

Meeting Notes

Solar on Multifamily Affordable Housing (SOMAH) Advisory Council Meeting Q3 2023

September 8, 2023

LA River Center & Gardens, Upper Sierra Madre Conference Room
Los Angeles, CA

Attendees

SOMAH Program Administrators

Marisa Villarreal | SOMAH Program Manager
Hannah Keenan | SOMAH Program Manager
Vallerie Gonzalez-Byrum | SOMAH Program Manager
Walther Perez | SOMAH Program Manager
Minerva Defee | SOMAH Program Manager
Sarah Salem | SOMAH Program Manager
Stacey Lee | SOMAH Program Coordinator
Alessandra Gonzales | SOMAH Program Coordinator
Nicole Munoz-Proulx | SOMAH Program Coordinator
Terez Songco | Communities for a Better Environment (SOMAH PA Partner)

SOMAH Advisory Council Members

Agustin Cabrera | RePower LA
Alma Marquez | Independent Consultant
Andrea Barnier | Self-Help Enterprises
Carlos Aguilar | Coalition for Economic Survival
Elizabeth C Elliot | Northern Circle Indian Housing Authority
Jakobi Ewart | The Niles Foundation - virtual
Kenneth Wells | O&M Solar Services
Nicole Lim | California Indian Museum & Cultural Center

Meeting Agenda

1. Welcome & Introductions
2. Session 1: SOMAH Program Update
3. Session 2: How AC Members Can Support Program Outreach & Promotion
4. Session 3: Group Activity
5. Session 4: Tenant Education & Engagement Updates
6. Session 5: Workforce Development Updates
7. Wrap-up & Next Steps

Meeting Notes

Welcome & Introductions

Marisa Villarreal, SOMAH Program Manager

Marisa Villarreal welcomed Advisory Council (AC) members to the cohort's first in-person meeting. Marisa led a round of introductions, reviewed the meeting agenda and shared the meeting goals.

Session 1: SOMAH Program Update

Stacey Lee, SOMAH Program Coordinator
Marisa Villarreal, SOMAH Program Manager

Members of the Program Administrator (PA) team shared the latest program updates, including key program stats, tribal updates and the proposed future structure of SOMAH's advisory bodies.

Notes

Stacey Lee recapped the topics from the AC's Q2 meeting and presented the latest application, funding and project stats. Stacey and Marisa Villarreal then provided other program updates:

Ribbon-Cutting Ceremony at Coyote Mountain Apartments in Bishop, CA

- In partnership with the Bishop Paiute Tribe and GRID Inland Empire, the SOMAH PA held a ribbon-cutting ceremony on August 8 to celebrate California's first tribal SOMAH-funded solar installation.
- 49.29 kW DC system serving 24 tenant units.
 - Credit allocation split: 82% to tenants and 18% to common areas.
- One job trainee from a local job training organization (JTO) participated in the installation.
- Project costs were \$114,457 incentive via SOMAH, funding from GRID's Tribal Solar Accelerator Fund (TSAF) Program and in-kind donations from the Bishop Paiute Tribe.

Third-Party Evaluation Updates

- The final report of SOMAH's third-party evaluation was released in July 2023.
- The SOMAH PA is formally responding to the report's recommendations September 5 through December 1.
- Highlights from the report include:
 - More marketing of progress payment pathway.
 - Work with IOUs to address interconnection delays: document their interconnection process, have a designated SOMAH liaison to track projects through interconnection.
 - Have IOUs track and report SOMAH bill credits.
 - Update data collection to track: 1) projects switching from Track A to B, 2) construction completion date and 3) located on tribal lands.
 - Updating tenant surveys to collect more in-depth information about tenant experience and education awareness.
 - More outreach to contractors about SOMAH job training resources.
 - Update job trainee surveys to include questions on trainee motivations for participating, how their experience has impacted their career path.
 - Remove EPBB calculator methodology for more equitable incentives across projects.

Marisa shared the SOMAH PA's initial thoughts on the future of SOMAH's two advisory bodies – the SOMAH AC and Job Training Organization Task Force (JTO TF).

- 2024 marks the SOMAH Program's halfway point to 2030.
- Need to maintain program areas with a decreasing budget.
- Proposal
 - 2024 - 2025: New and final cohorts for both the AC and JTO TF.
 - Combined meetings twice a year rather than once.
 - Last term cycle with the AC and JTO TF as separate bodies.
 - 2026 - 2028: Single Advisory Body (13-15 members total – adding 2-4 JTO seats)
 - 2028: Sunset the advisory bodies as the SOMAH Program nears its close.

AC members agreed with the PA's proposed plan.

Discussion

- **AC Member:** Are there any publicly available reports that discuss where SOMAH is now in relation to when the program first started? SOMAH is seen as a model program for equity, DACs, etc.

