



Q1 Public Forum

March 8, 2023



A Commitment to Equity

SOMAH is dedicated to equity through a community-based approach that amplifies the voices of those most burdened by social and environmental factors and ensures the program listens to and is responsive to the communities it serves. Through public forums, direct outreach and education, connections broaden into community partnerships that further develop SOMAH's inclusiveness and capacity to engage.

Energy and Environmental Justice are in SOMAH's DNA

Created largely by the advocacy efforts of environmental justice groups and funded by greenhouse gas auction revenues through California's Cap-and-Trade Program, SOMAH's work to expand clean energy access to low-income and environmental justice communities in particular has clear restorative and environmental justice implications.



Agenda Overview

1:00 - 1:10 | **Welcome & Introductions**

1:10 - 1:30 | **Session 1: SOMAH Program Update**

- Key program stats and updates
- Q&A/Discussion

1:30 - 2:00 | **Session 2: System Monitoring Program Rollout**

- Intro to system monitoring - why it is needed, the benefits, and how you can get your system monitored
- Q&A/Discussion

2:00 - 2:10 | **Break**

2:10 - 2:50 | **Session 3: SOMAH 2023 Goals & Priorities**

- Priorities and activities planned for 2023
- Q&A/Discussion

2:50 - 2:55 | **Looking Ahead & Next Steps**

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 ten (10) business days
- Additional questions and comments: contact@CalSOMAH.org or (858-244-1177, ext. 5)



Welcome & Introductions

SOMAH Program Administration Team

Program Administration

Jae Berg | SOMAH Program Manager
Chris Walker | SOMAH Program Manager
Hannah Keenan | SOMAH Program Manager
Marisa Villarreal | SOMAH Program Manager
Luke Ballweber | SOMAH Program Manager
Valery Franco | SOMAH Program Coordinator
Victoria Leslie | SOMAH Program Coordinator
Stacey Lee | SOMAH Program Coordinator
Joyce Tang | SOMAH Program Coordinator
Lisa Evenson | SOMAH Program Coordinator

Technical Assistance

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

Workforce Development

Walther Perez | SOMAH Workforce Development Manager
Minerva Defee | SOMAH Workforce Development Manager
Ingrid Murillo | SOMAH Workforce Development Manager

Welcome & Introductions

SOMAH Program Administration Team

Marketing, Education & Outreach

Brittany Chenier | SOMAH ME&O Manager

Vallerie Gonzalez-Byrum | SOMAH ME&O Manager

Poolak Forutanpour | SOMAH ME&O Manager

Margee McDonnell | SOMAH ME&O Manager

Omar Rocha | SOMAH ME&O Coordinator

Lucy Moua | SOMAH ME&O Coordinator

Mai Fang | SOMAH ME&O Coordinator

Alyssa Golinar | SOMAH ME&O Coordinator

Monica de la Cruz | SOMAH ME&O Coordinator

Sarah Salem | SOMAH Senior Tenant Services & CBO Sr. Manager

Sana Sheikholeslami | SOMAH Tenant Services & CBO Specialist

Peter Pierre | SOMAH Tenant Services & CBO Senior Coordinator

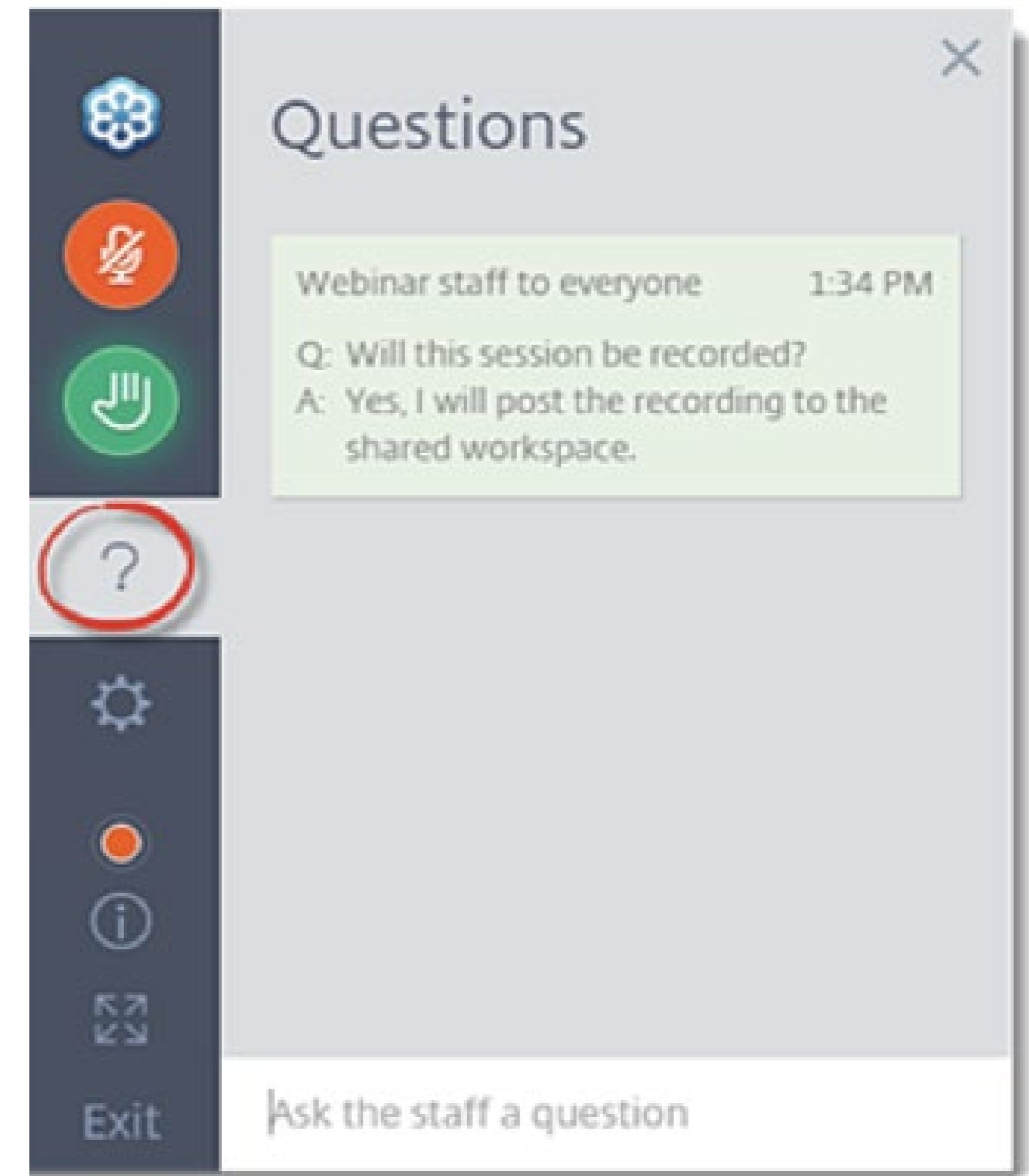
Blanca de la Cruz | Sustainable Housing Program Director, CA Housing Partnership

Rachael Diaz | Sustainable Housing Program Associate, California Housing Partnership

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



Session 1: SOMAH Program Update

Peter Pierre

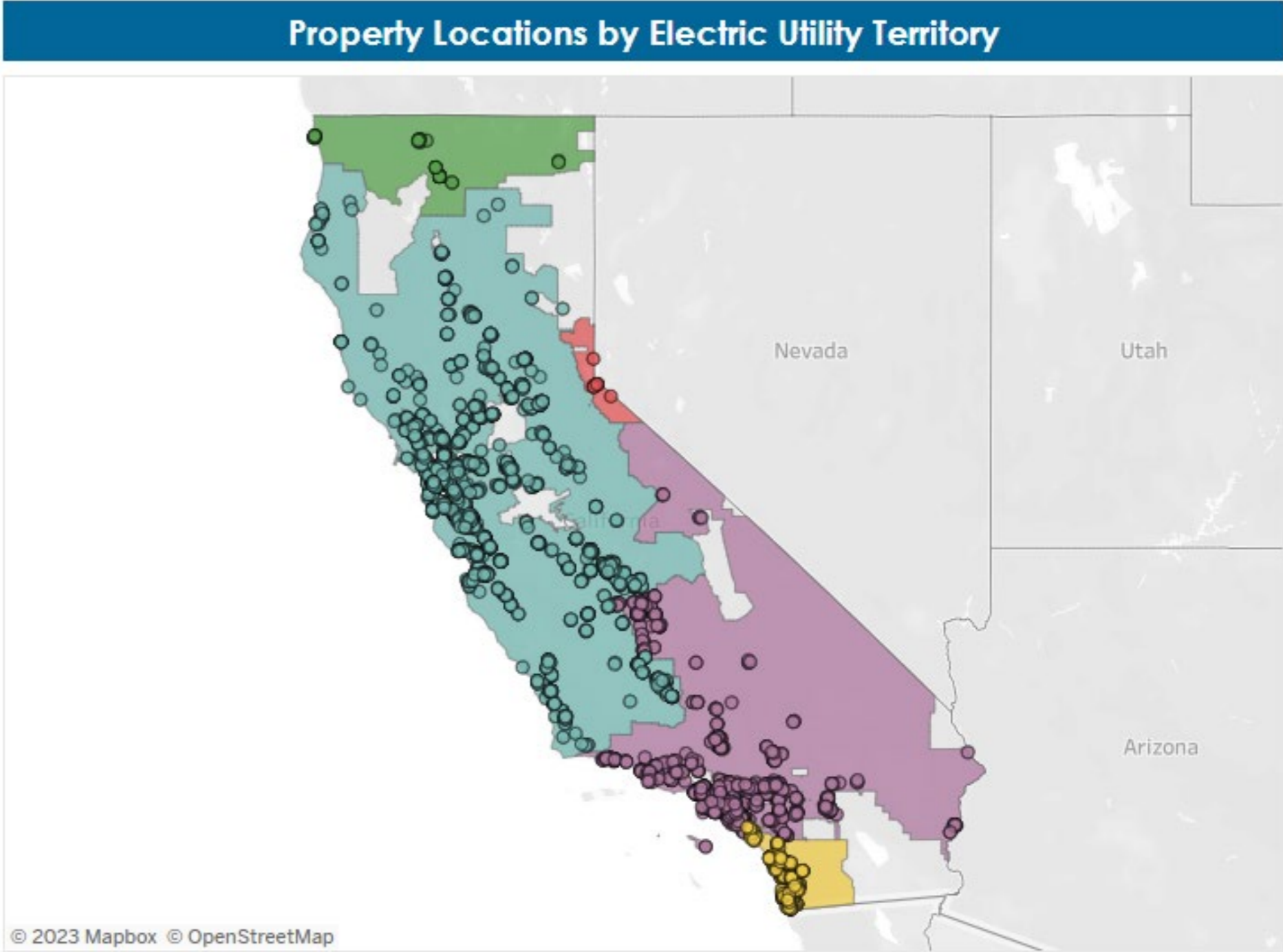
Tenant Services & CBO Partnerships, Sr. Coordinator



