Q3 Public Forum

August 24, 2022

SOMAH

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 - 1:35 | **Session 1: SOMAH Program Update**
                              Key program stats and
updates

                              Q&A/Discussion
1:35 - 1:40 | **Break**
1:40 - 2:40 | **Session 2: Tenant Education Updates & Future Strategies**
                              Tenant education evaluation
findings & trends

                              Future initiatives
                              Q&A/Discussion

2:40 - 2:45 | **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 Warner | 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

Technical Assistance

Sarah Hill | SOMAH Program Manager

Staci Givens | SOMAH Program Manager

Luis Amar | SOMAH Technical Assistance Specialist

Zara Jamshed | SOMAH Technical Assistance Specialist

Workforce Development

Staci Hoell | SOMAH Workforce Development Sr. Manager

Walther Perez | SOMAH Workforce Development Manager

Minerva Defee| SOMAH Workforce Development Manager

Ingrid Murillo | SOMAH Workforce Development Coordinator

Welcome & Introductions
SOMAH Program Administration Team

Marketing, Education & Outreach

Brittany Chenier | SOMAH ME&O Manager

Vallerie Gonzalez | 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
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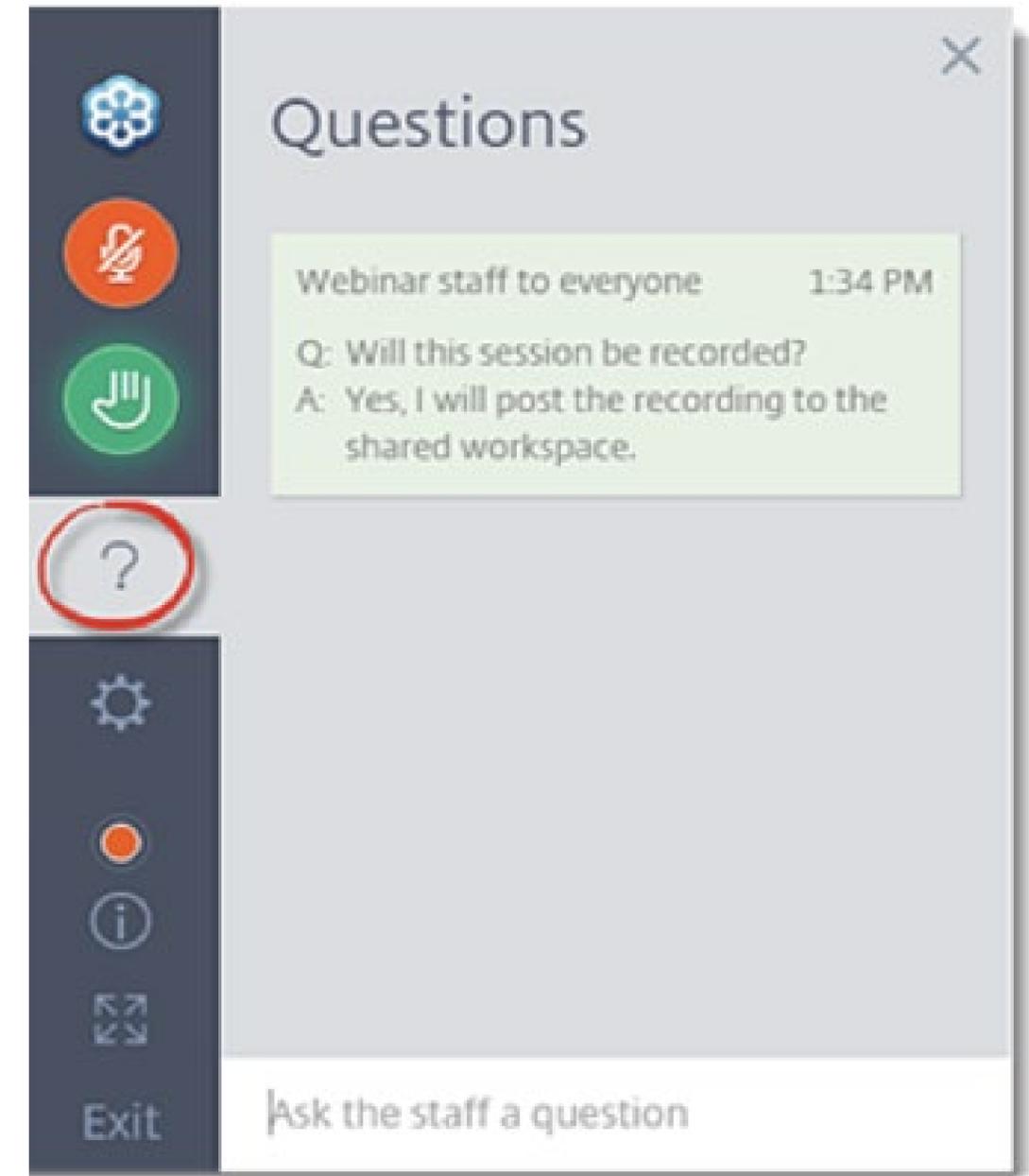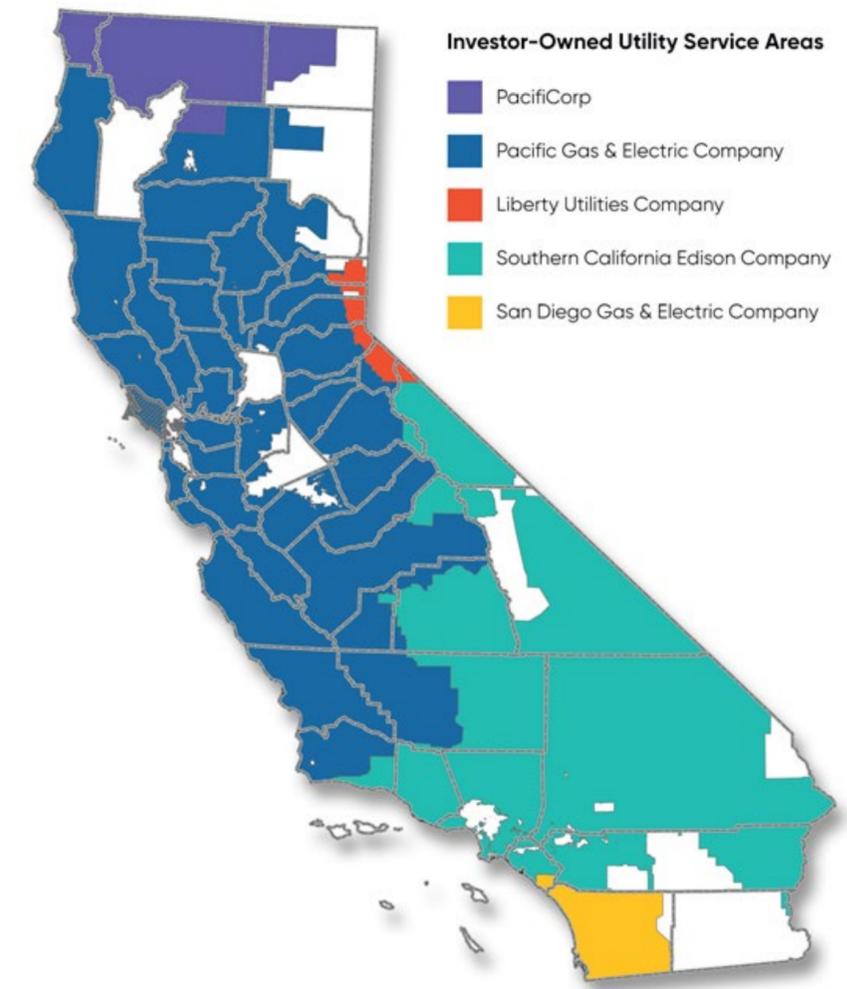
Session 1:
SOMAH Program Update

Walther Perez
Workforce Development Program Manager

Session 1: SOMAH Program Update
Application breakdown

Utility Territory	# of Applications
Pacific Gas & Electric	230
Southern California Edison	144
San Diego Gas & Electric	50
PacifiCorp	1
Liberty Utilities	2
Totals	**427**

Investor-Owned Utility Service Areas
- PacifiCorp
- Pacific Gas & Electric Company
- Liberty Utilities Company
- Southern California Edison Company
- San Diego Gas & Electric Company

Session 1: SOMAH Program Update
Where We Are Today

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

Utility	Available Funding
Liberty Utilities	~$1,470,907
PacifiCorp	~$6,335,208
PG&E	~$135,978,553
SCE	~$212,787,645
SDG&E	~$49,911,256

- **$109.2 million** in funding that's already been reserved
- **$406.5 million** funding remaining

Where We Are Today

- **35%** of SOMAH's active applications are located in Disadvantaged Communities (DACs)*

- Tenants are slated to receive **~86.5%** of the electricity generated from SOMAH installations

