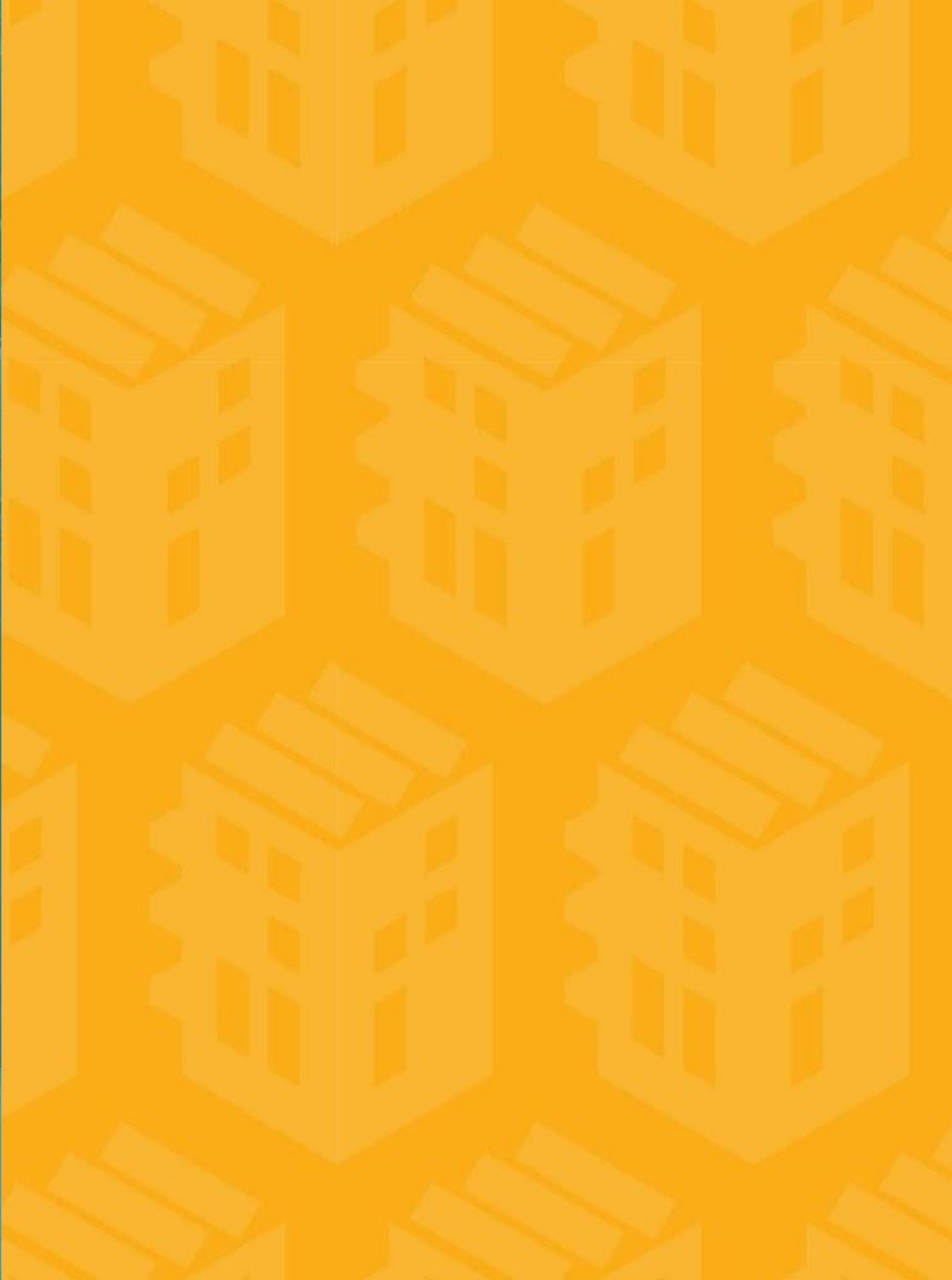




Q1 Public Forum

February 28, 2024



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 - 1:40 | **Session 1: SOMAH Program Update**
 - Key program stats and updates
 - Q&A/Discussion
- 1:40 - 2:10 | **Session 2: Legislation & Policy Updates**
 - Program changes authorized by SB 355
 - Q&A/Discussion
- 2:10 - 2:15 | **Break**
- 2:15 - 2:55 | **Session 3: New Prevailing Wage Requirements**
 - Introduction to AB 2143
 - SURGE website and portal resources
 - Q&A/Discussion
- 2:55 - 3:00 | **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

Hannah Keenan | SOMAH Program Manager

Marisa Villarreal | SOMAH Program Manager

Luke Ballweber | SOMAH Program Manager

Minerva Defee | SOMAH Program Manager

Victoria Blumenfeld | 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 Rivas | SOMAH Program Manager

Trevor Schwartz | SOMAH Energy Project Manager

Luis Amar | SOMAH Technical Assistance Manager

Zara Jamshed | SOMAH Technical Assistance Manager

Workforce Development

Ingrid Murillo | SOMAH Workforce Development Manager

Walther Perez | 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

Alyssa Golinar | SOMAH ME&O Coordinator

Monica de la Cruz | SOMAH ME&O Coordinator

Mariah Birnbaum | SOMAH ME&O Coordinator

Sabryna Barrios | SOMAH ME&O Coordinator

Nicole Munoz-Proulx | SOMAH Tenant Engagement Specialist

Alessandra Gonzales | SOMAH CBO Outreach Manager

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

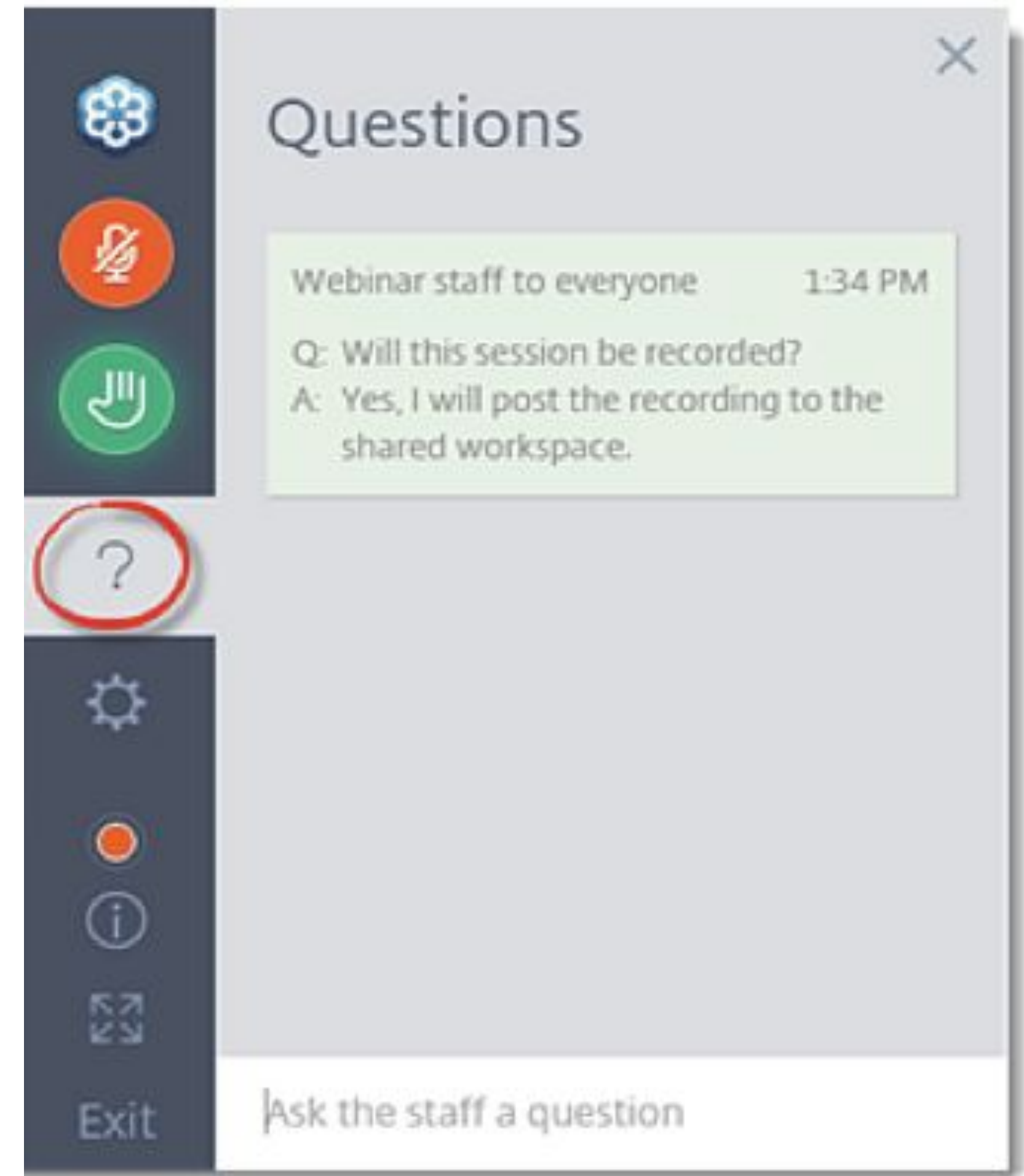
Rachael Diaz | Sustainable Housing Program Associate, California Housing Partnership

Jacqueline Rogge | 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 to write in your comment or question