Session 1: SOMAH Program Update

Application breakdown

Utility Territory	# of Applications
Pacific Gas & Electric	244
Southern California Edison	140
San Diego Gas & Electric	50
PacifiCorp	0
Liberty Utilities	2
Totals	436



Session 1: SOMAH Program Update

Where We Are Today

All territories are open to new applications with no waitlists

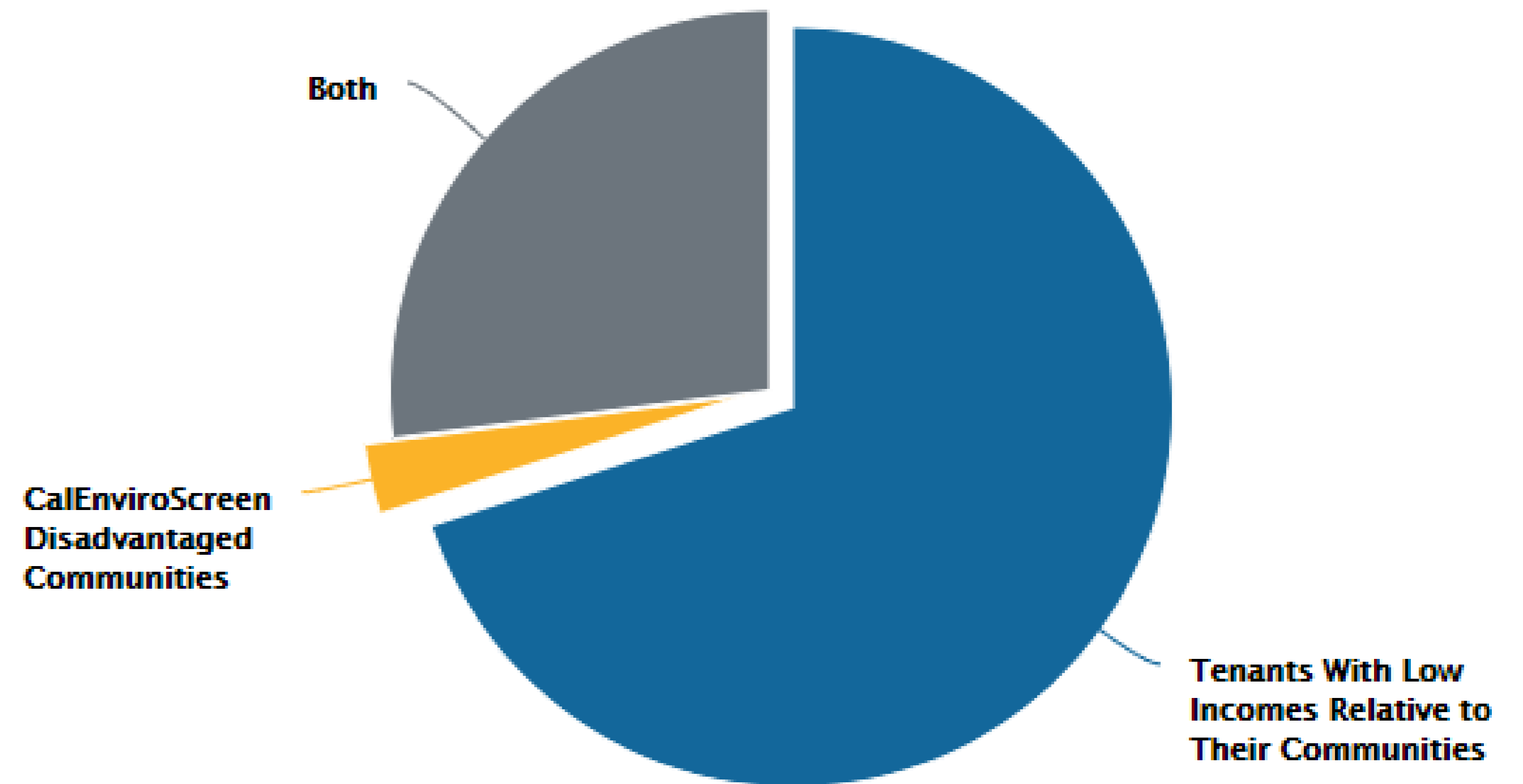
Utility	Available Funding
PG&E	~\$155,828,279
SCE	~\$214,146,871
SDG&E	~\$47,062,478
PacifiCorp	~\$6,882,262
Liberty Utilities	~\$1,872,515

- **\$96.5 million** in funding that's already been reserved
- **\$425.7 million** funding remaining

Session 1: SOMAH Program Update

Where We Are Today

- **32.6%** of SOMAH's active applications are located in Disadvantaged Communities (DACs)*
- Tenants are slated to receive **~86.4%** 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 **34,438** tenant units
- Average system size: **148.41** kW
- 13 participating contractors
 - **16** subcontractors reported
- Pipeline supports **131** job training opportunities
 - **14,030** current training hours
 - Averaging **\$294,630** in current wages
 - Leveraging **4** job training organization relationships



Session 1: SOMAH Program Update

Additional Program Statistics

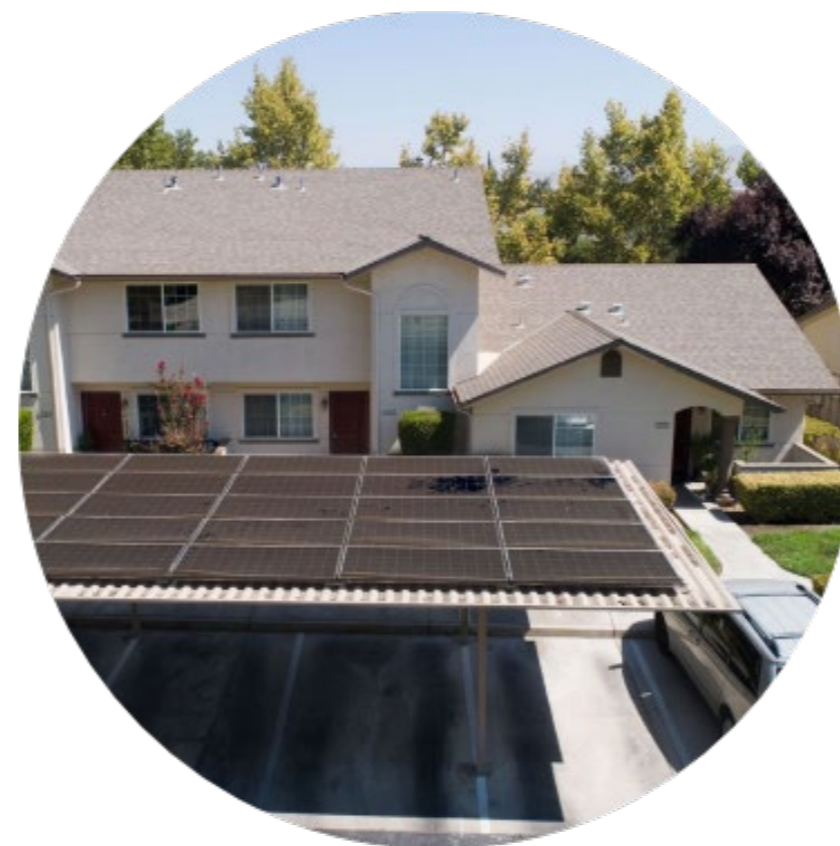
- Progress Payments
 - **62** progress payments approved (\$11.3 M)
 - **0** under review/pending
- Incentive Claims
 - **81** final incentive payments issued (\$21.3 M)
 - **5** close behind at inspection, and pending payment
 - **3** under review/upcoming
- Upcoming activity
 - Q2 ICF due dates: **81 projects**



Session 1: SOMAH Program Update

Completed Projects

82 completed projects, with **13.957** MW of electricity serving over **7,333** tenant units across the state!