Both

CalEnviroScreen Disadvantaged Communities

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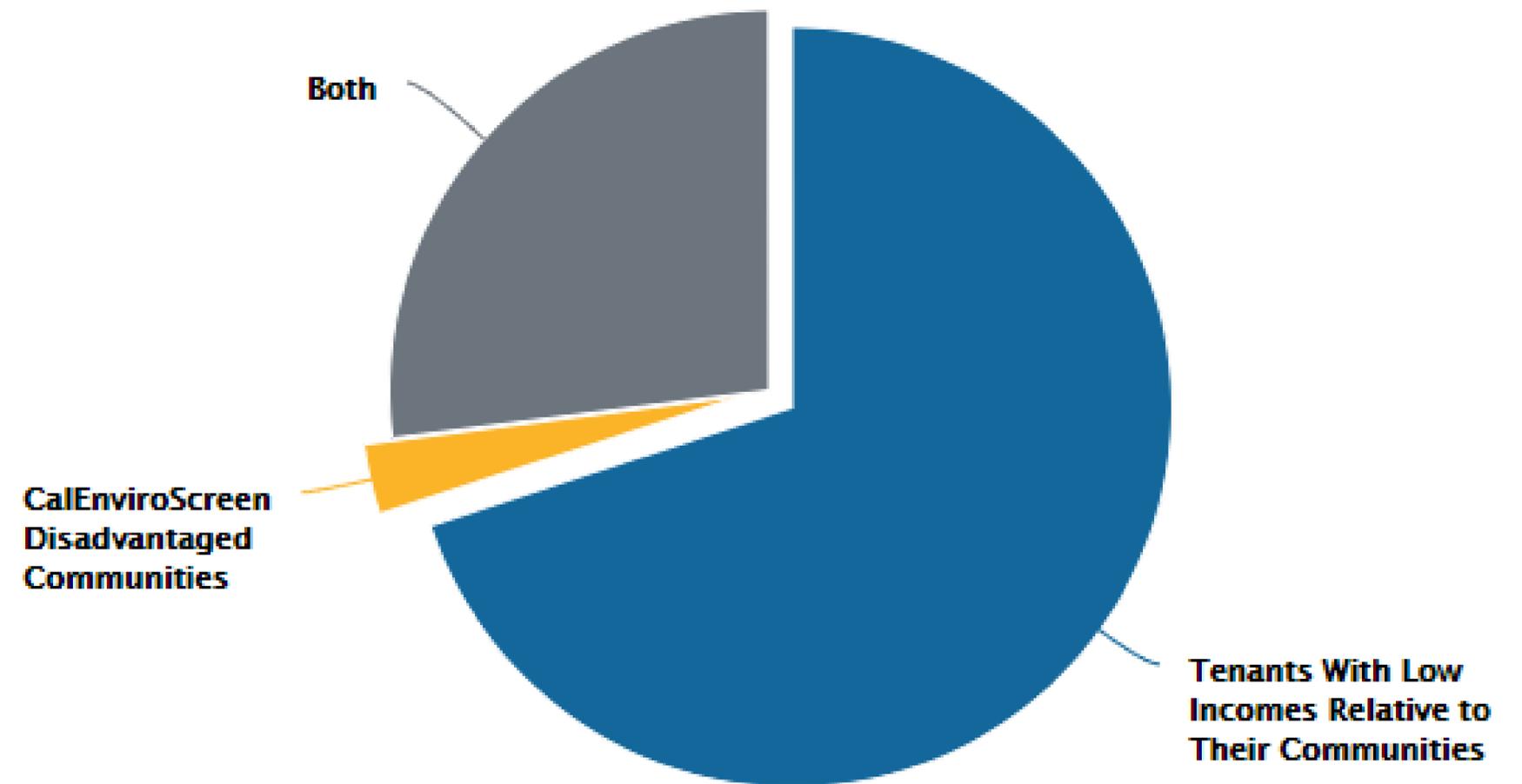
*DACs are defined as "the top 25% scoring areas from CalEnviroScreen along with other areas with high amounts of pollution and low populations" SB 535

Additional Program Statistics

- Serving **53,881** tenant units

- Average system size: **170** kW

- 14 participating contractors
  - **12** subcontractors reported

- Pipeline supports **783** job training opportunities
  - Nearly **51,000** projected training hours
  - Over **$1 million +** in projected wages
  - Leveraging over **65** job training organization relationships
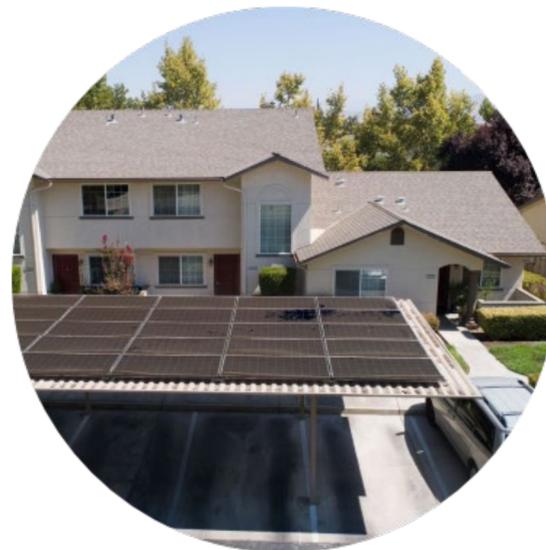
Additional Program Statistics

- ## Progress Payments
  - **41** progress payments approved (**$7.9 M**)
  - **6** under review/pending

- ## Incentive Claims
  - **53** final incentive payments issued (**$16.3 M**)
  - **7** close behind at Incentive Claim Milestone, inspection, and pending payment
  - **9** under review/upcoming

- ## Upcoming activity
  - Q4 ICF due dates: **90 projects**

STEP 1 — Reservation request package

STEP 2 — Energy efficiency compliance milestone

STEP 3 — Proof of project milestone

OPTIONAL — Progress Payment Pathway Request

STEP 4 — Incentive claim package

Completed Projects

51 completed projects, with **9.3** MW of electricity serving over **49,587** tenant units across the state!

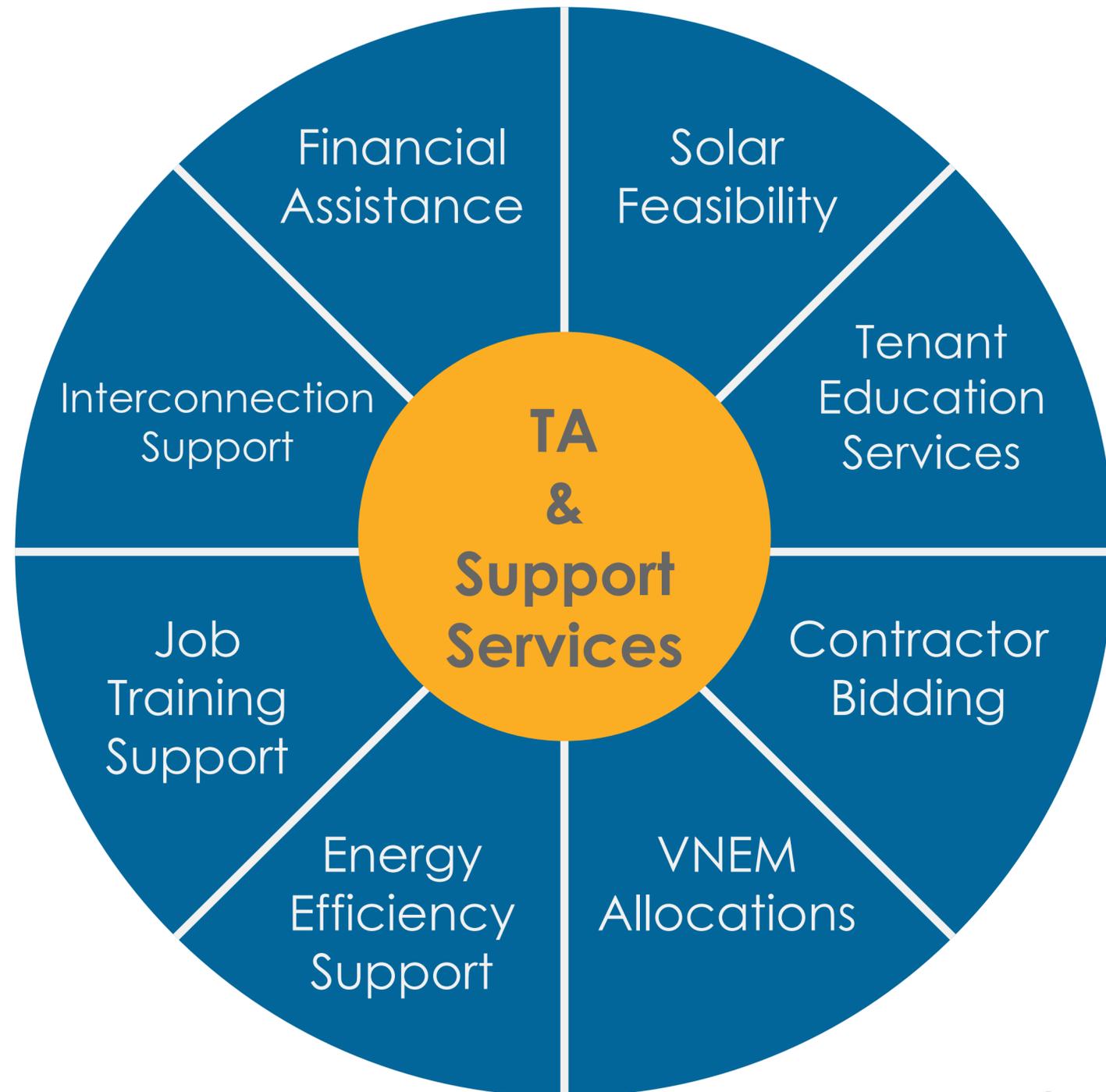# Other Program Updates & Announcements

- **Petition for Modification (PFM) Update**
  - Incentives PFM filed to the California Public Utilities Commission (CPUC) Aug 11, 2022