Session 1: SOMAH Program Update

Lisa Evenson

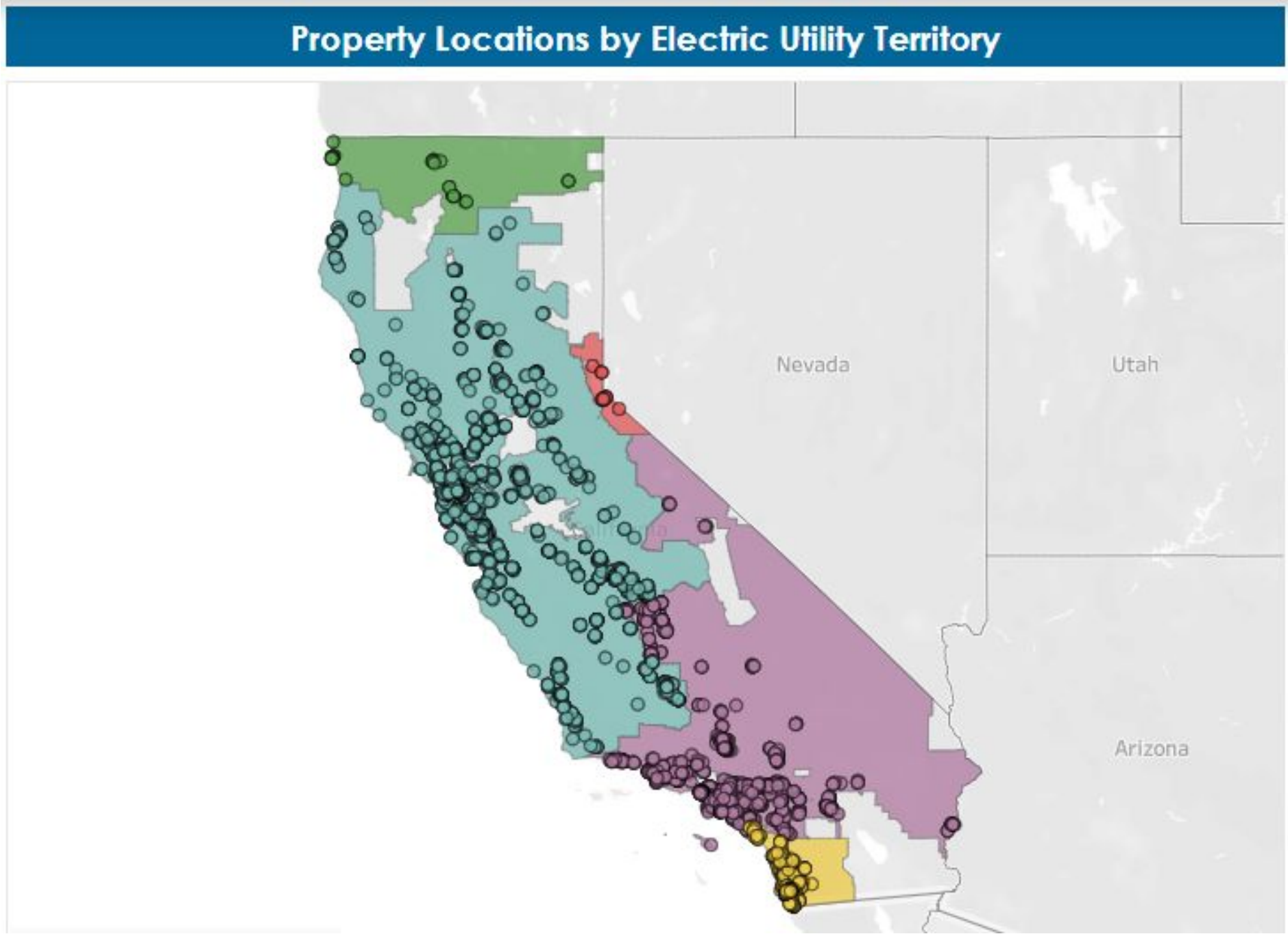
SOMAH Program Coordinator



Session 1: SOMAH Program Update

Application Breakdown

Utility Territory	# of Applications
Pacific Gas & Electric	314
Southern California Edison	146
San Diego Gas & Electric	66
PacifiCorp	0
Liberty Utilities	2
Totals	528



Session 1: SOMAH Program Update

Where We Are Today

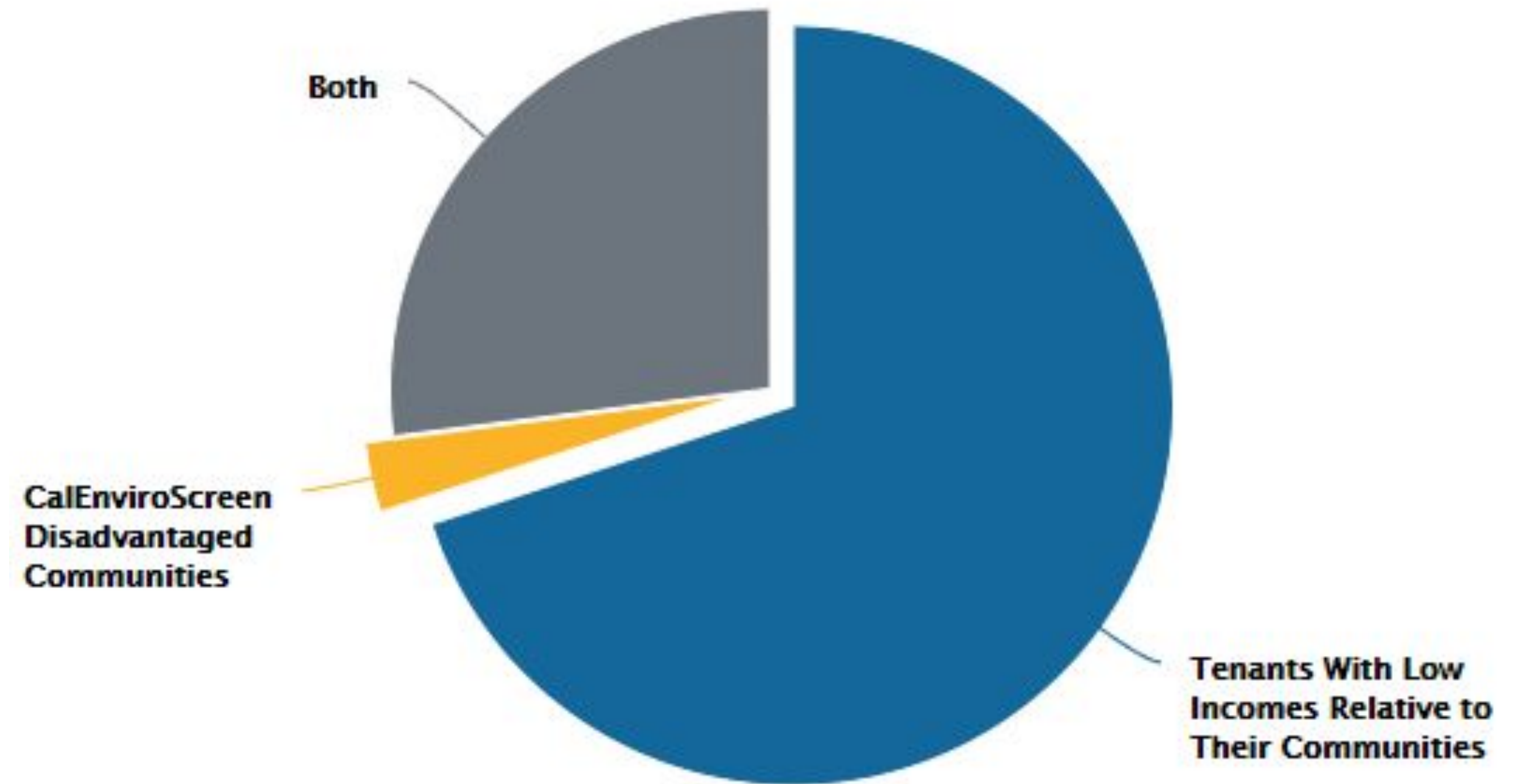
All territories are open to new applications with no waitlists

Utility	Available Funding
PG&E	~\$179,722,924
SCE	~\$252,962,874
SDG&E	~\$58,356,006
PacifiCorp	~\$8,818,512
Liberty Utilities	~\$1,866,103

- **\$103.7 million** in funding that's already been reserved
- **\$501.7 million** in funding remaining

Session 1: SOMAH Program Update **Where We Are Today**

- **30.3%** of SOMAH's active applications are located in Disadvantaged Communities (DACs)*
- Tenants are slated to receive **~84.7%** 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 **39,368** tenant units
- Average system size: **138.9** kW
- **14** participating contractors
 - **28** subcontractors reported
- Pipeline supports **943** job training opportunities
 - **59,240** current training hours
 - Averaging **\$1.27M** in current wages
 - Leveraging **6** job training organization relationships