Session 1: SOMAH Program Update

Other Program Updates & Announcements

Petition for Modification Update

- Proposed Decision issued 2/10, pending Final Decision
 - Increases current incentive levels and eliminates the annual step-down in incentives established in Decision 17-12-022.
 - Denies the request to enable the SOMAH PA to propose future changes to incentive levels via Advice Letter.
 - Defers addressing the request for a differentiated incentive for properties in DACs, leaving this element to be considered in a forthcoming ruling.

Handbook 6.0

- Advice Letter approved on 3/6
- Full rollout of program updates underway

Session 1: SOMAH Program Update

Other Program Updates & Announcements

Inflation Reduction Act Updates

- Energy Equity Programs released last month – allow bonus tax credits of up to 20%, on top of the baseline clean energy investment tax credit (ITC) of 30%, for projects economically benefiting affordable housing residents, low-income households, EJ communities, and tribal areas.
- LOW INCOME COMMUNITIES BONUS CREDIT PROGRAM:
 - Boost of up to 20% to the ITC for low-income communities
 - 10% increase for solar on low-income communities or tribal lands
 - 20% increase to projects serving low income residential buildings or provide at least 50% of financial benefits of electricity to generated low income households
 - Different MW levels allocated for different categories (low-income, tribal, federally subsidized housing, AMI & benefit conditions) - capped at 1.8 GW/year
- Application will open in 2 phases - **see Department of Energy's Office of Economic Impact & Diversity website for more information.**

Session 1: SOMAH Program Update **Other Program Updates & Announcements**

Tenant Education Service Spotlight

- **Tenant Education Workshop at Maria Alicia Apartments in San Francisco, CA**
 - Coordinated with Mission Housing + Sun Light & Power
 - SOMAH Tenant Education Team and SOMAH CBO Partner, Asian Pacific Environmental Network (APEN) led information session for 15 residents.



Session 1: SOMAH Program Update

SOMAH Resources - Suite of TA & Support Services



TA & Support Services helps you navigate the program and provides:

- Equal access to SOMAH benefits
- Education and access to resources
- Overcome challenging barriers
- Program, technical, and financial support

Contact: TechAssist@CalSOMAH.org

Session 1: SOMAH Program Update

TA & Support Services: SOMAH's Job Training

We support contractors in meeting SOMAH's job training requirements, and trainees in getting connected to solar training opportunities.

What we provide:

- Recruitment and placement support
- Job training portal guidance
- Connection to local job training organizations
- Education and development

Contact: workforce@calsomah.org



Session 1: SOMAH Program Update

TA & Support Services: Tenant Education

Free tenant education support services to help projects reach their tenant education requirements:

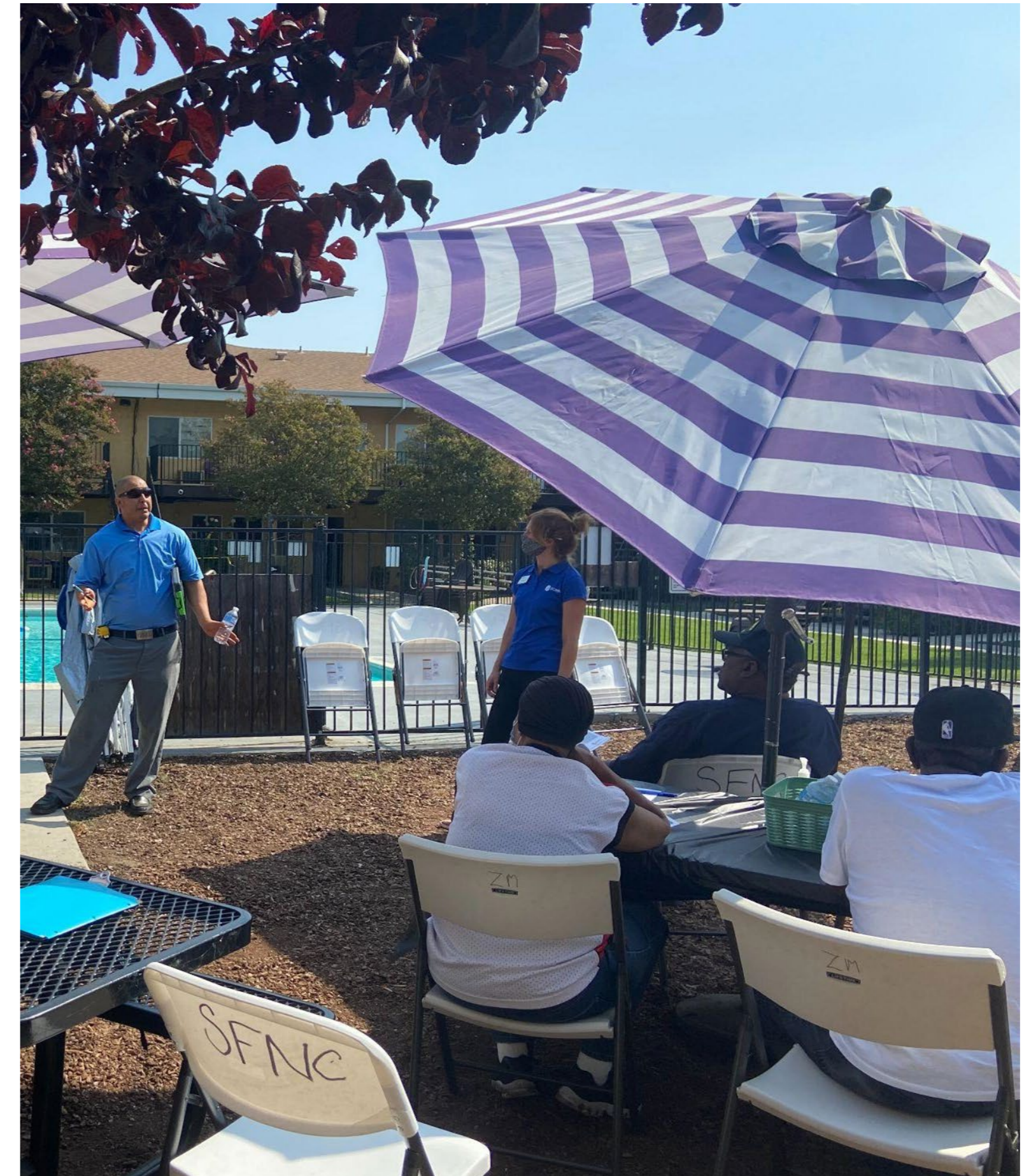
- Tenant Education Service workshops
- Tenant Education “Train the Trainer”
- Tenant Education 101 meeting

Apply now at:

bit.ly/SOMAH-TE-Services

or contact:

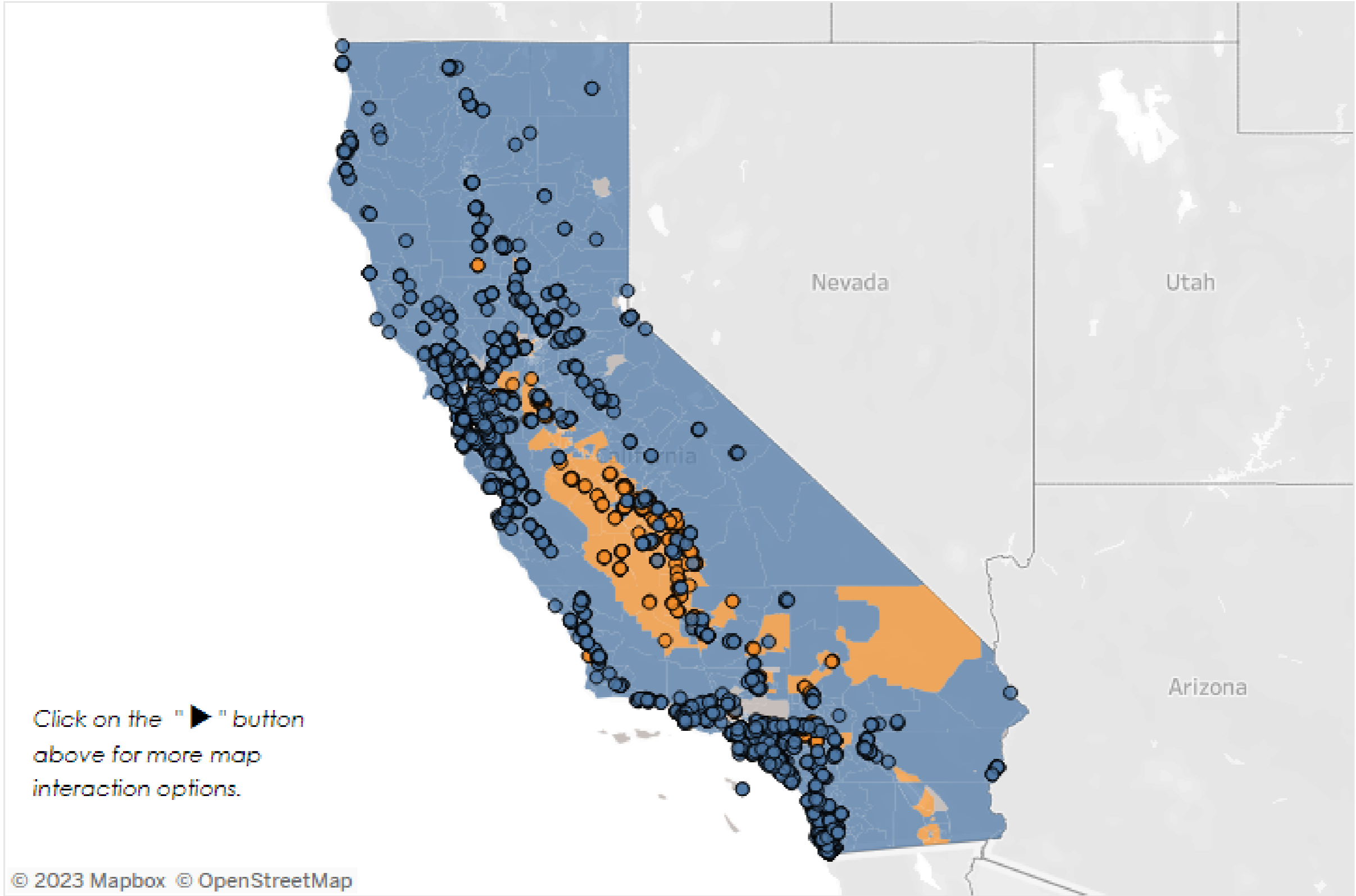
tenants@calsomah.org



Session 1: SOMAH Program Update

SOMAH Resources - Eligible Properties Map

Property Locations by DAC Status

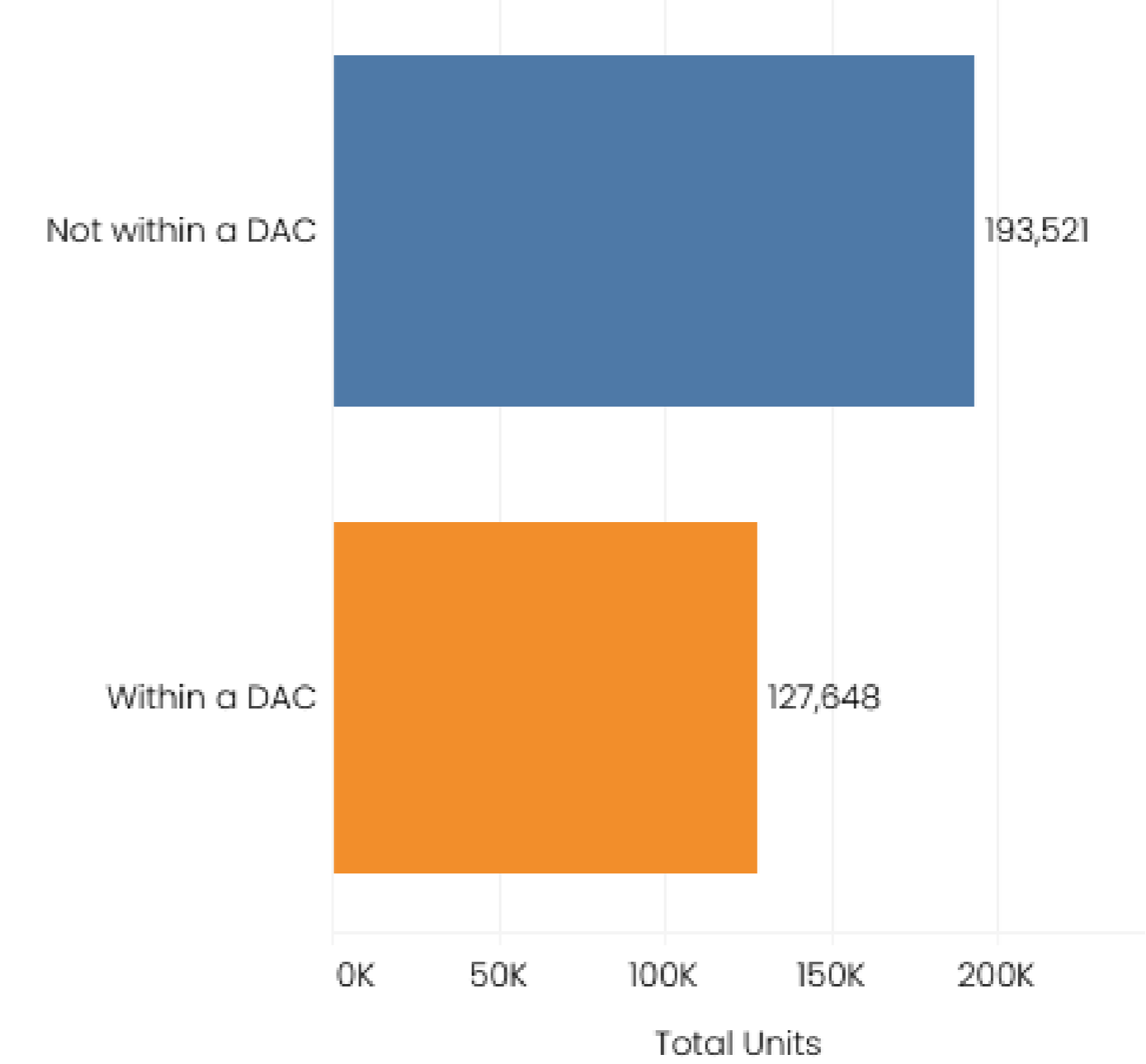


The **Property Locations by [1] Disadvantaged Community Status** map displays the location of properties eligible for the SOMAH program. The color shows details about Disadvantaged Community (DAC) Census Tracts, which are defined based on CalEnviroScreen 4.0 criteria.

Eligible Property Summary

Total Properties: 4,204
 Active SOMAH Properties: 429 (10%)

Total Units by DAC Status



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

Visit: [Calsomah.org/eligible-somah-properties-map](https://calsomah.org/eligible-somah-properties-map)

Session 1: SOMAH Program Update

Updated SOMAH Website

Have you explored the new Calsomah.org?

- With the new easy-to-navigate **Resource Library**, you can search by audience and content type to find just the resources you need
- Check out our completed project toolkit in the **Media Center** and up-to-date program stats and stories on the **Impact Page**

The screenshot displays the SOMAH website interface. At the top, there is a navigation bar with a search field and links for About, Our Partners, FAQs, Contact Us, Events & Webinars, Media Center, and Apply / Login. Below the navigation bar, the SOMAH logo and a circular seal are visible, along with a dropdown menu for Program Resources containing Property Owner, Contractors, Job Seekers, Tenants, and Program Resources. The main content area is titled "PROGRAM RESOURCES" and "Resource Library". It features a search filter for "Your Role" (Property Owner, Contractor, Job Seeker, Partners, Tenant) and "Content Type" (- Any -). A search bar with "SUBMIT" and "RESET" buttons is also present. Three resource cards are displayed: "Energy Auditors" (with a photo of hands writing on a notepad), "SOMAH Program Overview" (with a video thumbnail of houses), and "Property Eligibility Requirements" (with an ebook thumbnail of a woman in a hard hat). Below this, the "ABOUT SOMAH" section is titled "Program Impacts". It includes a quote: "Our partnerships throughout California help us deliver renewable energy and financial benefits to multifamily affordable housing tenants." and a note: "All information is for reserved SOMAH funds or completed projects. This data is updated quarterly. For an in depth look at SOMAH impacts, visit the [Eligible Properties Map](#)." The impact statistics are: 50.75 MEGAWATTS OF SOLAR ENERGY RESERVED (16.9% OF 300 MW GOAL), 335 PROJECTS serving 26,625 TENANT UNITS, and 198 PAID JOB TRAINING OPPORTUNITIES.

Session 1: SOMAH Program Update

Success Stories

Completed Project: Trolley Trestle Apartments

- Located in Chula Vista, CA
- 10 households + community resource center
- 25.6-kilowatt system
- \$48,000 in rebates
- Estimated \$60,000/year in utility savings redirected into supportive programs and services



Watch video of Trolley Trestle's ribbon cutting celebration on SOMAH's Youtube page!

Session 1: SOMAH Program Update Celebrating Completed Projects

We want to celebrate solar!

As more projects complete, the SOMAH PA wants to help you celebrate with a ribbon-cutting ceremony or other event to:

- Highlight bringing solar to your community
- Raise awareness about SOMAH

We can help with planning and promotion.