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

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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

TA & Support Services: Tenant Education

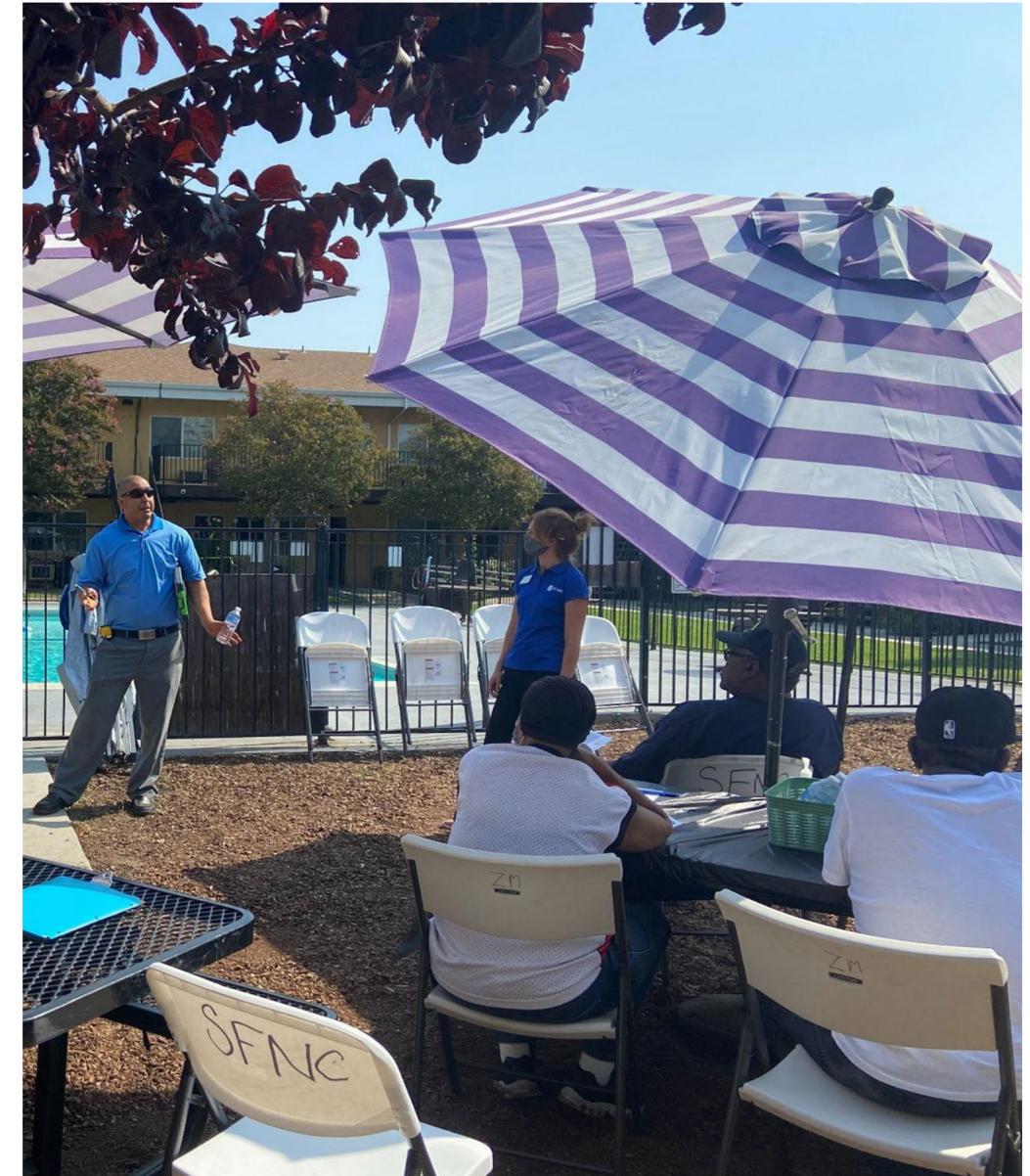Free tenant education support services to help projects reach their tenant education requirements:

- 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

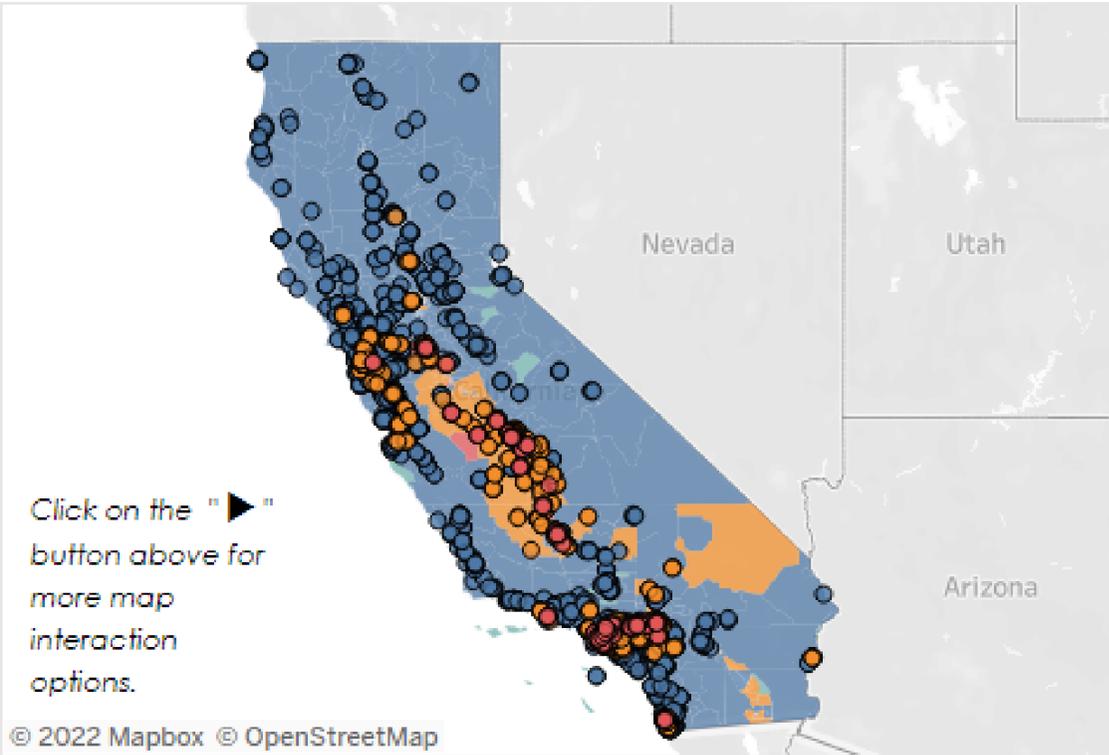# SOMAH Resources - Eligible Properties Map

Property Locations and Disadvantaged Communities

Click on the "▶" button above for more map interaction options.

© 2022 Mapbox © OpenStreetMap

The [5] **Property Locations** by [1] **Disadvantaged Community** 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 3.0 criteria.
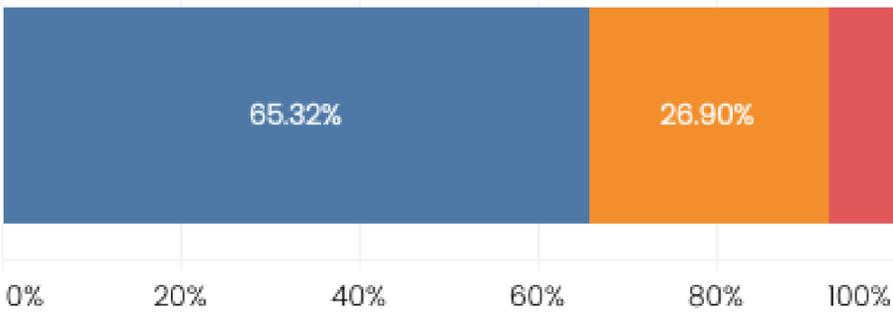
Communities
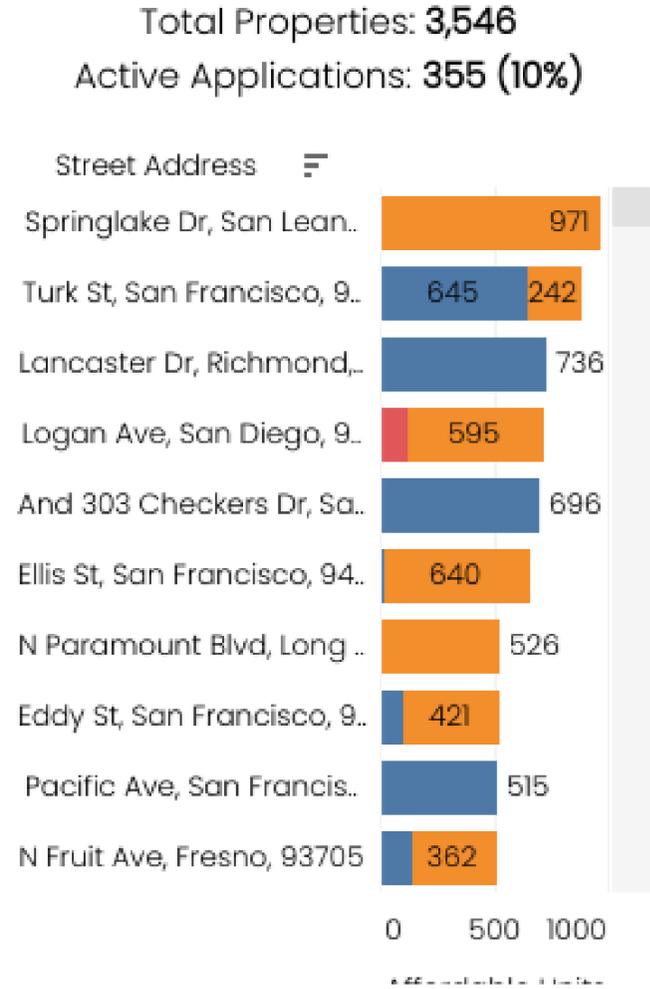
Affordable Housing Units by Disadvantaged Community