Session 1: SOMAH Program Update

Additional Program Statistics

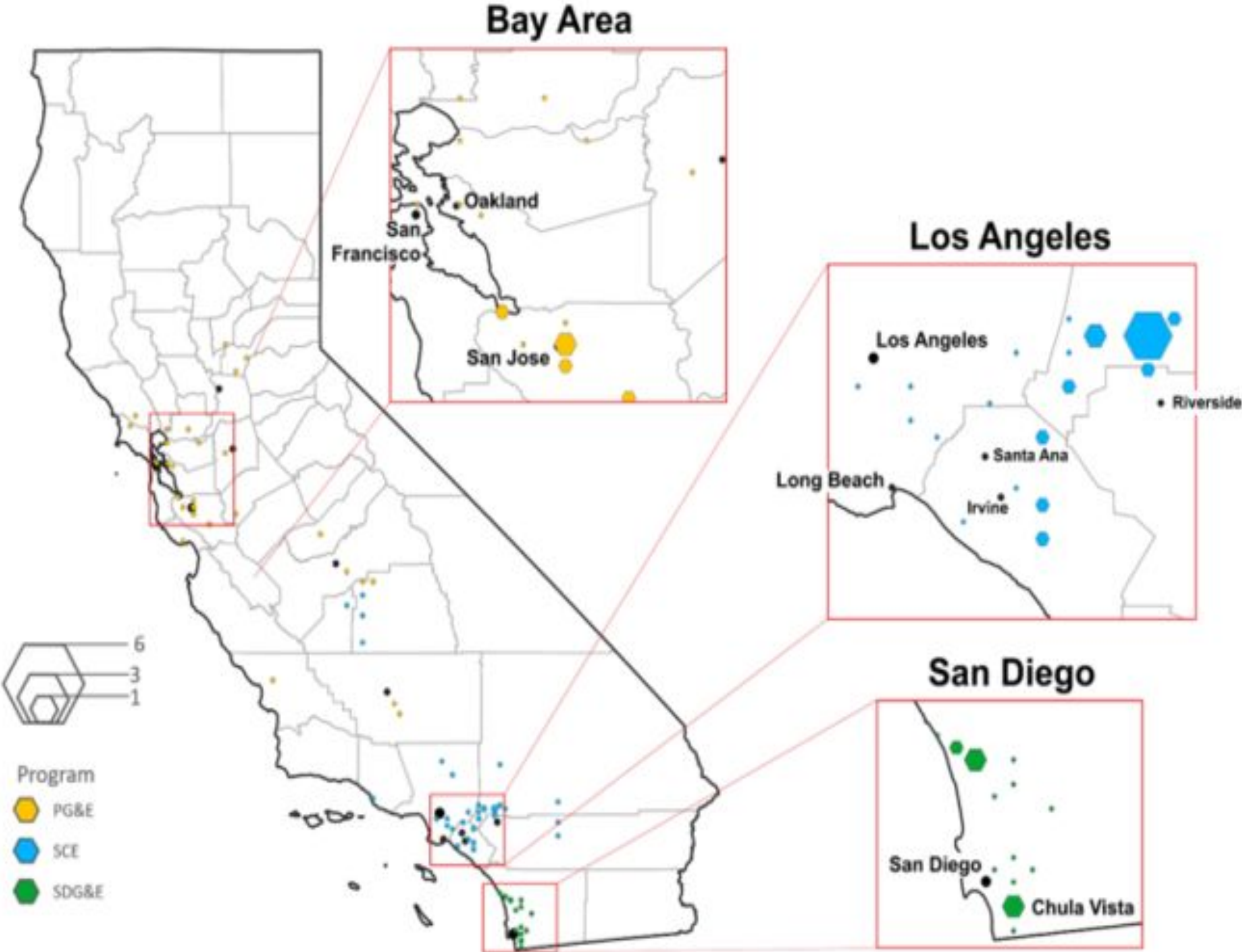
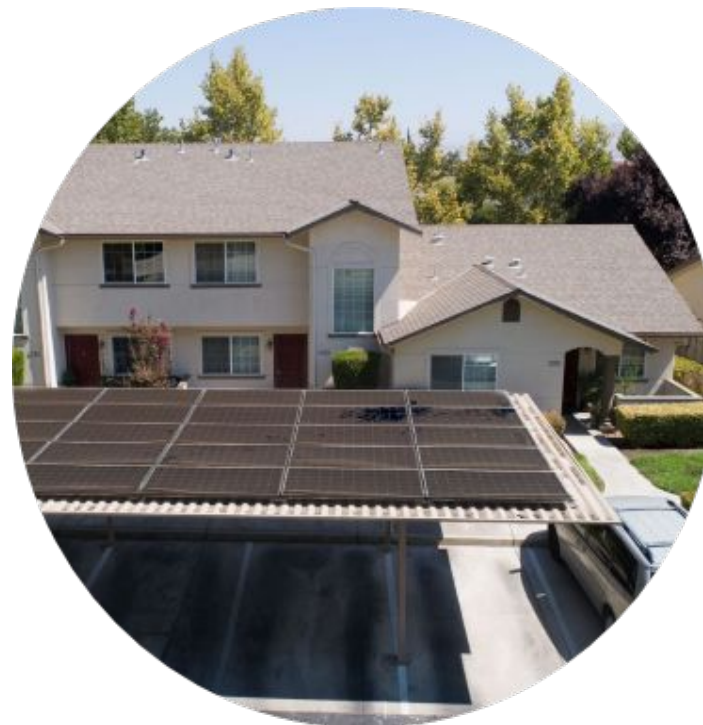
- Progress Payments
 - **149** progress payments approved (**\$25.7 M**)
 - **30** under review/pending
- Incentive Claims
 - **111** final incentive payments issued (**\$35.2 M**)
 - **6** close behind at inspection, and pending payment
 - **3** under review/upcoming
- Upcoming activity
 - Q2 ICF due dates: **79 projects**



Session 1: SOMAH Program Update

Completed Projects

111 completed projects, with **18.24** MW of electricity serving over **10,126** tenant units across the state!

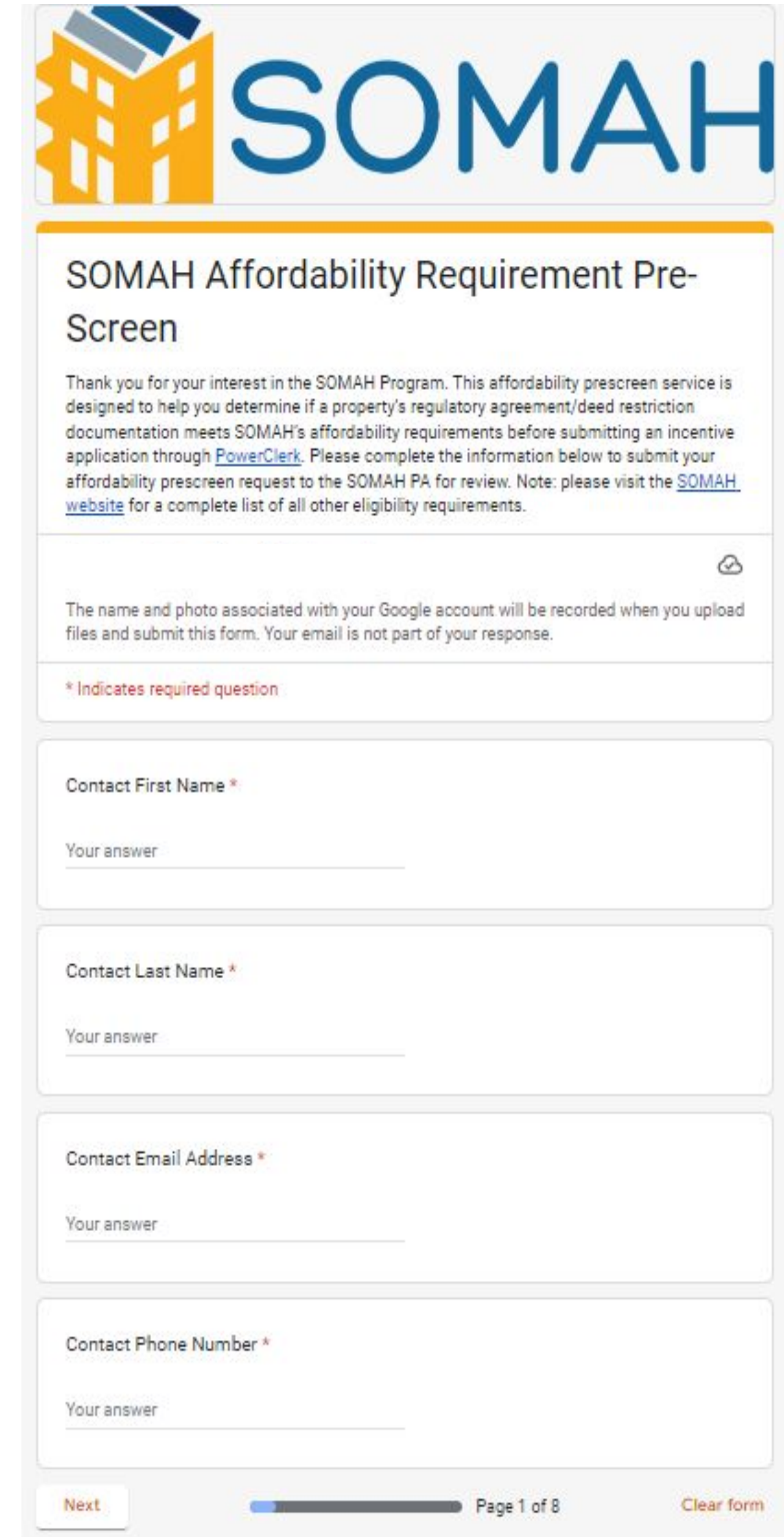


Session 1: SOMAH Program Update

Affordability Prescreen

- Establishes eligibility status of a property's deed restriction/regulatory agreement documentation
- Allows SOMAH PA to provide input as early as possible on the most complicated piece of eligibility to assist with project feasibility planning
- Available to anyone - no program pre-qualifications needed for access!

Visit: <https://calsomah.org/prescreen>



The screenshot shows the SOMAH Affordability Requirement Pre-Screen form. At the top is the SOMAH logo, which consists of a stylized orange and blue building icon followed by the word "SOMAH" in blue. Below the logo is the title "SOMAH Affordability Requirement Pre-Screen". A paragraph of text explains the purpose of the form: "Thank you for your interest in the SOMAH Program. This affordability prescreen service is designed to help you determine if a property's regulatory agreement/deed restriction documentation meets SOMAH's affordability requirements before submitting an incentive application through PowerClerk. Please complete the information below to submit your affordability prescreen request to the SOMAH PA for review. Note: please visit the SOMAH website for a complete list of all other eligibility requirements." Below this text is a small icon of a cloud with an arrow pointing up, indicating a file upload function. A note states: "The name and photo associated with your Google account will be recorded when you upload files and submit this form. Your email is not part of your response." A red asterisk indicates a required question. The form contains five input fields, each with a red asterisk indicating it is required: "Contact First Name", "Contact Last Name", "Contact Email Address", and "Contact Phone Number". Each field has a "Your answer" label and a text input area. At the bottom of the form, there is a "Next" button, a progress bar showing the current page (Page 1 of 8), and a "Clear form" button.