Contact: media@calsomah.org





Peter Pierre

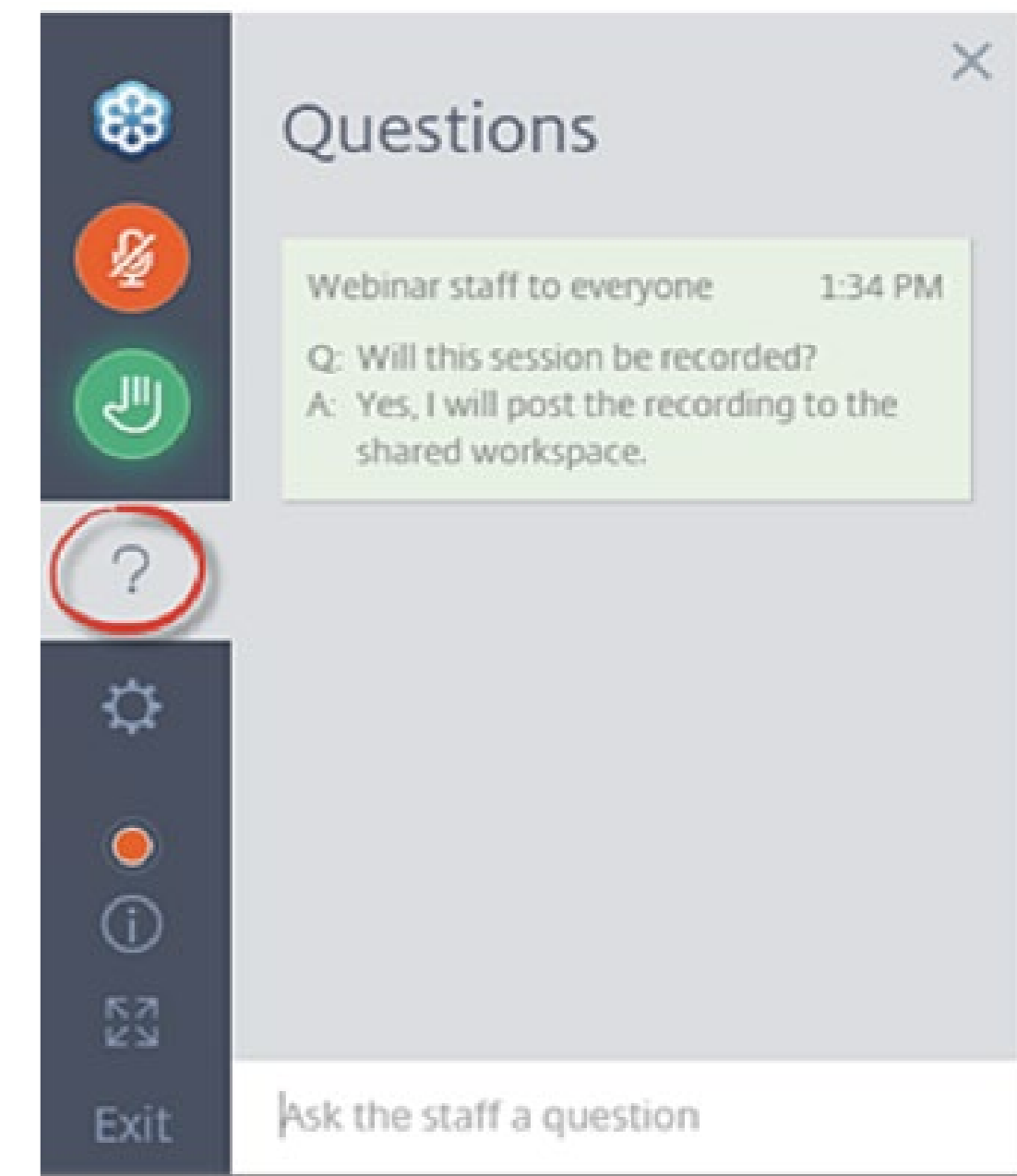
Tenant Services & CBO Partnerships, Sr. Coordinator
510-731-1335

Peterson.Pierre@calsomah.org

Session 1: SOMAH Program Update

Q&A

- Name and organization
- **Verbal** comments and questions
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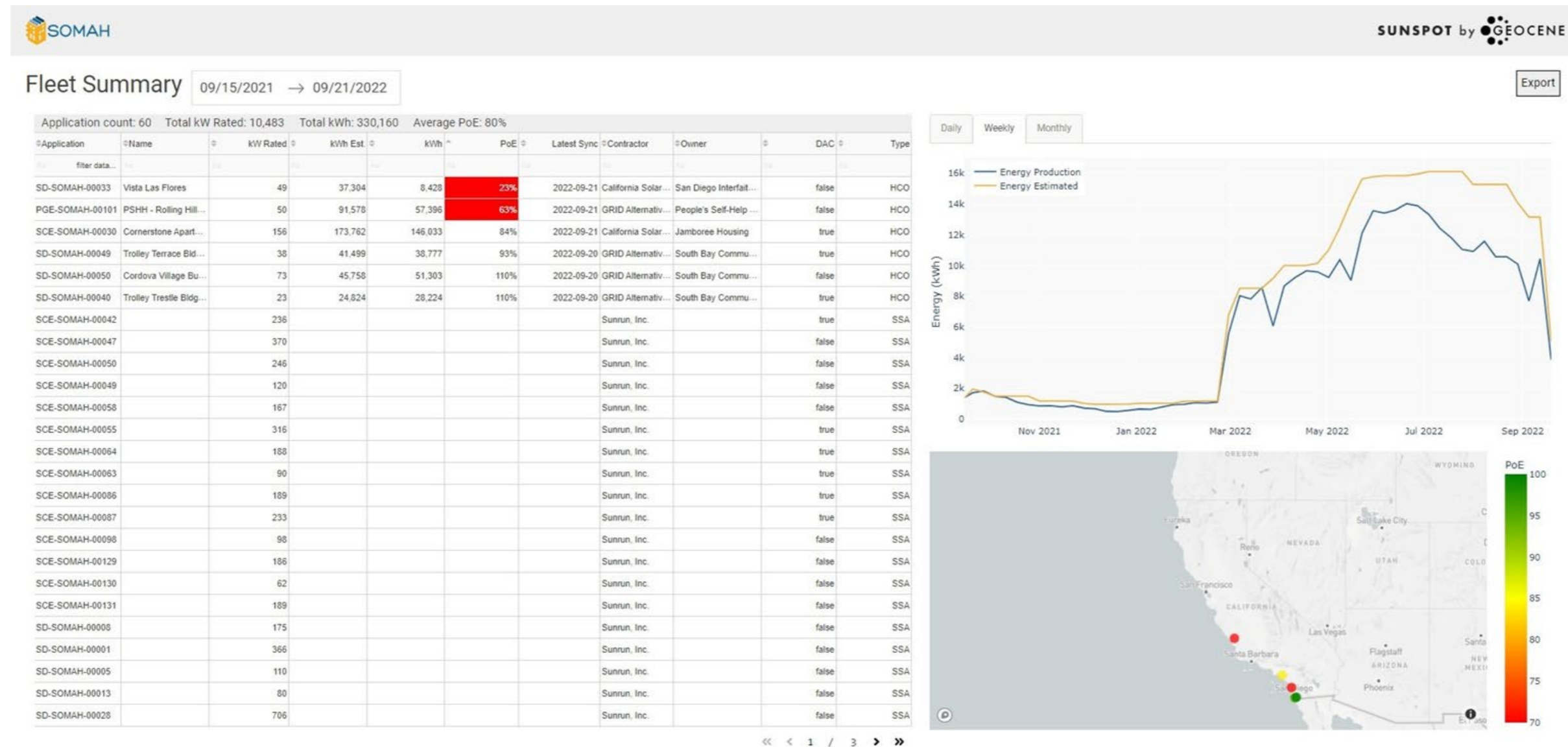
BREAK (5 min)



Session 2: System Monitoring Program Rollout

Staci Givens
SOMAH Program Manager





Agenda

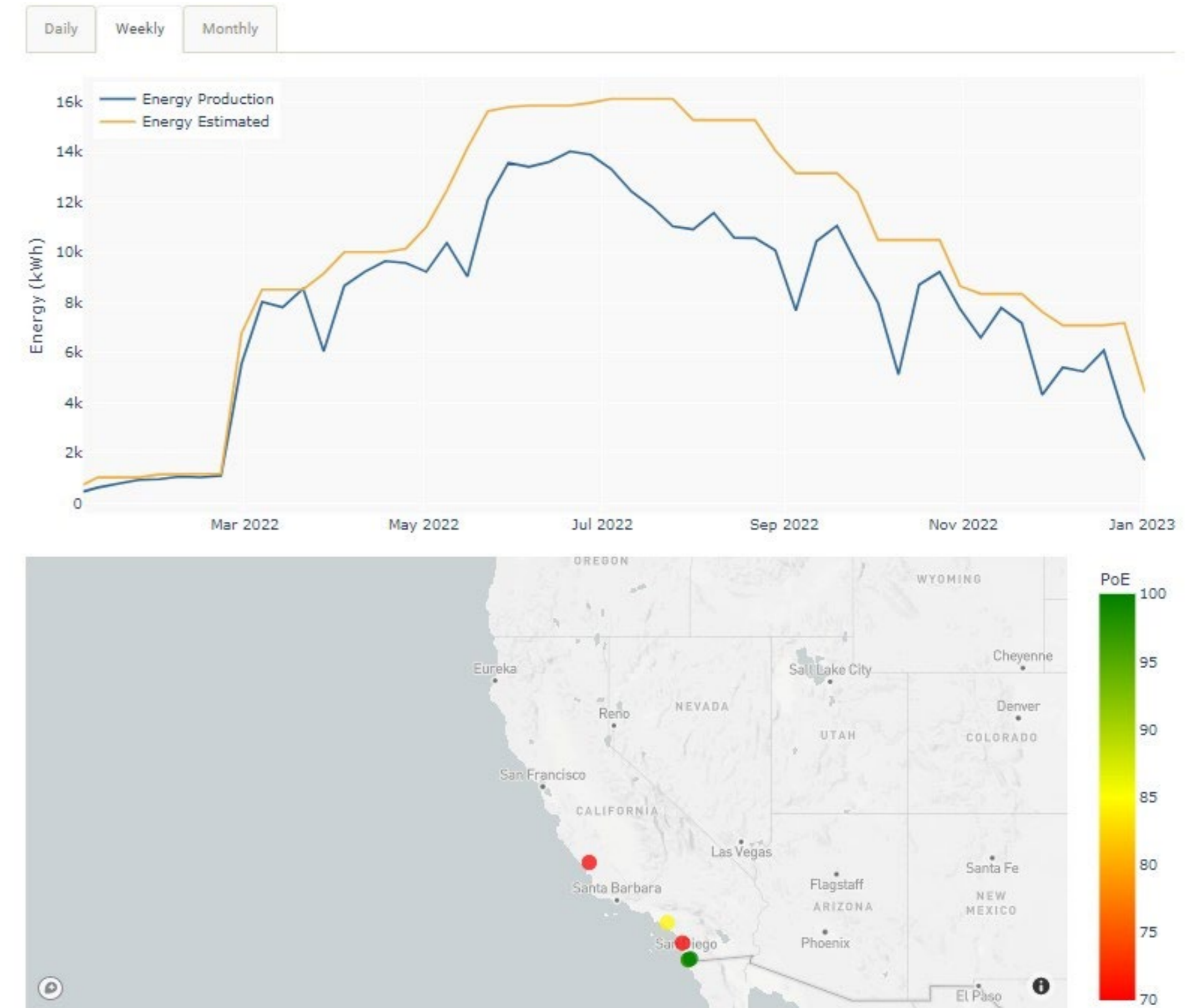
- What is SOMAH fleet monitoring?
- Why do we need it?
- What are the benefits?
- How do I get my system monitored by SOMAH?
- What happens if my system is detected to be underperforming?

