- **SOMAH PA:** There is the idea of utilizing celebrity spokespersons and PSAs, like how the Solutions Project has used Leonardo DiCaprio and Mark Ruffalo. We'd also want to think about well-known local residents in the community who could take this on.
- **AC Member:** When we do engagement, we use the narrative of other tenants and people who have already had those experiences to help break down the trust barrier -- tenants as ambassadors.
- **SOMAH PA:** The best lead in our other experiences has been having neighbors as ambassadors, identifying leaders in the community and seeing how they want to be engaged or involved in promoting SOMAH.
- **AC Member:** Being able to support tenants moving into job training opportunities is also important.
- **SOMAH PA:** How often would the AC like to stay engaged?
- **AC Member:** We could assist in supporting how we disseminate information -- how can we get that information?
- **SOMAH PA:** It has been challenging to figure out the best way to reach POs, the gateway to the tenant community -- Webinars? CBO forums? Letters? How could the PA show them SOMAH's value and support them with this work?
- **AC Member:** From an educational standpoint, webinars can be great, but 1:1 outreach is also helpful. Also ask how they want to be contacted about it. PowerClerk requires a senior leader but that's not always the best point of contact.
- **SOMAH PA:** The PA has been discussing how to get the best point-of-contact info into PowerClerk, including on-site contacts.

CBOs

- Current CBO partners
 - Asian Pacific Environmental Network (APEN)
 - California Environmental Justice Alliance (CEJA)
 - Communities for a Better Environment (CBE)
 - Environmental Health Coalition (EHC)
- CBO Scopes of Work
 - Community engagement
 - Property owner engagement
 - Curriculum development
 - Provide program feedback
- Progress made with CBOs so far includes the hosting of a Toxics Tour, SOMAH ME&O Plan feedback, development of CBOs' ME&O plans and TE and Job Training material review
- The SOMAH PA shared some early statistics related to CBO engagement:

Develop and disseminate culturally and linguistically appropriate educational materials to CBOs	Q3 - Q4 2019	Number of materials developed and distributed	22
Ensure that CBOs host community workshops and table at community events	Q3 - Q4 2019	Number of presentations/tabling events held	2
		Number of attendees/table visitors	44
Ensure that CBOs host training webinars for other community organizations and leaders	Q3 - Q4 2019	Number of number of webinars / workshop	2
		Number of training webinars/attendees	17
Ensure that CBOs conduct outreach to local media, including earned media and op-ed placements	Q3 - Q4 2019	Number of media mentions	0
Ensure that CBOs conduct email and social media outreach to their networks	Q3 - Q4 2019	Number of visits to CalSOMAH.org referred by CBO network emails and social media	14
		Number of property owners applying	0
Ensure that CBOs conduct direct outreach to multifamily affordable property owners/operators, especially those not reached through other engagement venues	Q3 - Q4 2019	Number of applications attributable to direct outreach	0
		Number of direct outreach to property owners	22

- Lessons learned overview:
 - SOMAH is complicated – Onboarding and learning process for CBOs has been challenging and will take intentionality and more time
 - Integrated curriculum with Just Transition work
 - PO outreach
 - CBOs help generate leads, then transition to the PA
 - Verifying PO data
 - CBO audience distinction
- CBO Audiences
 - POs
 - Track A + Track B enrollment
 - Train the trainer -- educating POs how to educate tenants
 - Community members
 - Eligible SOMAH tenants
 - Potential job trainees
 - Potential contractors
 - Other CBOs
 - Tenants
 - SOMAH-eligible tenants → direct outreach
 - Tenants participating in SOMAH → indirect outreach through POs
- Challenges
 - Strengthening JTO connections
 - Tenant surveys – could possibly use CBOs' help
 - Regional gaps and expansion

Discussion

- **AC Member:** How successful has it been training POs to train tenants?
- **SOMAH PA:** This has not started yet, but we are starting to realize that POs may not be equipped to give the best engagement, so this is an area where the PA could step up. The PA wants to ensure POs aren't using CBOs as an out for them to not do the work. CBOs are there to help with TE requirements, but it shouldn't take the place of the POs.
- **CBO Partner:** EHC's early successes have been through reaching out to allies in the community and nonprofit developers who have existing communication channels, relationships, and engagement established with their tenants.
 - **SOMAH PA:** The Intention is for POs to continue TE in the long run, though there is no requirement for them to do continuing education.

- **AC Member:** A train-the-trainer model (the PA training POs to do SOMAH tenant education) would extend our capacity and ensure POs are set up for success in effectively meeting both the spirit and letter of TE requirements beyond a box-checking exercise.
- **SOMAH PA:** The PA recognizes there is limited capacity -- we're just trying to provide support for everyone. In a lot of cases, the PA has seen that contractors are taking on those requirements on behalf of the POs, while the requirement is technically on POs. Train-the-trainer helps bolster capacity.
- **SOMAH PA:** The PA uses a 360-degree curriculum, but this helps clarify that this is a support system if POs want to provide a more robust education process for the residents.
- **CBO Partner:** Reaching out to tenants in eligible properties and teaching them about renewable energy and solar could help show buy-in, interest, and pressure coming from tenants as something they want. We've also been thoughtful about the vulnerability of tenants and want to add other ways that are important to tenants. We are open to any resources or tips you can provide on who the decision-maker is and how to speak to large corporate entities that are out-of-state.

Next Steps/Wrap-up

The Next Advisory Council meeting will be held on April 28th, 2020.