Session 1: SOMAH Program Update Affordability Prescreen (cont.)

Visit: <https://calsomah.org/prescreen>



Apply

Congratulations, and thank you for choosing SOMAH to help with your property's solar project. Applications are accepted through our online portal, PowerClerk, which tracks your project's progress and keeps your paperwork organized in one location. Keep in mind, we're here to assist you throughout the whole process.

Select from one of the following to access the PowerClerk system:

New Users

Select your utility company ▼

APPLY →

Returning Users

Select your utility company ▼

LOGIN →

Affordability Prescreen Request

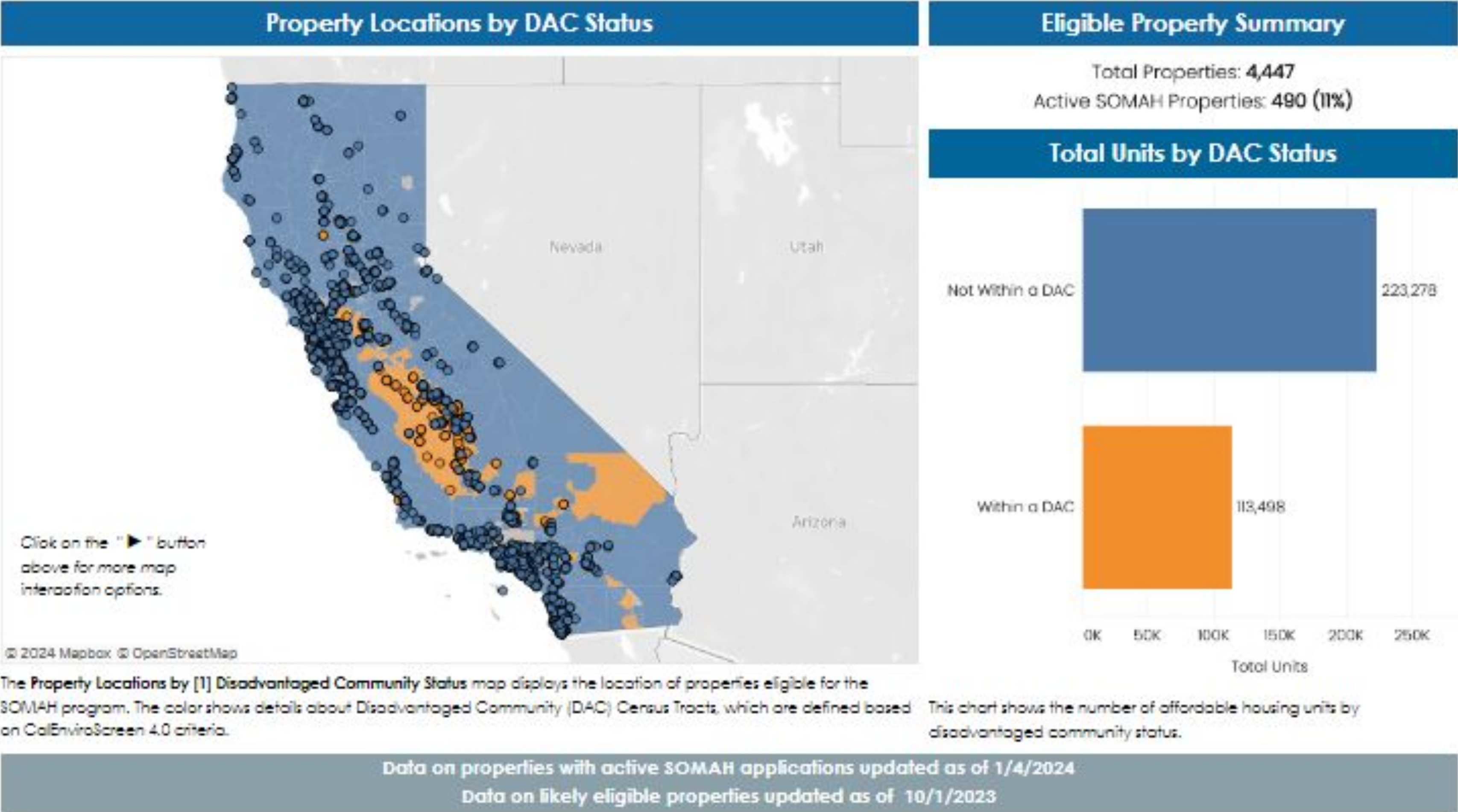
Not sure if your property's deed restriction or regulatory agreement meets SOMAH's eligibility requirements? Take advantage of the **Affordability Prescreen Request** service by submitting a copy of the restriction or regulatory agreement to receive feedback! No formal application is required to use the service. The feedback will culminate in a Notice of Affordability Prescreen Eligibility or Ineligibility. The Notice of Affordability Prescreen Eligibility can be used to streamline future application steps.

Affordability Prescreen Results

<u>Timeframe</u>	<u>Prescreen Count</u>	<u>Eligible</u>	<u>Eligible with Income Affidavit</u>	<u>Ineligible</u>
2023	76	26	13	37
January 2024	1	0	0	1
February 2024 to date	5	1	1	2
Totals	82	27	14	40

Session 1: SOMAH Program Update

SOMAH Resources - Eligible Properties Map



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

Session 1: SOMAH Program Update Other Program Updates & Announcements

Project Spotlight

Bishop Paiute Tribe completes first Tribal SOMAH-funded solar installation!

- Coyote Mountain Apartments
- Bishop, CA
- Ceremony held August 2023
- In partnership with the Bishop Paiute Tribe and GRID Alternatives Inland Empire Office



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

Video Spotlight



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

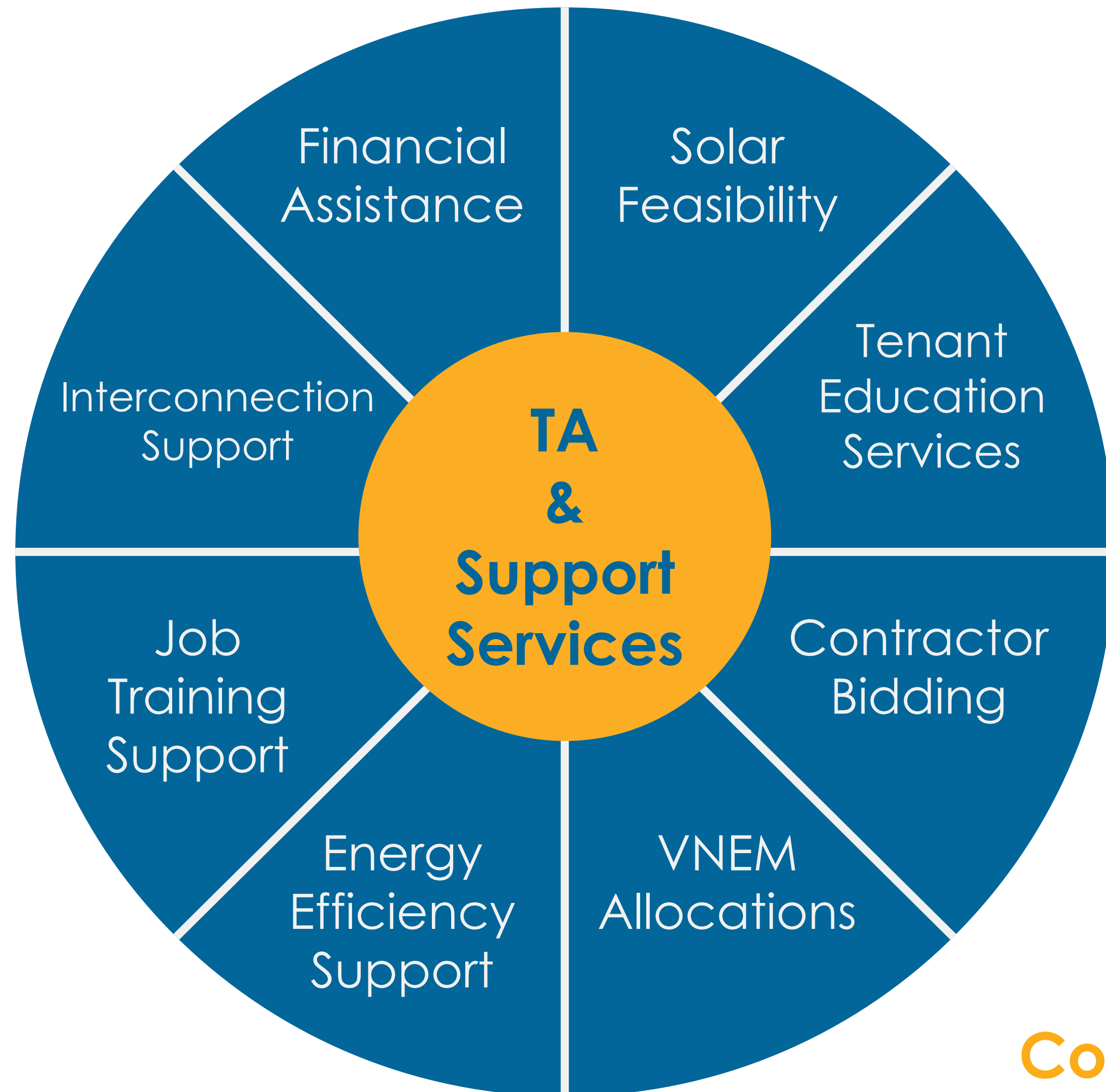
We can help with planning and promotion.