Session 2: System Monitoring Program Rollout

What is fleet monitoring?



- An investment in the longevity of SOMAH systems
- Custom-made software called Sun Spot that monitors the performance of all SOMAH incentivized PV systems on a monthly basis with daily data available.
- Helps identify underperforming systems, used to alert property owners and contractors about system status.

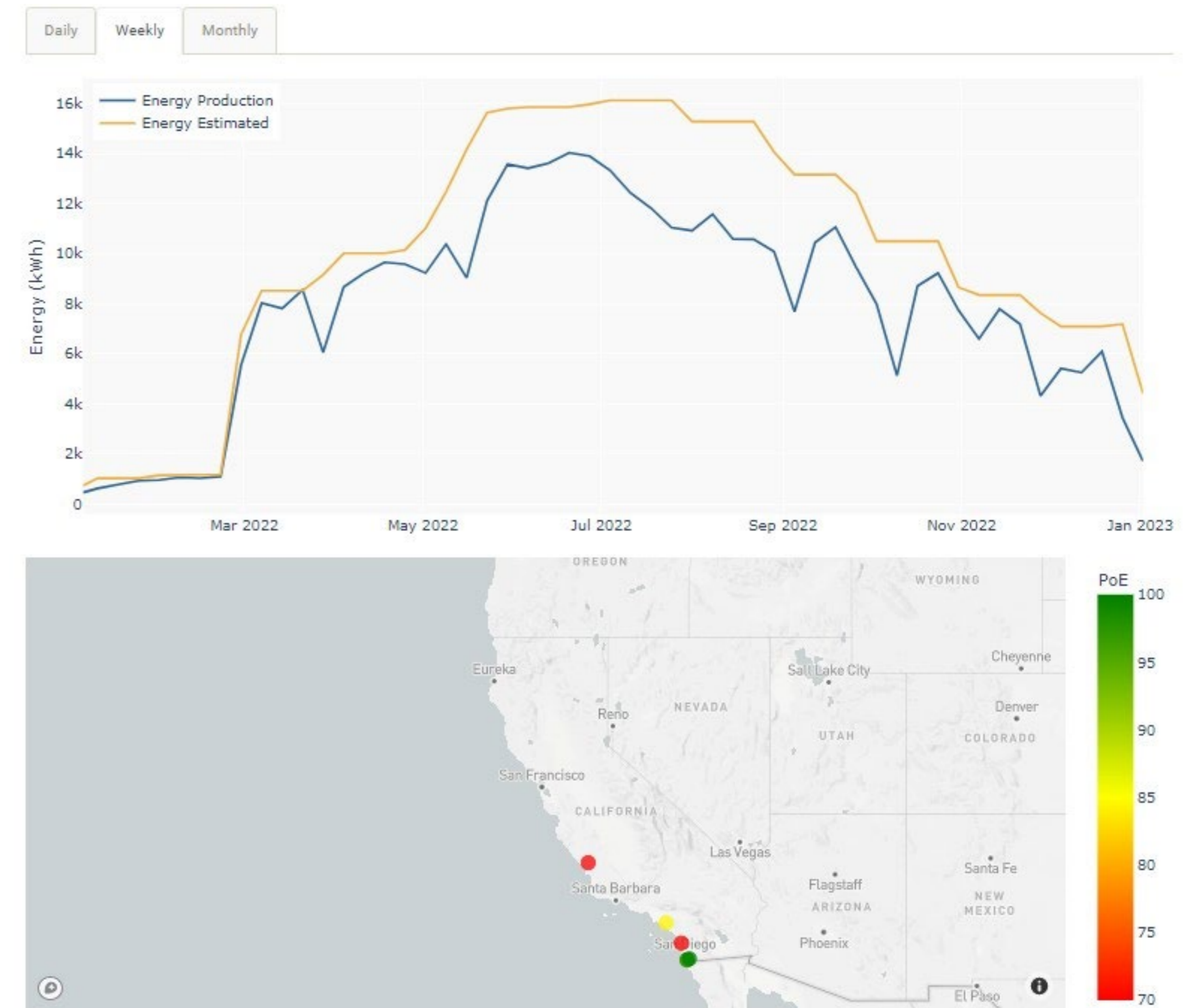


Session 2: System Monitoring Program Rollout

What is fleet monitoring, continued



- SunSpot contains a dashboard with a list of finalized PV systems. Includes expected and actual energy production in kWh.
- This dashboard has a line chart of the estimated aggregated production of all finished SOMAH systems, as well as actual aggregate production.
- The dashboard contains a map of California where underperforming systems are flagged in red



Session 2: System Monitoring Program Rollout

Why do we need it?



- Things can go wrong with the system even when it's well maintained
- Property owners are busy and don't always monitor their systems through the years
- Contractors are also busy doing new installations and may not notice a system is underperforming
- To better understand equipment issues and failures in the solar industry
- To guarantee tenant savings and avoid incentive clawback



Session 2: System Monitoring Program Rollout

SOMAH monitoring requirements



Section 2.3.6.3 of the SOMAH handbook states the monitoring requirements:

- Performance Monitoring and Reporting Service (PMRS) requirements were developed to increase owner knowledge of system performance and foster adequate system maintenance to ensure incentives result in expected levels of solar generation.
- **PMRS is required for all systems.** The System Owner must contract with a PMRS provider for a minimum of 20 years and must ensure that 15-minute interval production data is provided to the SOMAH PA upon request.
- **Applicants must provide 15-minute interval production data** to the SOMAH PA **via login credentials to inverter original equipment manufacturer (OEM)** or equivalent production software at the Incentive Claim Milestone

Session 2: System Monitoring Program Rollout

What are the benefits?



- Confidence that your SOMAH system will be working for at least 20 years
- Peace of mind that tenants will continue receiving their expected financial benefits
- Improving production estimates with real data from hundreds of SOMAH PV systems



Session 2: System Monitoring Program Rollout

What is fleet monitoring not for?



Fleet monitoring does **NOT** replace standard operations and maintenance procedures.

It is the responsibility of the system owner, either the property owner or contractor depending on ownership type, to handle regular maintenance.



How do I get my system monitored by SOMAH?

- **All SOMAH PV systems** are required to report the information needed to monitor the systems in the Incentive Claim Form
- The Incentive Claim Form will have specific instructions for each inverter brand
- For systems that have already been finalized (incentive check received), please contact:
techassist@calsomah.org



How do I get my system monitored by SOMAH?

Information needed in the Incentive Claim Form:

- **Site name(s):** As they appear in the monitoring web portal, there could be more than one per SOMAH application.
- **System ID, site ID or Plant ID number(s):** There could be more than one per SOMAH application.
- **API key:** Not all inverters use them, SolarEdge does.
- **System owner contact information:**
 - Name, Organization, email and phone number of the person registered with the system monitoring provider.

Other information may also be requested and instructions will be provided for each inverter brand

What happens if my system is detected to be underperforming?

- The dashboard will flag systems that are **underperforming by 30% or more** compared to their expected production
- The SOMAH Technical Assistance team will reach out to the system owner contact
- Please update us with any changes in contact information to avoid missing the notifications and trigger an incentive clawback process



Production Requirements and Incentive Clawbacks

If a system is underperforming, the SOMAH PA will send an email to the system owner contact and/or host customer. **It is the responsibility of the system owner contact and/or host customer to respond in a timely manner letting the SOMAH PA know why the system was underperforming and if repairs are expected to be completed and when.**

If we do not hear from the system owner contact and/or host customer within a year, the SOMAH PA may initiate repayment or “clawback” of the SOMAH incentive per section 4.9.4 of the SOMAH handbook. This clawback could be a portion of or all of the paid SOMAH incentive.