Top 5% (Most Disadvantaged)	19,593
75-95% (Disadvantaged)	71,266
Bottom 75% (Least Disadvantaged)	173,042
No percentile available	1,029
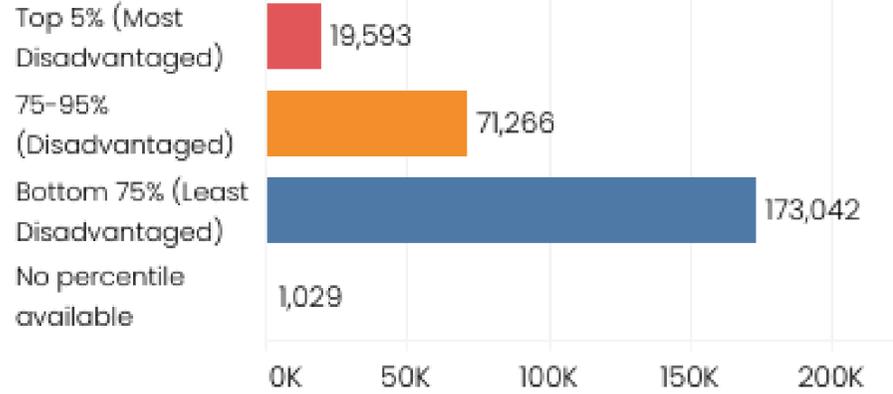
This chart shows the number of affordable housing units by disadvantaged community status.

Percent of Total Based on Filter Criteria

65.32%   26.90%

Affordable Housing Units [7] by Street Address

Total Properties: **3,546**
Active Applications: **355 (10%)**

Street Address	
Springlake Dr, San Lean..	971
Turk St, San Francisco, 9..	645 242
Lancaster Dr, Richmond,..	736
Logan Ave, San Diego, 9..	595
And 303 Checkers Dr, Sa..	696
Ellis St, San Francisco, 94..	640
N Paramount Blvd, Long ..	526
Eddy St, San Francisco, 9..	421
Pacific Ave, San Francis..	515
N Fruit Ave, Fresno, 93705	362

Visit: **Calsomah.org/eligible-somah-properties-map**

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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
Success Stories

Completed Project:

Cottonwood Creek Apartments

- Located in Suisun City, CA

- 94 households

- 228.182 CEC-AC

- Estimated monthly savings $47 per unit

- 100% of bill credits to tenants

- SOMAH job trainee hired by solar contractor

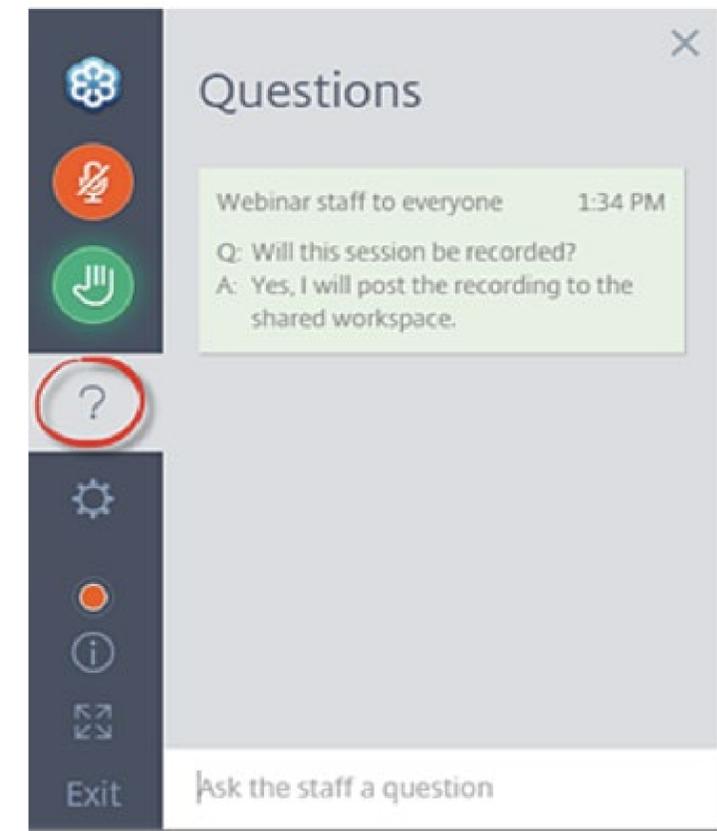# Session 1: SOMAH Program Update
Q&A

- Name and organization
- **Verbal** comments and questions
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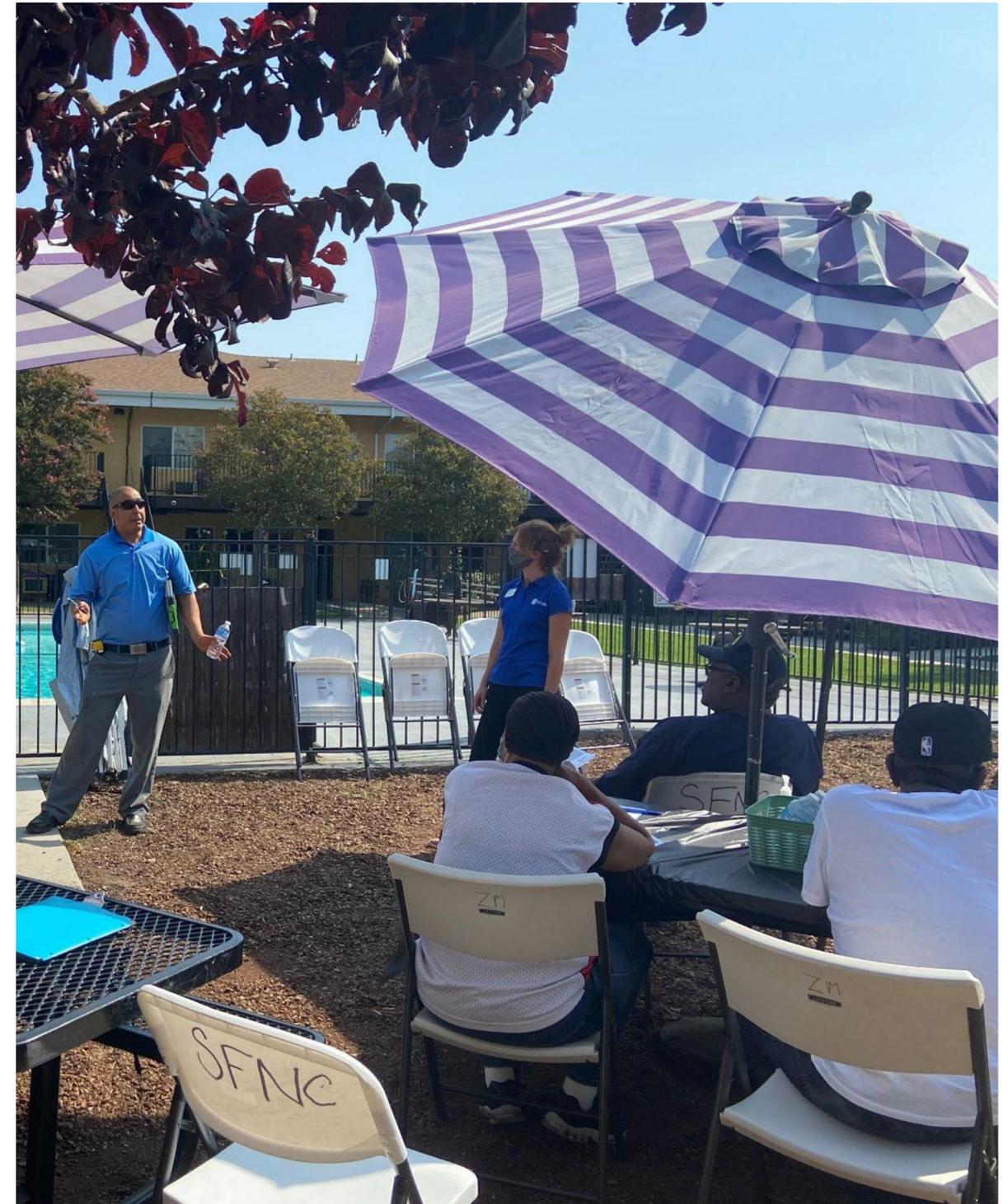 - Use the chat box to write in your comment or question

BREAK (5 min)

Session 2: Tenant Education Updates
Tenant Education Findings

Agenda

- Tenant Education Review

- Pilot Survey Results

- Completed Tenant Education Data

- Tenant Feedback

- Future Initiatives and Strategies

Tenant Education Requirements

AFFIDAVIT ENSURING TENANT EDUCATION:

Start date of construction: _____

1. The **Host Customer** provided SOMAH approved education materials to all tenants **60 days or fewer** prior to the start of construction.