Contact: media@calsomah.org



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
- Support to 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:

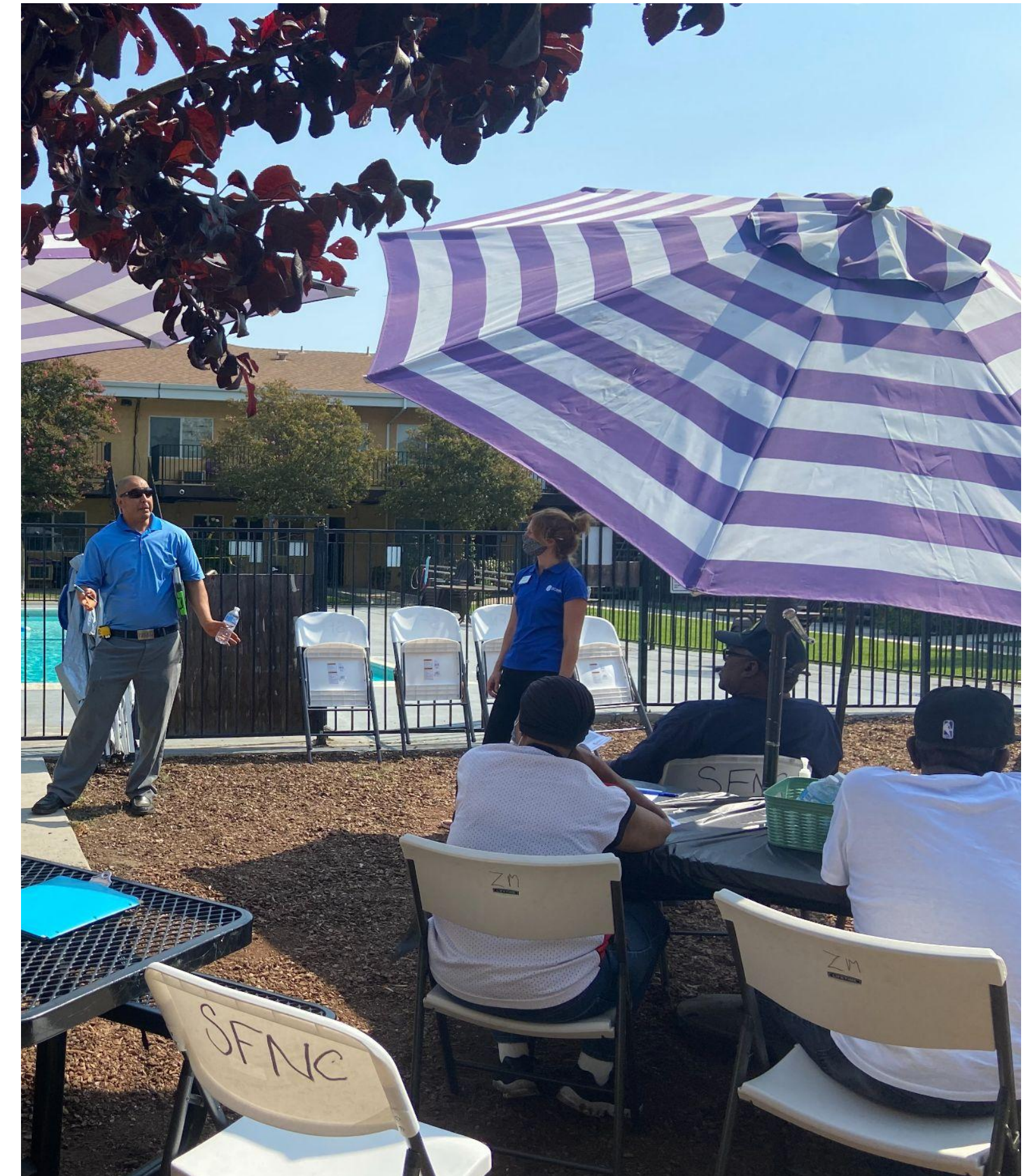
- Tenant Education Service workshops
- Tenant Education “Train the Trainer”
- Tenant Education 101 meeting

Apply now at:

bit.ly/SOMAH-TE-Services

or contact:

tenants@calsomah.org



Session 1: SOMAH Program Update

Open Comments for Contractors

We want to understand the landscape contractors are operating in so we can provide accurate financial analysis through our TA and Support Services.

Equipment pricing trends:

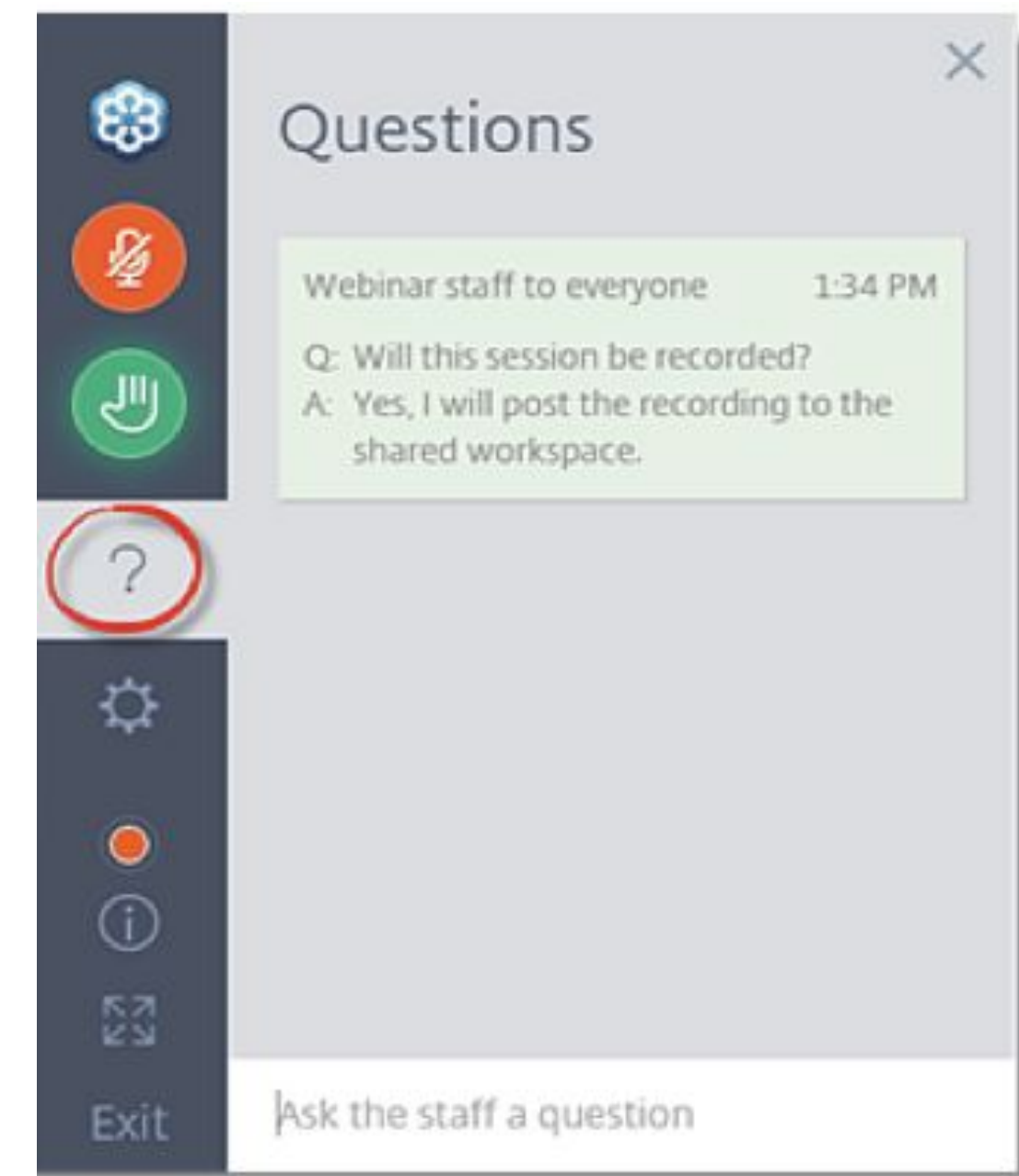
- Are costs higher, lower, or the same compared to last year? By how much?
- What are the additional costs of solar carports? Battery storage?

We'll discuss AB 2143 later in the forum.

Session 1: SOMAH Program Update

Q&A

- Name and organization
- **Verbal** comments and questions
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Session 2: SB 355 & Program Handbook Updates

Luke Ballweber
SOMAH Program Manager



SB 355 & Program Handbook Updates

Session Agenda

- Legislative background
- Handbook 8 overview
- Handbook 8 content modifications: What's in and what's out
- Next steps and what to expect



Session 2: SB 355 & Program Handbook Updates

Background

- **2015:** SOMAH created by legislation, AB 693 (Eggman)
- **2019:** Program launch
- **2019-2023:** 6 handbook editions, two triennial third-party evaluations, two petitions for modification
- **2023:** SB 355 by Senator Susan Talamantes Eggman (D-Stockton)
 - Signed by Governor on **October 7, 2023**
- **2024:** Handbook 8 effective **February 4**

Session 2: SB 355 & Program Handbook Updates **Overview**

- **January 5, 2024:** Submitted Advice Letter to modify Handbook 8 & Program Implementation Plan (PIP)
 - SB 355 Handbook 8 updates and some pending Commission direction
- **Handbook 8:** Approved on February 6, 2024 (effective February 4) and fully implemented on February 15, 2024

Session 2: SB 355 & Program Handbook Updates

Currently active program modifications in Handbook 8

- *Extended program period*
 - ...installed on qualified multifamily affordable housing properties through December 31, ~~2030~~ **2032**
- *Building > property term updated, inclusive of mobile homes*
 - “Qualified multifamily affordable housing property” means a multifamily residential **building property**...

Currently active program modifications in Handbook 8

- *Expanded AMI for income qualification*
 - At least ~~80~~ **66** percent of the households have incomes at or below ~~60~~ **80** percent of the area median income

Session 2: SB 355 & Program Handbook Updates

Currently active program modifications in Handbook 8

- *Additional eligibility pathways for Tribal and Public Housing Authority projects*
 - The property is owned by a tribe.
 - “Tribe” means a California Native American tribe, as defined in Section 21073 of the Public Resources Code.