Session 2: System Monitoring Program Rollout

Additional Considerations



- No personal identifiable information is extracted from the inverter monitoring portals, only daily energy production in kWh.
- The SOMAH PA reserves the right to request 15 min interval data from your monitoring service as stated in the section 2.3.6.3 of the SOMAH handbook



Session 2: System Monitoring Program Rollout

Next Steps

The SOMAH PA is committed to monitor all SOMAH incentivized systems.

- You'll see changes to the PowerClerk Incentive Claim Form starting **March 9th, 2023**. If your application(s) are already within the Incentive Claim Milestone, click the “promote form” button in PowerClerk.
- For systems that have already been finalized, please contact techassist@calsomah.org
- We may be in touch if you haven't already heard from us



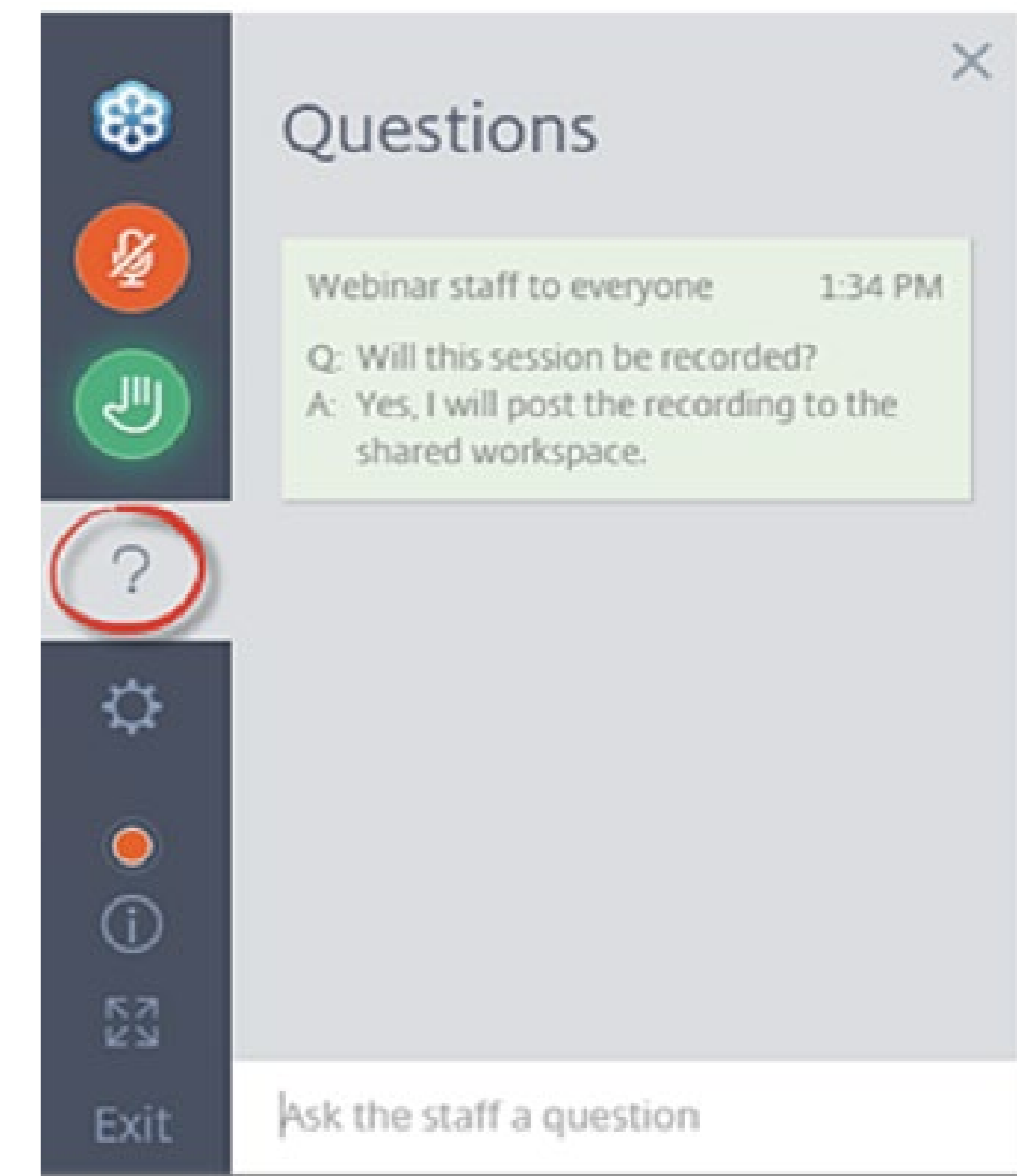
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Session 2: System Monitoring Program Rollout

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Session 3: SOMAH 2023 Goals & Priorities

Hannah Keenan

SOMAH Program Manager

Rachael Diaz

SOMAH Program Manager



Session 3: SOMAH 2023 Goals & Priorities

SOMAH's Program Goals: Overview

- Provide incentives for the installation and interconnection of at least 300 megawatts (MW), of solar generating capacity on qualified multifamily affordable housing statewide by December 31, 2030
- Promote economic development in disadvantaged communities through job training and local hiring initiatives
- Provide maximum direct benefits to tenants, as well as provide tenant education, and promote tenant engagement with the solar project and energy efficiency initiatives

Session 3: SOMAH 2023 Goals & Priorities

Goals for 2023

- **Goal #1:** Continue to increase applications, and build on the momentum and interest in the program.
- **Goal #2:** Measure and increase participation from underserved communities
- **Goal #3:** Increase participant diversity



Goal 1: Increase applications & participants

Goal #1: Continue to drive applications which are **the engine of the program**, from which all other co-benefits and efforts flow. Build on momentum and interest in the program.

#1a - Continue rollout of expanded program services and evaluate to target improvements

#1b - Understand barriers to tribal participation (eligibility, regulatory, administrative, etc.) and direct outreach to tribal properties, to increase participation

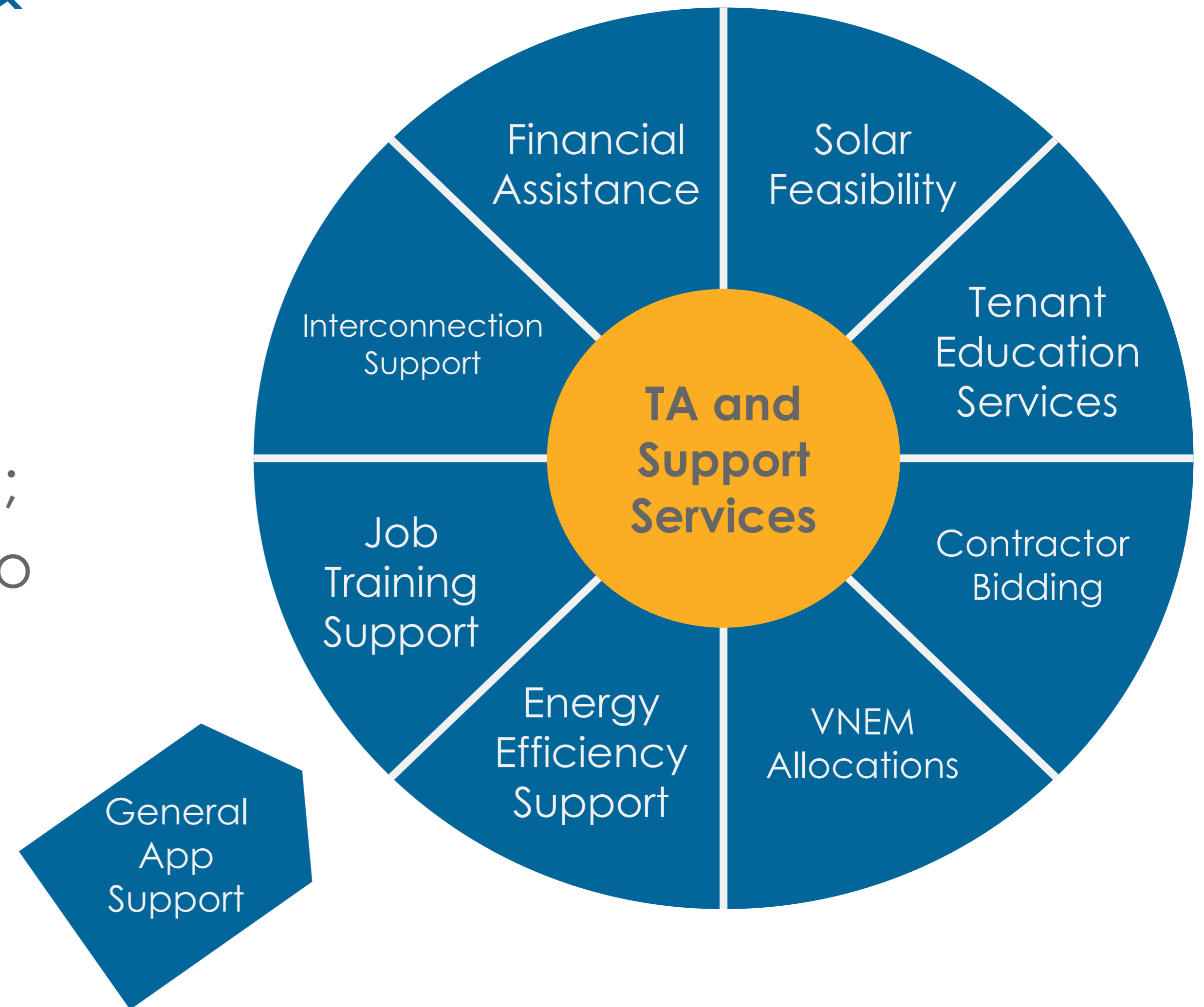
#1c - Continue to foster and grow co-marketing opportunities and relationships

#1d - Share resources and support participants with financial barriers.