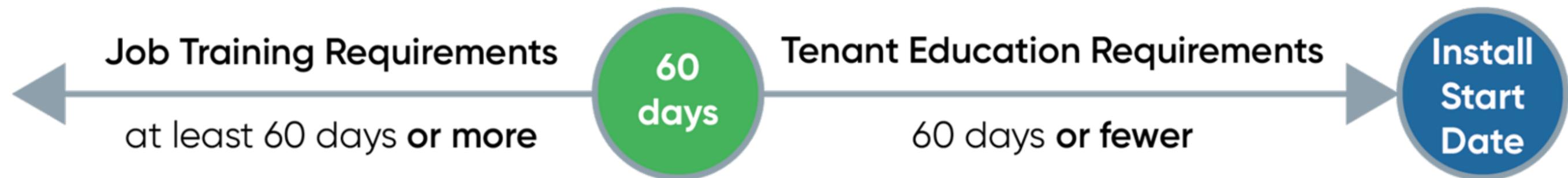# Tenant Education Requirements

Tenant Education Requirements:

Provided SOMAH approved education materials to all tenants **60 days or fewer prior to the start of construction.**

#1

a. Direct delivery to residence OR

b. Mailer sent via U.S. Postal Service

#2: At least one or more of the following

a. Email notification

b. Tenant meeting/workshop

c. Other:

Job Training Requirements — at least 60 days **or more** | 60 days | Tenant Education Requirements — 60 days **or fewer** | Install Start Date

Tenant Education Requirements

Tenant Education Toolkit:

Required materials *(available in seven languages)*

Flyers:
- What to expect with SOMAH
- How will your utility bill change?
- Energy Savings Assistance (ESA) program materials
  - *Languages available based on utility*
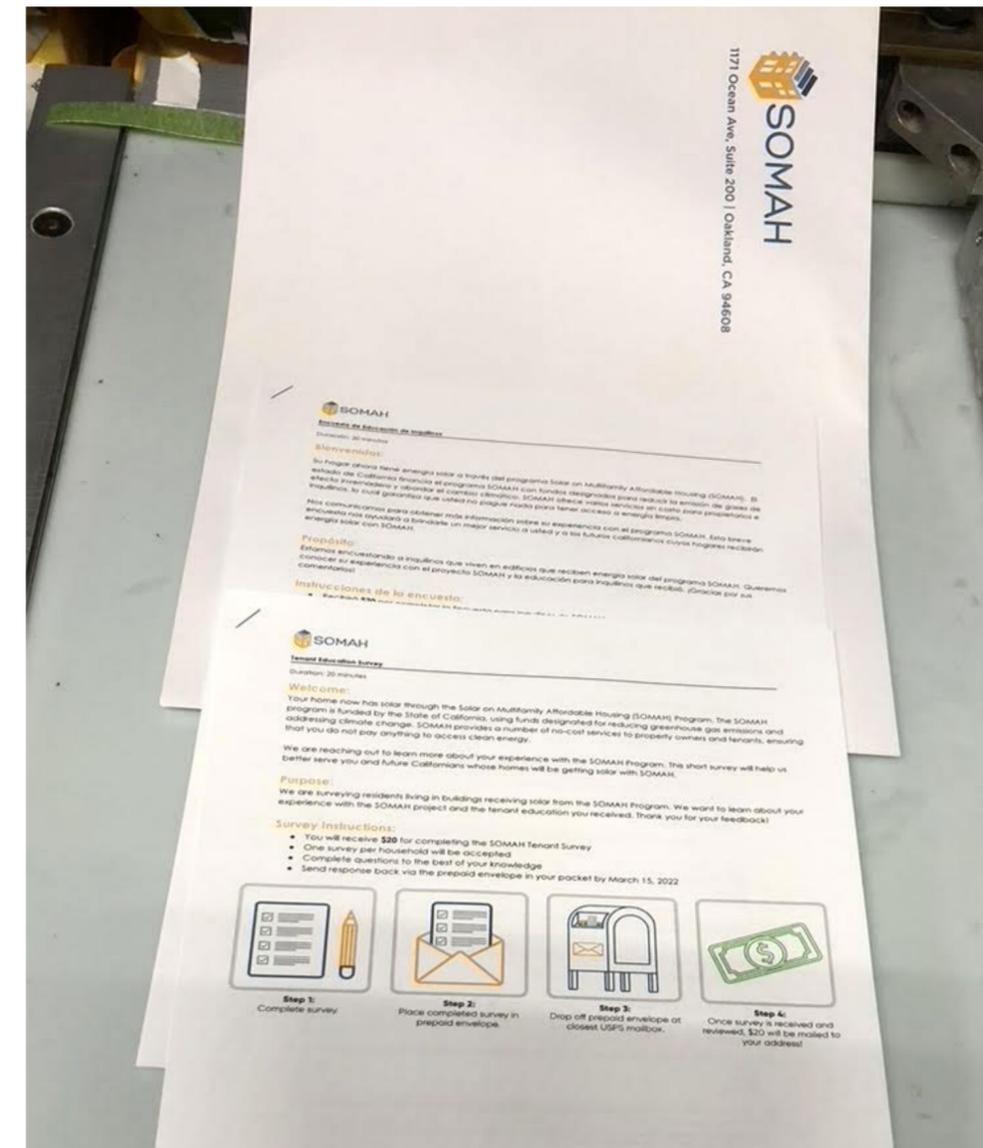
Tenant Education Survey Findings

Pilot Survey Result

Survey Design:

- 20 min paper survey sent via USPS

- 45 days to respond

- Contacted onsite manager

- Incentive based

- Survey Goals:

  - Program assessment

  - Tenant education feedback

  - SOMAH program feedback

  - Tenant needs

  - Energy savings

Pilot Survey Result

- **10/30 surveys** returned
- **7/10 residents** received and reviewed **at least 1** SOMAH Tenant Education material:
  - **(7)** "What to expect with SOMAH"
  - **(5)** "How will your utility bill change?"
  - **(2)** "Energy Savings Assistance (ESA) program"
  - **(4)** "Simple ways to save energy"
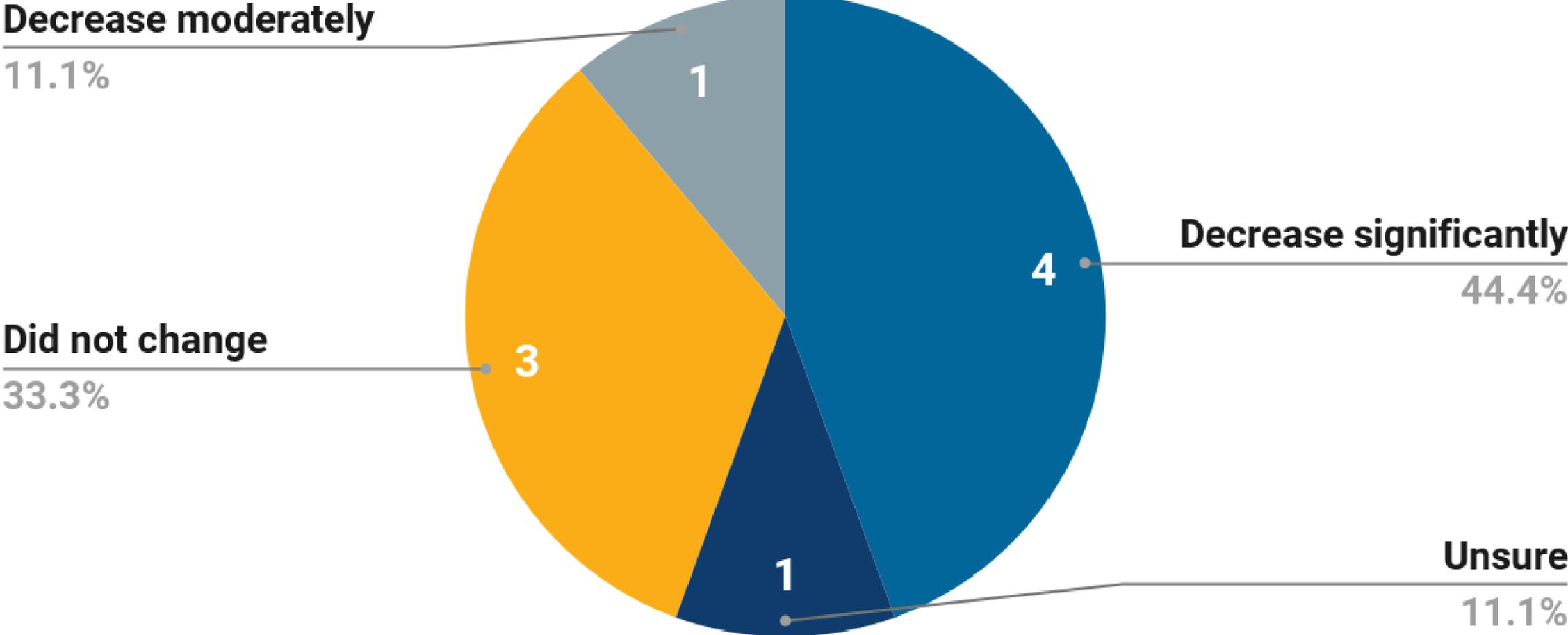 - **(1)** "Get paid to install solar where you live"