Currently active program modifications in Handbook 8

- *Additional eligibility pathways for Tribal and Public Housing Authority projects*
 - The property is rental housing property that is owned by one of the following:
 - (i) A public housing authority created pursuant to the Housing Authorities Law (Chapter 1 (commencing with Section 34200) of Part 2 of Division 24 of the Health and Safety Code).
 - (ii) A public housing agency, as defined in Section 1437a of Title 42 of the United States Code.

Session 2: SB 355 & Program Handbook Updates

Not included in Handbook 8 - pending Commission (CPUC) direction

- *Inclusion of **new construction properties** - what is the threshold beyond code that would be eligible for SOMAH*
 - For purposes of the new construction of qualified multifamily affordable housing property, money authorized through the program shall not be used to meet the requirements of Part 6 (commencing with Section 100) of Title 24 of the California Code of Regulations.
- ***Tariff preservation to continue tenant benefits***
 - The Commission shall ensure that electrical corporation tariff structures affecting the low-income tenants participating in the program continue to provide a direct economic benefit from the qualifying solar energy system.
- ***Advanced payment loan** - expanding upfront/incremental payments beyond existing progress payment structure*
 - The Commission may consider authorizing an advance payment loan to an eligible project if there is reasonable evidence to suggest that an advance payment loan would lead to the delivery of a project that would not occur absent the advance payment loan, so long as appropriate funding guarantee and loss recovery mechanisms are implemented to limit the risk of liability to the program from making the advance payment loan. The Commission, in considering an advance payment loan, may prioritize allocating funding to a project where an advance payment loan will have the greatest impact on project delivery.

Session 2: SB 355 & Program Handbook Updates

Next steps and what to expect

- New Handbook 8 is posted
 - <https://calsomah.org/resources/program-handbook>
- Website and PowerClerk updates were implemented February 16
- Affordability Prescreen is up-to-date and accepting prescreen requests
 - <https://calsomah.org/prescreen>
- SOMAH PA to follow up on previously ineligible projects
- **Reminder of what eligibility requirements have NOT changed**
 - 5 rental units
 - Deed restricted for 10 years
 - Customer of participating IOU
 - Individually metered
 - Master-metered properties were not included in SB 355 nor Handbook 8 and remain ineligible.



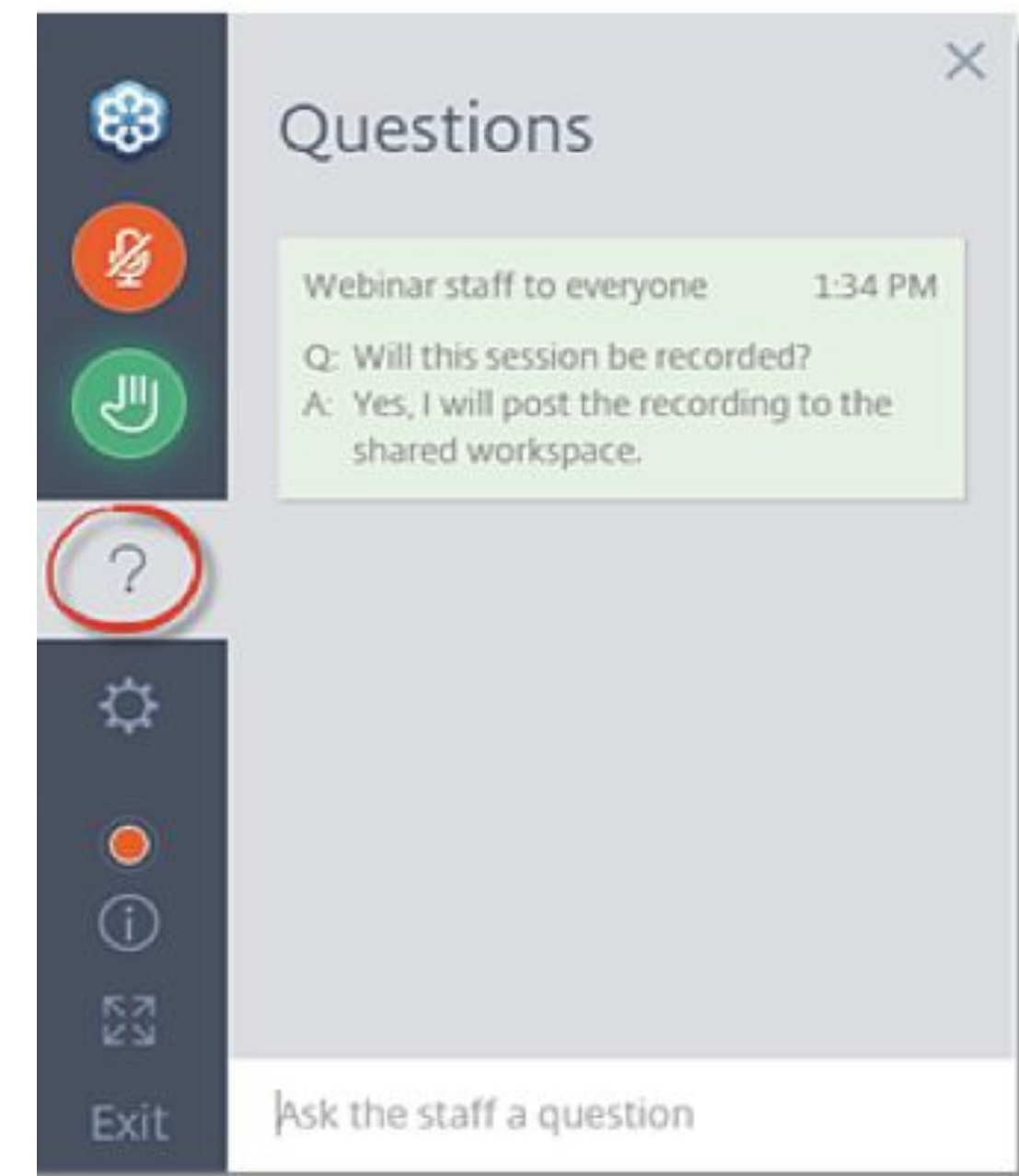
For additional questions, please contact:

contact@calsomah.org

Session 2: SB 355 & Program Handbook Updates

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Session 3: Solar-Utilities Reporting, Guidelines, and Education (SURGE)

AN INITIATIVE SUPPORTING AB 2143 (PUC §769.2)

Sylvia Linn, Christina Salcedo & Brittany Yamagata
SURGE Team Members



SURGE

Solar-Utilities Reporting
Guidance & Education Program

SURGE Team



Sylvia Linn
Project Manager



Christina Salcedo
Senior
Outreach/Marketing
Consultant



Brittany Yamagata
Senior
Outreach/Marketing
Consultant

Session Agenda

- ✓ **Introduction to AB 2143 and PUC §769.2**
 - Project Eligibility
 - What is CA DIR Prevailing Wage?
 - Prevailing Wage Report Information Flow
 - DIR Resources
 - What if a Contractor does not Submit Copies of Certified Payrolls?
 - Interconnection Process Update for IOUs
- ✓ **Introduction to SURGE**
 - Outreach & Education Plan
 - SURGE Website
- ✓ **SURGE Compliance Portal**
 - Contractor Registration
 - Project Registration
 - Payroll Submission



Introduction to AB 2143 & PUC §769.2

Assembly Bill (AB) 2143

- Introduced by Assembly Member Carrillo
- Added Section 769.2 to the Public Utilities Code (PUC)
- Establishes requirements related to prevailing wages for construction workers and apprentices involved in large customer-sited renewable electrical generation (solar) facilities

PUC §769.2

- Pay each construction worker employed in the execution of the work, at minimum, the general prevailing rate of per diem wages
- Maintain and verify payroll records and make those records available for inspection and copying as provided in that section
- Submit biannually, on July 1 and December 31 of each year, to the commission digital copies of its certified payroll records for projects subject to this section

Project Eligibility



Projects qualify as eligible if they involve a customer-sited renewable electrical generation facility, or any associated battery storage, and are **NOT**:

- A residential facility with a maximum generating capacity of 15 kW or less or installed on a single-family home.
- A project already classified as a public work under existing law.
- Facilities serving only a modular home, a modular home community, or multi-unit housing with 2 or fewer stories.