#1e - Continue participant research and feedback solicitation

Strategy #1a (and #3a): Expanded program services & evaluate participation

- **TA Goal:** Assist at least 10% of projects by providing objective information and resources that support informed decision-making; or by augmenting their capacity to complete required steps
- Services can be requested on demand throughout project lifecycle



Strategy #1b: Understanding and addressing tribal participation barriers

- Continued training for competency around engaging with Tribal Nations
- Rollout of "Application Resources for Tribal Groups: Documentation of Multifamily Low-Income Housing Eligibility" resource at CalSOMAH.org
- DAC SASH engagement regarding mobile homes, tribal housing stock
- Engage JTO partners that intentionally serve tribal entities or individuals
- Co-marketing
- Participation in tribal convenings
- 1-1 outreach

Strategy #1c: Continue to foster and grow co-marketing relationships and opportunities



- Government entities
 - Local governments, RENs, COGs, RPCs, TCAC
- IOUs
- CBO partnership network
- Tribal partners and agencies serving Tribes
- Affordable housing associations
- Other owners, via storytelling: “case studies,” testimonials, quotes across different contexts, from digital ads to conferences



Strategy #1d: Share resources and support participants with financial barriers

- Research additional funding sources
- Research bridge loan providers
- Research capacity building grant programs and develop co-marketing partnerships
- Connect applicants to technical assistance services such as loan referrals and TA Lite Reports
- Launch email campaign to update subscribers and applicants with cancelled applications about new incentive rates

Strategy #1e: Continue participant research and feedback solicitation

- Continue to deploy participant surveys & evaluate the data
- Analyze 2022 tenant education evaluation findings
- Launch contractor focus groups to identify workforce development needs

Goal 2: Increase participation from underserved communities

Goal #2: Measure and increase participation from underserved communities, through:

#2a - Tribal efforts, targeted efforts from formalized DAC goal, updated incentives (PFM), app deposit waiver for priority groups (DAC and tribal)

#2b - Focused ME&O efforts and CBO partnerships

Strategy #2a:

Increased participation of tribal projects

- Collaborate with Tribal AC members for feedback on marketing strategies and programmatic changes
- Develop relationships with agencies supporting Tribal development (i.e. HCD, HUD, etc.)
- Monitor the development of Tribal grant programs
- Develop and disseminate Tribal-specific marketing materials
- Attend events targeting Tribal leaders (i.e. CCRH, SJVHC, Tribal Roundtable)

Strategy #2b:

Focused ME&O efforts and CBO partnerships



All ME&O work is guided by the annual SOMAH Marketing Education & Outreach Plan

- Direct outreach
- Co-marketing with trusted entities
- Targeted ad campaigns & PR
- CBO Partnerships: Outreach and education for tenants/community members, property owners, and government stakeholders.



Session 3: SOMAH 2023 Goals & Priorities

Goal 3: Increase diversity

Goal #3: Increase participant diversity, through:

#3a - Expanded program services (TA, prescreen, etc.)

#3b - Continued participant research and feedback solicitation

#3c - Focused ME&O efforts, including collaboration with key affordable housing and contractor groups

Strategic Goal #3: Increase participant diversity

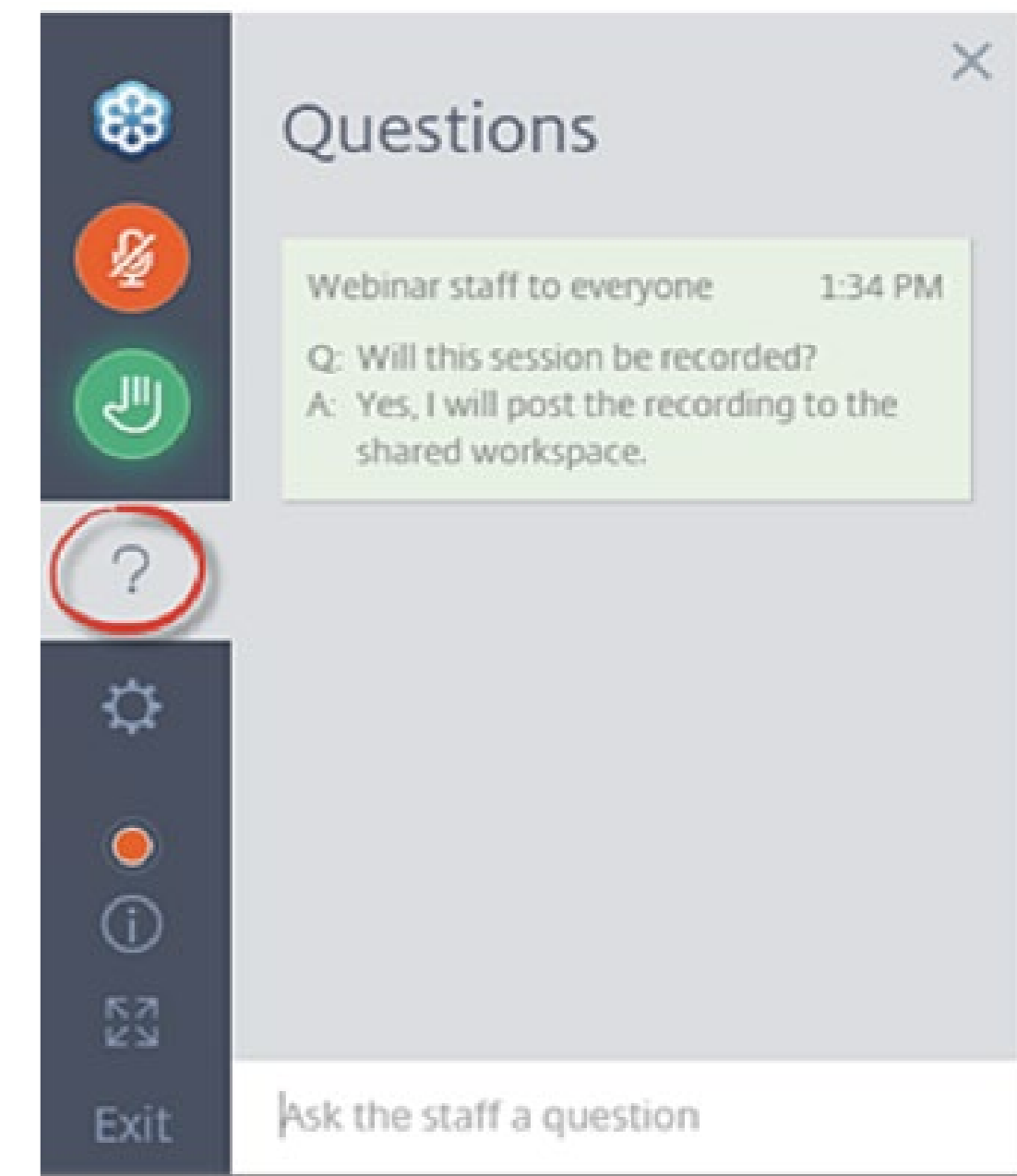
PA plans to increase participant diversity, through the previously discussed strategies:

- **#1a & #3a** - Reevaluate & expand program services
 - Eligibility Pre-Screen
 - Expand on financial TA offerings including referrals to grant programs
 - Housing Authority RFP Assistance
 - Tribal Eligibility Assistance
- **#1e & #3b** - Continued participant research
- **#2b & #3c** - Focused ME&O efforts, including collaboration with key affordable housing and contractor groups

Session 3: SOMAH 2023 Goals & Priorities

Q&A

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Looking Ahead & Next Steps



Looking Ahead & Next Steps

Upcoming Events

- **Mar 15:** Incentives for Financing Clean Energy in Multifamily Affordable Housing
- **Mar 16:** Applicant & Contractor Office Hours: VNEM
- **Apr 6:** Applicant & Contractor Eligibility Training
- **Apr 11:** SOMAH Program & Technical Assistance Services Overview
- **Apr 20:** Tenant Education Training
- **Jun 7:** Q2 Public Forum



Register at calsomah.org/events

Looking Ahead & Next Steps

Share Your SOMAH Experience

Encourage others to get involved!

We're looking for:

- Participants to interview
- Photos from projects
- Stories to tell

Interested in being featured?

Contact: contact@CalSOMAH.org



Looking Ahead & Next Steps

Follow Us!

For the latest news and updates about the program:

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 - [LinkedIn](#) | linkedin.com/company/calsomah



Looking Ahead & Next Steps

What's Next?

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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!