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  - **(7)** "What to expect with SOMAH"
  - **(5)** "How will your utility bill change?"
  - **(2)** "Energy Savings Assistance (ESA) program"
  - **(4)** "Simple ways to save energy"
  - **(1)** "Get paid to install solar where you live"

- **9/10 residents** would like to learn more about topics related to solar and SOMAH:
  - **(2)** Job training opportunities
  - **(3)** Learning how solar energy works
  - **(4)** How a solar install will impact your community
  - **(5)** Ways to save energy in your home
  - **(8)** Utility bill savings

Pilot Survey Result

How did your utility bill change with SOMAH bill credits?

Decrease moderately
11.1%

Decrease significantly
44.4%

Did not change
33.3%

Unsure
11.1%

Completed Tenant Education Data

Completed Tenant Education Data

Tenant Education Requirement: Method 1

Mailer via USPS
6.5%

6

87

Direct delivery
93.5%

36

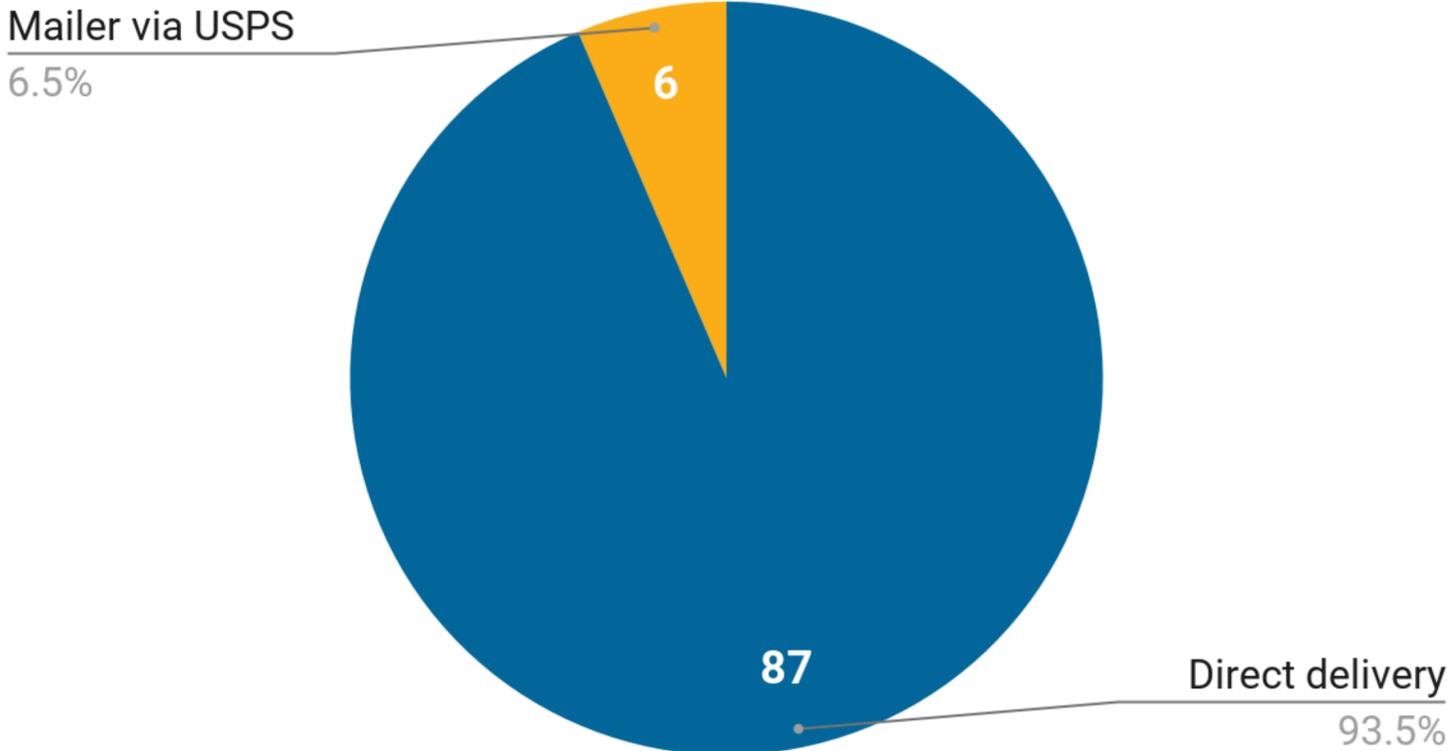*Data from **93 SOMAH Projects** as of 08/22/22. All data from Track B projects and have completed both Tenant Education Requirements.

Completed Tenant Education Data

Tenant Education Requirement: Method 1

Mailer via USPS
6.5%

6

Direct delivery
93.5%

87
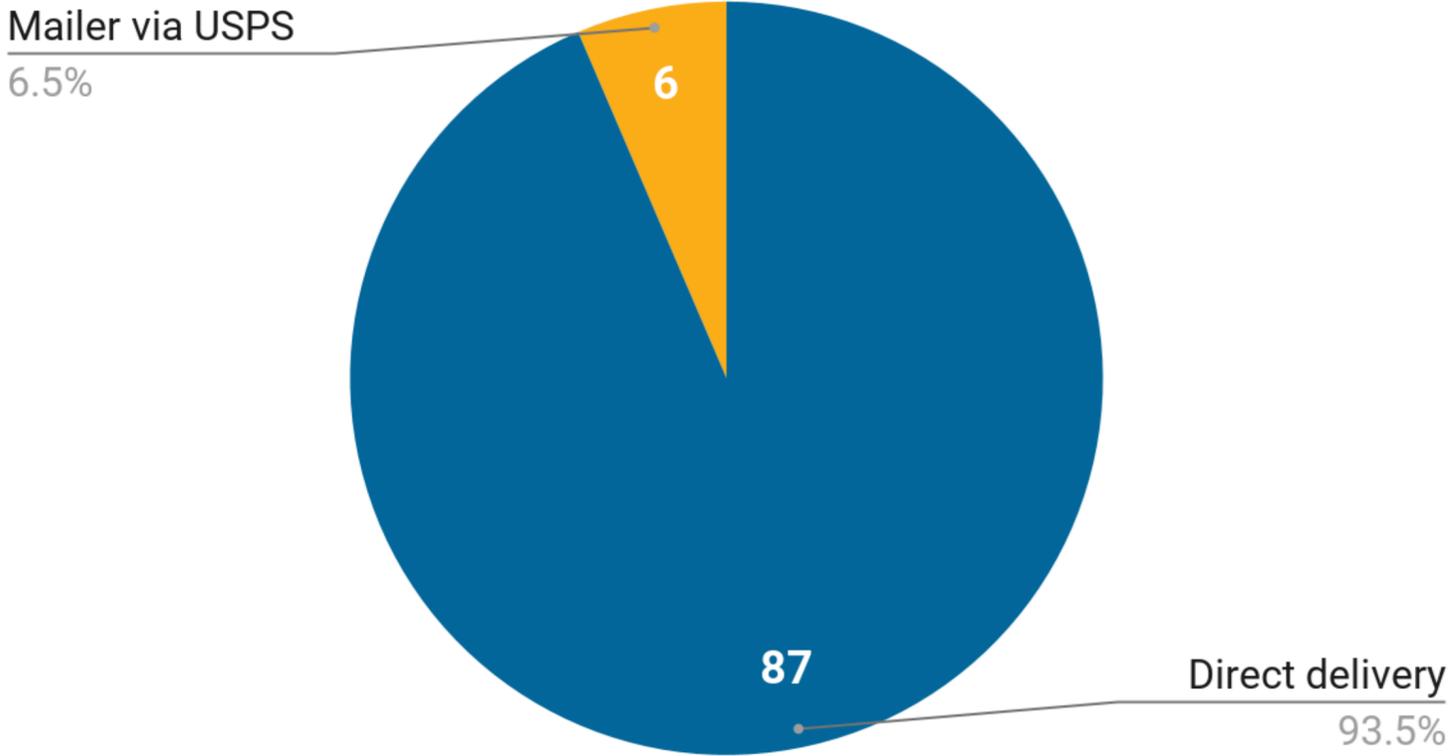
Tenant Education Requirement: Method 2