Interconnection Process Update for Investor-Owned Utilities (IOU)

- **Interconnection application is the first point of contact between the customer and Utility, appropriate starting point to determine applicability of the statute**
- **Utility Interconnection Application Responsibilities under AB 2143**
 - Create a Public Utilities Code § 769.2 Checklist to provide for an assessment of whether the requirements are applicable to a project
 - Conduct a review of this checklist to confirm a project's applicability
 - Create a Prevailing Wage Disclosure Form (Disclosure Form) and require eligible customers to acknowledge receipt of this disclosure as part of the interconnection application
- **All contractors, which include the Prime and lower-tier subcontractors, working on eligible projects are subject to meet the requirements of AB 2143 (PUC §769.2)**

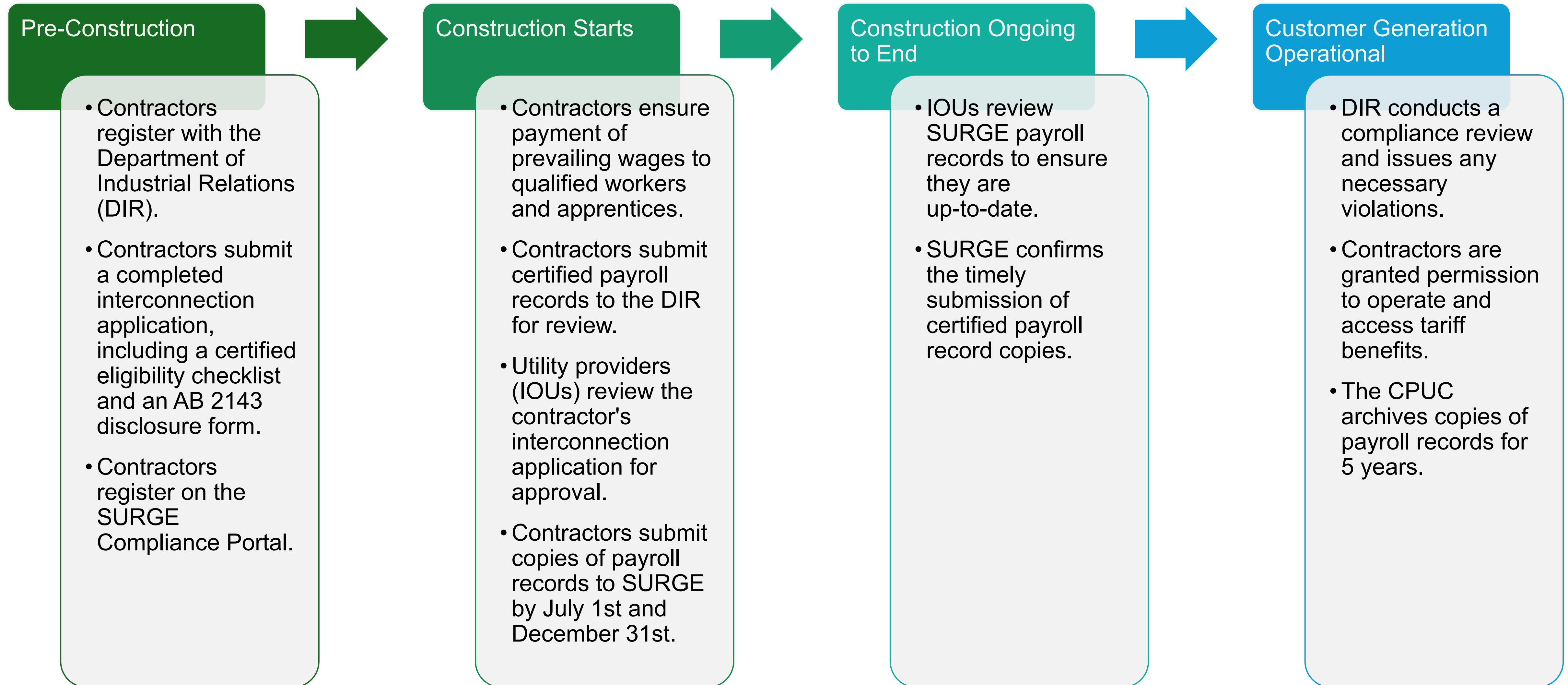
What is California DIR Prevailing Wage?

California prevailing wage is the minimum wage rate that must be paid to workers on public works projects.

The prevailing wage rate is determined by the Director of the Department of Industrial Relations (DIR) and is based on the type of work (craft/classification) and location of project.

The prevailing wage rate is usually based on collective bargaining agreements.

Prevailing Wage Report Information Flow



What if a Contractor does not Submit Copies of Certified Payroll?

If a contractor does not submit copies of certified payrolls by the biannual due dates, enforcement action can proceed as follows:

1. Labor Commissioner of the DIR can enforce through issuance of civil wage and penalty assessment
2. Through an underpaid construction worker or apprentice through an administrative complaint or civil action
3. Through a joint labor-management committee via a civil action



When any of the mentioned parties enforce requirements against a contractor of an eligible and interconnected project, then the Generation Facility will lose service to the standard contract or tariff offered pursuant to Public Utilities Code §2827 or §2827.1.

DIR Resources

- ✓ DIR General Website
<https://www.dir.ca.gov/>
- ✓ DIR Public Works Resources
[Public Works \(ca.gov\)](https://www.dir.ca.gov/PublicWorks)
- ✓ DIR Prevailing Wage Determinations and Classifications
<https://www.dir.ca.gov/oprl/DPreWageDetermination.htm>



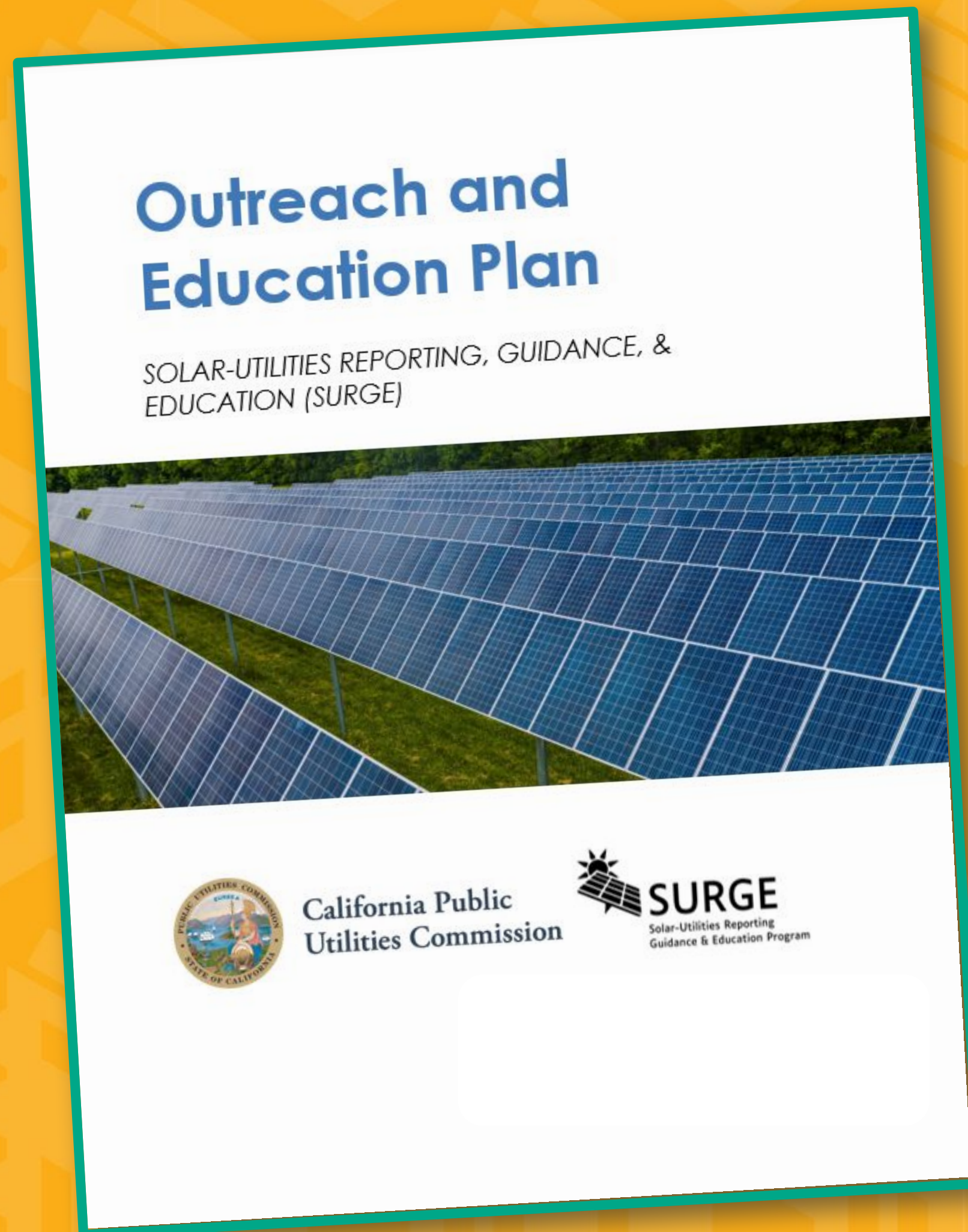
Introduction to SURGE

- ✓ **SURGE or Solar-Utilities Reporting Guidance and Education** is an initiative directed by the California Public Utilities Commission (CPUC) to:
 - Develop a system to collect copies of certified payroll records of prevailing wages from renewable electrical generation facilities or any associated battery storage projects
 - Provide outreach and education to contractors on when and how to submit copies of certified payroll records



Outreach and Education Plan

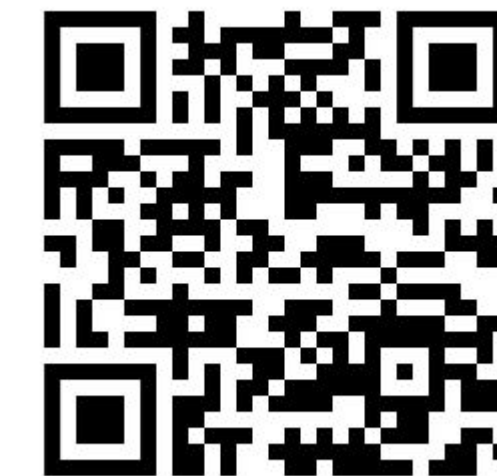
- Outlines the activities to inform and educate contractors, firms, and other stakeholders who are impacted by AB 2143 and PUC §769.2
- Includes outreach and education strategies to share information about certified payroll submittal requirements



SURGE Website

- Part of the SURGE Outreach and Education Plan
- One stop-hub for SURGE information, resources, and guidance for contractors
- Main goal is to help contractors navigate renewable energy compliance with ease
- Feedback from contractors and stakeholders needed for continuous improvement

Review the website and give us feedback using this QR code.



www.cpucsurge.org

SURGE Compliance Portal

1

Contractor Registration (Active)

To get started with SURGE, all Prime Contractors & Subcontractors will need to complete the Contractor Registration form.

2

Project Registration (Active)

Prime Contractors are responsible for registering their eligible projects on the SURGE Compliance Portal. Upon completion of the Project Registration, Primes will need to share the Project Identification Number (PIN) with their Subcontractors on the project.

3

Payroll Submission (Coming Soon)

All Prime Contractors & Subcontractors are responsible for submitting certified payroll records by the deadlines on July 1st and December 31st.

SURGE Compliance Portal



Welcome to the Solar-Utilities Reporting Guidance and Education (SURGE) Compliance Portal!

Please follow the steps listed below:

- **Step 1:** Please register as a contractor for the SURGE Compliance Program.
- **Step 2:** If you currently have an eligible project, proceed to the SURGE Project Registration Form and complete the eligibility requirement questions.
- **Step 3:** Once you have confirmed your project's eligibility, please proceed with registering your project using the SURGE Project Registration Form.
- **Step 4:** When you are ready to submit payroll, proceed to the Payroll Submission Form (coming soon).



SURGE

Solar-Utilities Reporting
Guidance & Education Program

Call Us

800-549-2143

Email Us

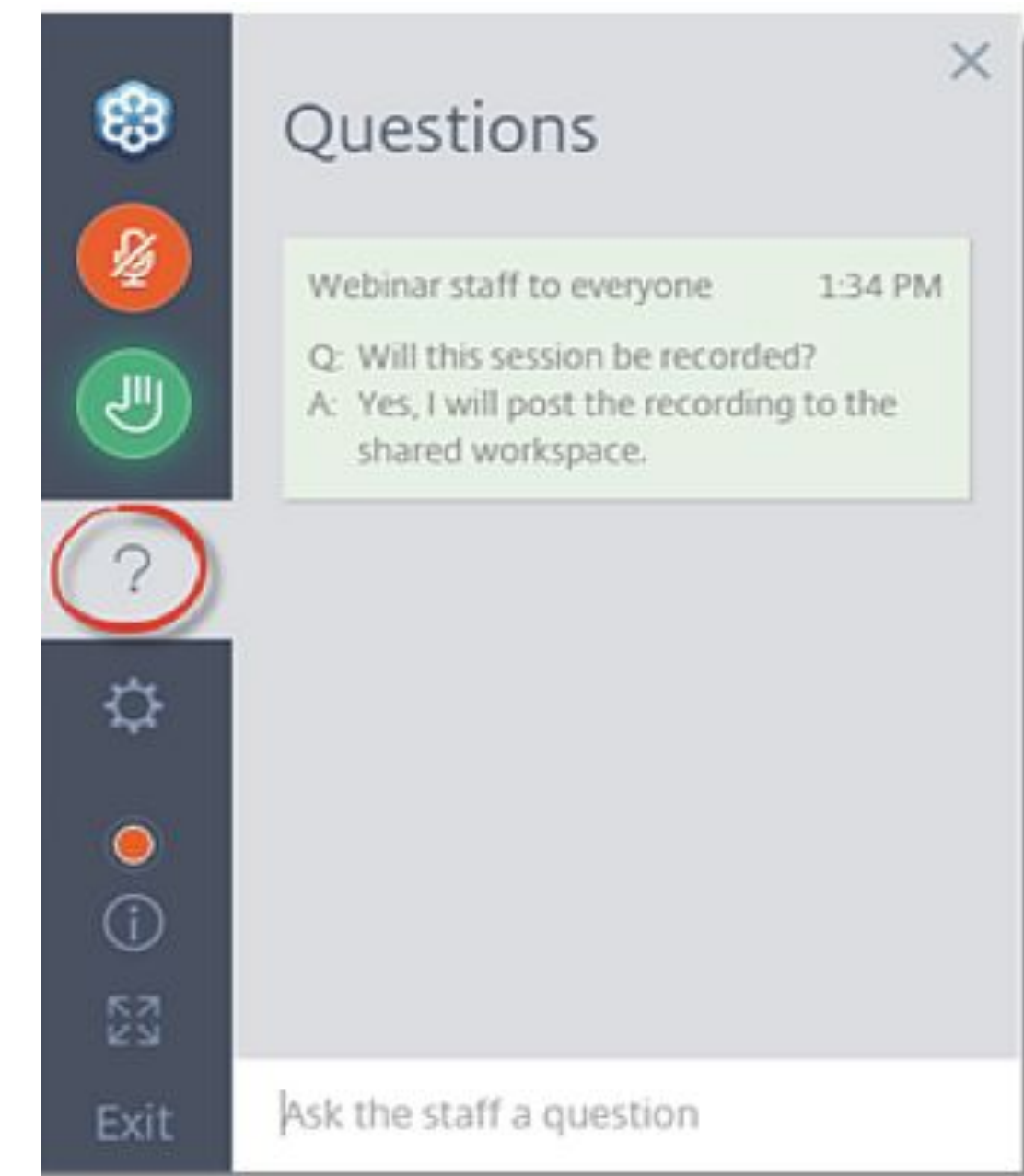
info@cpucsurge.org

Connect with Us on LinkedIn!

www.linkedin.com/in/surgeoutreach

Session 3: AB 2143 and SURGE Q&A

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Looking Ahead & Next Steps



Looking Ahead & Next Steps

Share Your SOMAH Experience

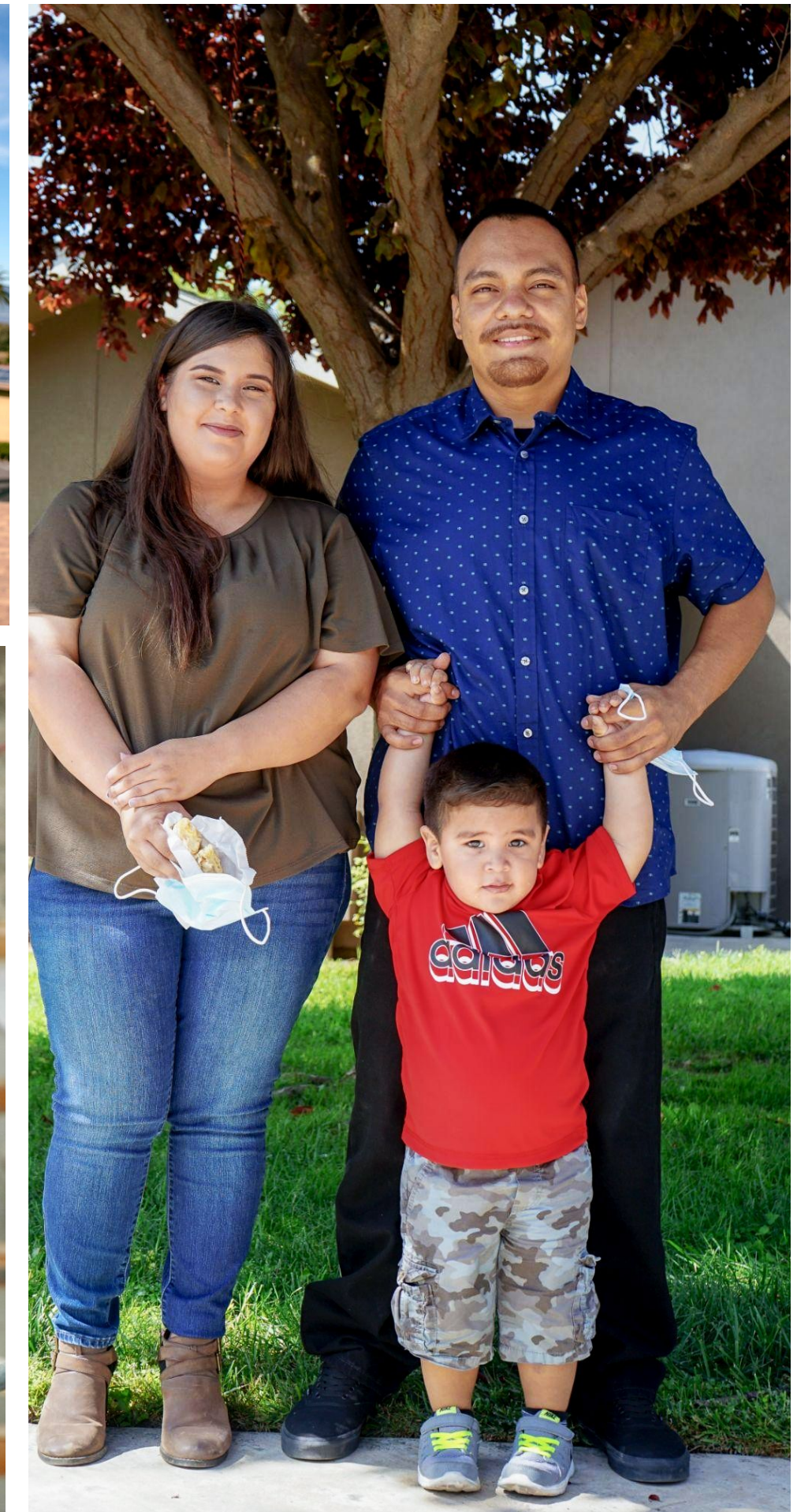
Encourage others to get involved!

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:

- Subscribe to our newsletter: calsomah.org/email-sign
- Follow/like us at @CaISOMAH on
 - [X](#) | @CaISOMAH
 - [Facebook](#) | facebook.com/CaISOMAH
 - [Instagram](#) | @Calsomah
 - [YouTube](#) | SOMAH
 - [LinkedIn](#) | linkedin.com/company/calsomah



Looking Ahead & Next Steps

Upcoming Events

- **March 6:** Applicant & Contractor Office Hours: SOMAH Program Handbook Updates
- **March 21:** Job Training Overview
- **April 10:** Making Solar Easy with SOMAH's Technical Assistance Services
- **April 18:** Applicant & Contractor Eligibility Training
- **May 22:** Tenant Education Training
- **June 5:** Q2 Public Forum



Register at calsomah.org/events

Looking Ahead & Next Steps

What's Next?

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- 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



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!