Category	Number of SOMAH Projects
Hard copies in community area	74
Email	13
One-on-one phone calls & COVID-safe	1
SOMAH Flyer Posting	1
Tenant education meeting/workshop	1
Resident door notices	3

Number of SOMAH Projects

37

*Data from **93 SOMAH Projects** as of 08/22/22. All data from Track B projects and have completed both Tenant Education Requirements.
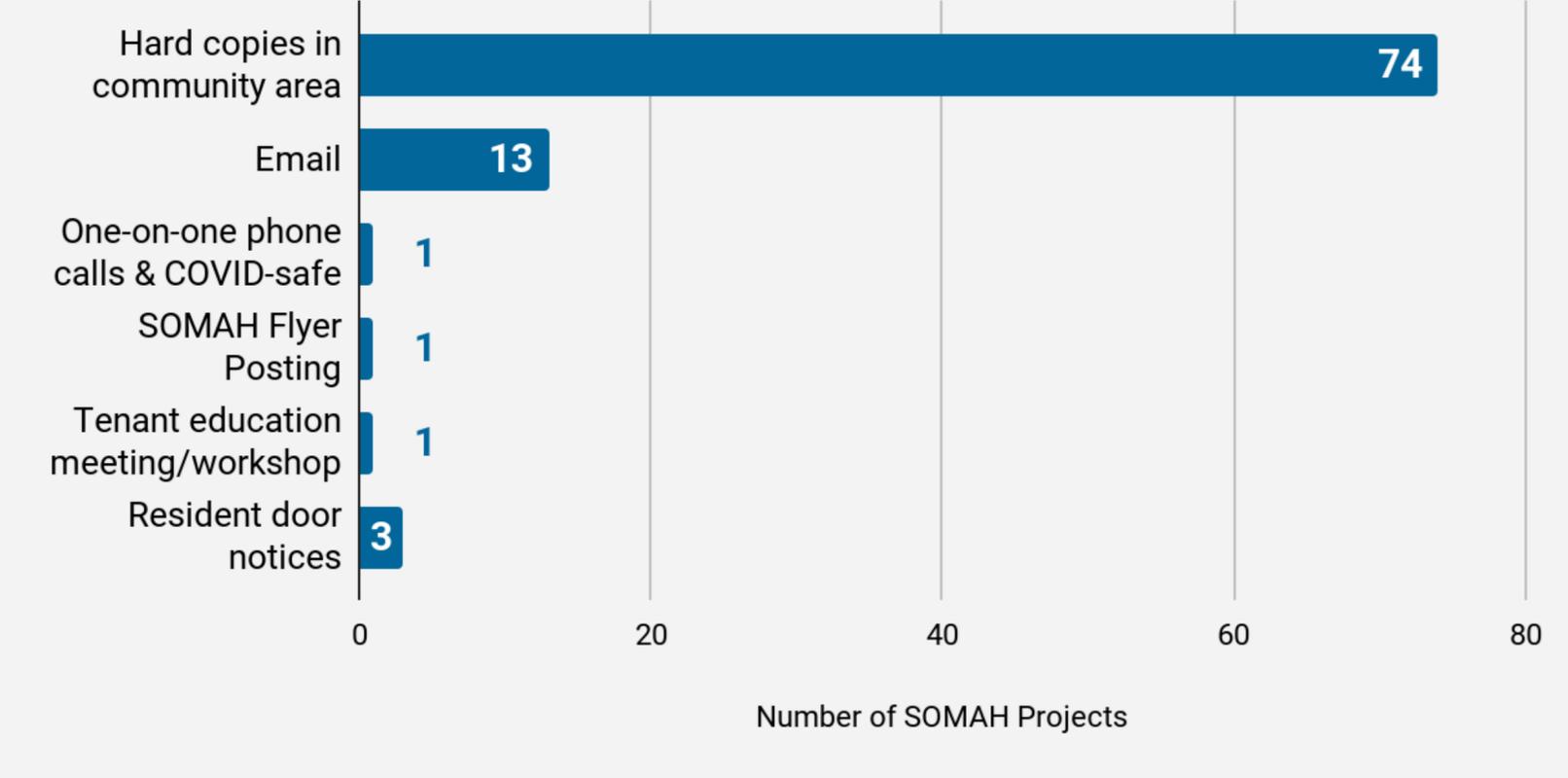
Tenant Education Feedback & Reflections

Tenant Workshop Feedback & Reflection

Pre-workshop: How familiar are you with SOMAH?			Post-workshop: How familiar are you with SOMAH?		
Very	Somewhat	Not at all	Very	Somewhat	Not at all
2	11	25	38	-	-

Comments/Feedback:

- Great presentation
- Liked the 2 session options
- Liked the different presenters - kept it interesting
- Good explanations, clear to understand
- Really appreciated you all being here
- Helpful to have questions answered in-person

Tenant Feedback & Reflections

Resident Questions:

- When did the solar go live?
- Will we have electricity during blackouts?
- Will discount rates, like CARE or FERA, be impacted?
- When are the Time-of-Use peak hours?
- Can you switch back and forth between the different rate structures?
- How are credits distributed?
- Do buildings without panels still get credits?
- What is the electrical grid?
- Is SOMAH the same entity as Southern CA Edison?
- Can solar credits cover my whole bill?
- Can we now use all the energy we want?
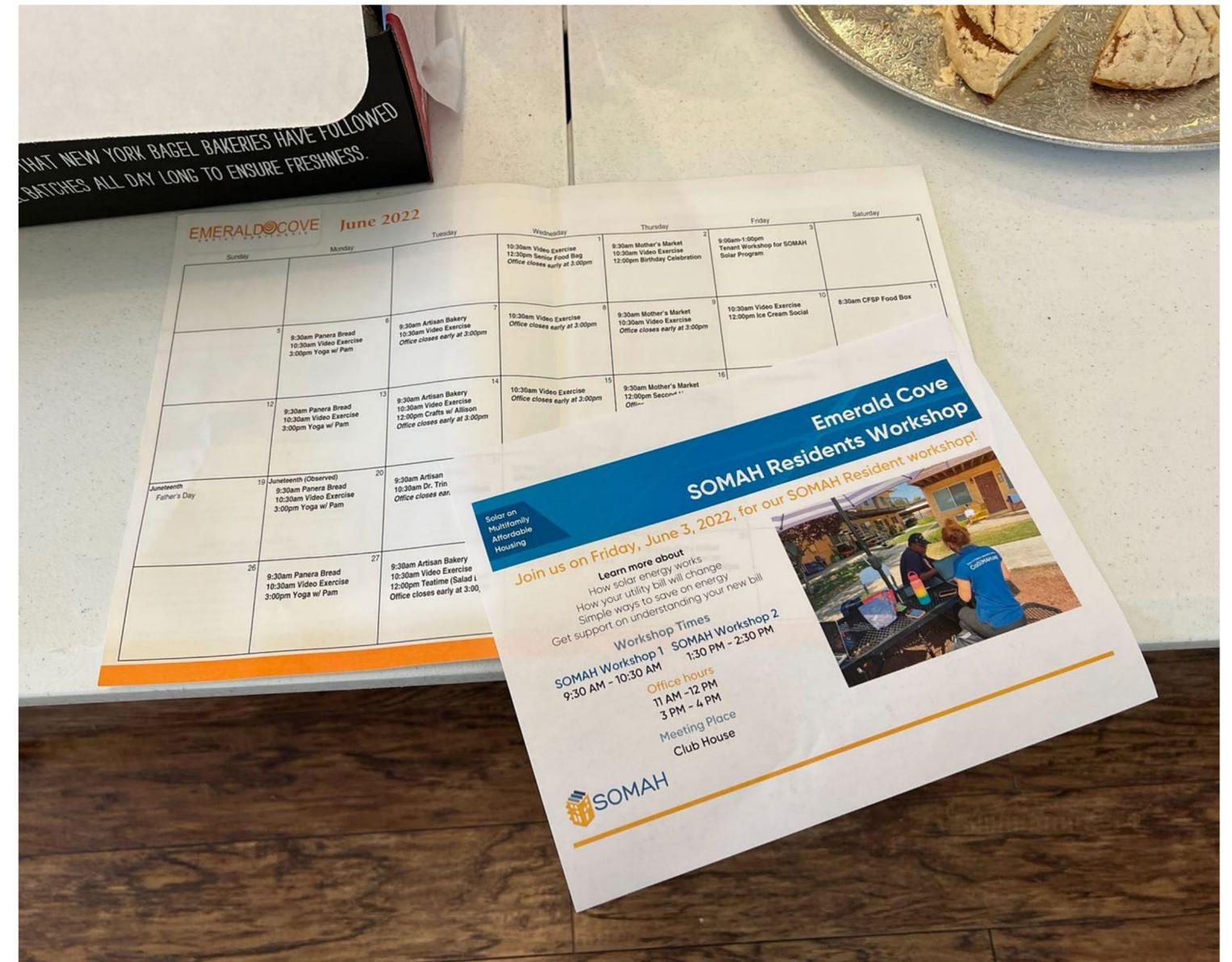
Tenant Feedback & Reflections

Pre-install Workshop Reflections

- What is SOMAH?

- Who is on site?

- What is happening?

- When will this impact me?

- How can I take advantage of the job opportunity?

Post-install Workshop Reflection

- What has changed on my bill?

- How can I get the most savings?

- What is ESA?

- How can I be more energy conscious?

Tenant Education Future Initiatives & Strategies

Tenant Education Future Initiatives

Shifting Tenant Education requirements + timeline:

Current Requirement	Proposed Change

The **Host Customer** provided SOMAH approved education materials to all tenants **60 days or fewer** prior to the start of construction.
1. What to expect with SOMAH
2. How will your utility bill change?
3. Energy Savings Assistance (ESA) program materials

Tenant Education Future Initiatives

Shifting Tenant Education requirements + timeline:

Current Requirement	Proposed Change

*The **Host Customer** provided SOMAH approved education materials to all tenants **60 days or fewer** prior to the start of construction.*
1. *What to expect with SOMAH*
2. *How will your utility bill change?*
3. *Energy Savings Assistance (ESA) program materials*

1. **NEW: Handbook change**
   - Contractor Tenant Education Requirement
     - Share revised: **60 days** or more **before** install
       1. Get paid to install solar
       2. What to expect with SOMAH
       3. Site Safety Map

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Tenant Education Future Initiatives

Shifting Tenant Education requirements + timeline:

Current Requirement	Proposed Change

The **Host Customer** provided SOMAH approved education materials to all tenants **60 days or fewer** prior to the start of construction.
1. What to expect with SOMAH
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	1. NEW: Handbook change
	• Contractor Tenant Education Requirement
	  ○ Share revised: **60 days** or more **before** install
	    1. Get paid to install solar
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	    3. Site Safety Map
	
	2. CHANGE: Handbook change
	• Host Customer/ Property Owner
	  ○ Share: **60 days** or more **after** install
	    1. IOU ESA Materials
	    2. How will your utility bill change?
	    3. Simple ways to save on energy

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Tenant Education Future Initiatives

Shifting Tenant Education requirements + timeline:

Current Requirement	Proposed Change

Becoming an eligible SOMAH contractor or subcontractor is easy. You must:

- ***Complete an online SOMAH contractor eligibility workshop***

Tenant Education Future Initiatives

Shifting Tenant Education requirements + timeline:

Current Requirement	Proposed Change

Becoming an eligible SOMAH contractor or subcontractor is easy. You must:
 	
• ***Complete an online SOMAH contractor eligibility workshop***
	3. NEW: Handbook change
	  ● Required **online Tenant Education Training** in addition to contractor training
	     ○ By project leads
	        ● Track A: Host Customer/ Property Owner
	        ● Track B: Contractors

Tenant Education Future Initiatives

Tenant Initiatives:

Additional Tenant Education support:

1. **SOMAH Welcome Letter**
   - All Tenants
     - PA service

1. **On-site Manager Training**
   - Host Customer/ Property Owner
     - Provide on-site manager information
     - PA hosted training
     - Should it be Required or Optional?

1. **SOMAH Tenant Education Wellness Check**
   - Contractor/ Host Customers/ Property Owners
     - Review Tenant Education Plan
     - Support in achieving TE Requirements

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Poll Question

Open Discussion
+
Questions

Discussion Questions

1. Do you think these changes will help ensure tenants are more centered in the SOMAH program?

1. What challenges do you think you will face with this changes?

1. What support would you need from the SOMAH PA to help your team transition to the new TE requirements?

Tenant Education Future Initiatives

Timeline and Next Steps:

Q3 & Q4 2022:
- Stakeholder Engagement
- Revise Tenant Education materials to align with expected changes
- Share changes and procedures with stakeholders

Q1 2023
- In text change to Handbook
- Submit to CPUC
- Implement changes by March 2023

Sarah Salem

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Sana Sheikholeslami

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sana.sheikholeslami@calsomah.org

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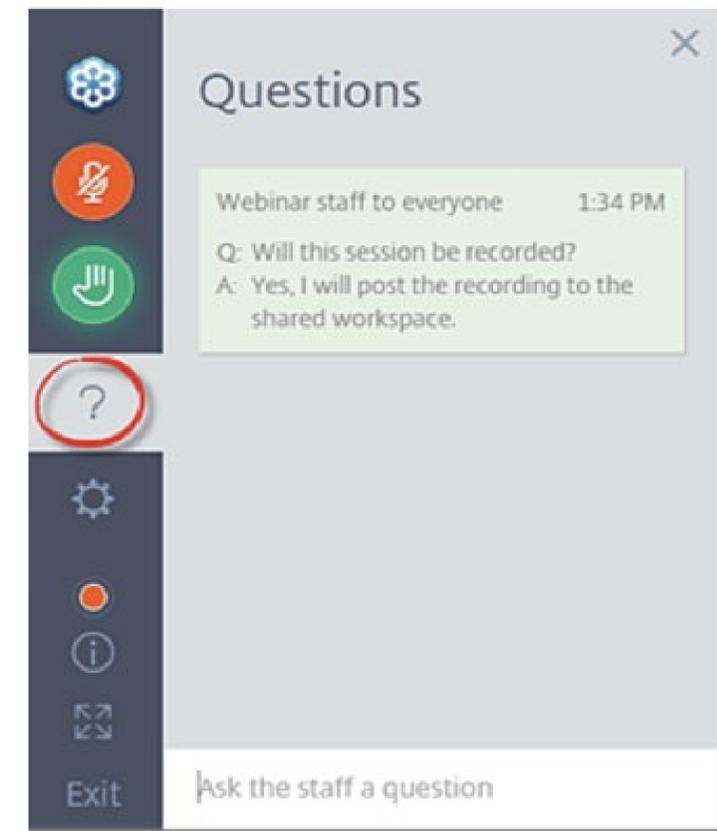
Looking Ahead & Next Steps

Looking Ahead & Next Steps
Upcoming Events

- **Sep 29**: Applicant & Contractor Eligibility Training

- **Oct 13**: Tenant Education Training

- **Nov 2**: Q4 Public Forum *(pending)*

- **Dec 8**: Applicant & Contractor Eligibility Training

Register at <u>calsomah.org/events</u>

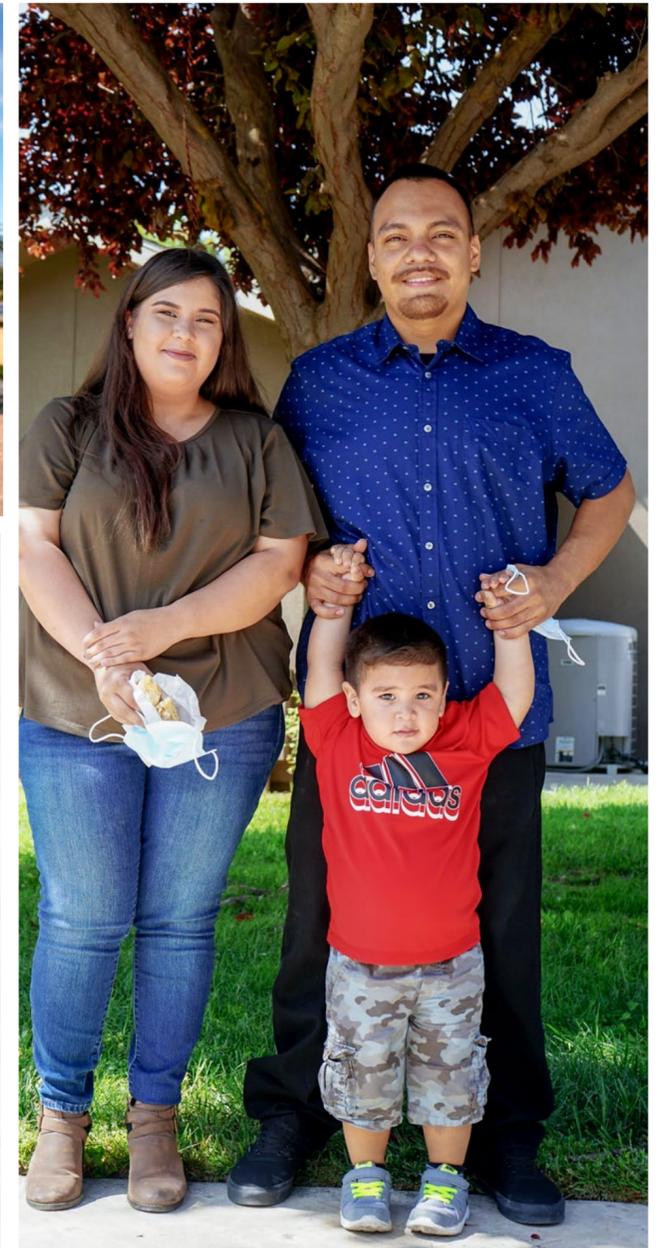# Share Your SOMAH Experience

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 @CalSOMAH on
  - **Twitter** | @CalSOMAH
  - **Facebook** | facebook.com/CalSOMAH
  - **Instagram** | @Calsomah
  - **YouTube** | SOMAH
  - **LinkedIn** | linkedin.com/company/calsomah

Looking Ahead & Next Steps
What's Next?

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Web form: **CalSOMAH.org/contact-us**

General hotline: **858-244-1177 ext. 5**

Tenant hotline: **800-843-9728**