- **SOMAH PA:** The PA releases a Semiannual Progress Report (SAPR) every January and July that is made publicly available on the CPUC (California Public Utilities Commission) website. SOMAH also has a third-party evaluation every three years. Both reports cover program goals, metrics and progress over time.
- **AC Member:** Could academic institutions help play the role of telling the story of SOMAH's impact and success?
- **SOMAH PA:** Individuals from policy programs have reached out to the PA in the past asking about us. Would love to explore that.
- **AC Member:** SOMAH still has a lot of funding available. Especially in regard to contractors, is there a disconnect between eligible program participants and how much funds there are?
- **SOMAH PA:** SOMAH's third-party evaluation has addressed contractor diversity and participation. There are not a lot of contractors that are set up to meet administrative demands of the program. There are also few contractors that work in the multifamily space.
- **SOMAH PA:** It would be great to have small contractor ambassadors who could share what they did and what worked with them while participating in SOMAH. The PA has documented similar testimonies from property owners (POs) in the past.
- **AC Member:** Are there any policy updates at this time?
- **SOMAH PA:** There is no update on the CPUC ruling. The PA is still waiting on a response from the Commission.
- **SOMAH PA:** In regard to SB 355 from Senator Eggman's office, there is still an opportunity to make final tweaks to the legislation. The overarching impression is that the updates have been very well received and there is generally good support for making additions to the program. There have been some changes to the legislation in the process, including how upfront payments will work. This legislative change will eventually domino into other programmatic changes (e.g., modifying the Program Handbook). It will help define and remove barriers the PA has encountered, such as inclusivity and eligibility). The PA should have more updates to share on this in Q4.
- **AC Member:** Looking at the program timeline and the amount of money left to spend, is there an opportunity to extend the program?
- **SOMAH PA:** The original bill that created SOMAH states the program is to end by 2030, but there has been interest in extending the program for at most two years. The bill did not say more funding could be provided, so we would need to stretch out our existing funds. SOMAH's funding comes from the GHG (greenhouse gas) auction fund collection, which ends in 2026, so less money will be added to the pot as the end date gets closer.
- **AC Member:** What happens to program funds not used up by 2030?

- **SOMAH PA:** Ideally the program would end with most of the funds being used, but any remaining money would have to be managed a certain way. The PA will double check to see how it is written in the original bill.
- **AC Member:** I agree with the proposal of sunseting SOMAH's advisory bodies in the future and encourage the PA to think about what the goals and objectives for these cohorts will be in the coming years. What exactly does the AC want to get done and focus on? What does sunseting and closing the advisory body look like?
- **AC Member:** Is the PA suggesting merging the two bodies because they serve similar goals?
- **SOMAH PA:** Yes, both groups typically receive the same information. If there is interest in focusing on workforce development (WFD) or other topics in the joint body, we could host a working group and ad-hoc meetings to focus on that outside of regular meetings.
- **SOMAH PA:** The PA also wants to be mindful of staff capacity and efficiency in planning and coordinating meetings. We can be creative in how we implement the program, but also need to consider our decreasing budget. The PA intends to have a more focused rather than growth mindset.

Session 2: How AC Members Can Support Program Outreach & Promotion

Vallerie Gonzalez-Byrum, SOMAH Program Manager

Vallerie Gonzalez-Byrum led a presentation on SOMAH's key stakeholders and how AC members could support with outreach and promotion.

- SOMAH stakeholders
 - Investor-owned utilities (IOUs)
 - Community choice aggregators (CCAs)
 - Regional energy networks (RENs)
 - Energy efficiency (EE) programs
 - Government and legislation officials
 - Regional government associations
- Outreach priorities
 - Seek out opportunities to reach a large number of stakeholders.
 - Provide stakeholders with support for potential action items when conducting research.

- Leverage the success of completed SOMAH projects.
- Highlights from 2023
 - Outreach to several CCAs.
 - Co-presented on a panel at the California Climate and Energy Conference.
 - Ribbon-cutting ceremonies with government officials in Carlsbad and Bishop.
 - SOMAH's CBO (community-based organization) partners conducted outreach to various CCAs and legislative bodies, including city council members and mayors.
- On the horizon
 - Outreach to tribal offices to promote the program and fill where there are housing authority gaps.
 - Webinars and presentations: San Diego Green Building Council, Sierra Club Chapter Meeting, Climate Action Campaign.
- Challenge areas where the PA could use AC support
 - Inland Empire, Los Angeles (LA) County, Central Valley.
 - Engaging elected officials – difficult to cold contact without leads.
 - Commitment issues – connections do not always lead to outreach or co-marketing.

Discussion:

- **AC Member:** Does the SOMAH PA take the lead on setting up meetings with elected officials?
- **SOMAH PA:** The PA has in the past, but all our presentations and meetings have been virtual.
- **SOMAH PA Partner:** Our organization has promoted SOMAH's job training opportunities in the City of Los Angeles, even if they are outside of an eligible IOU territory. There is potential for them to be involved in a project, even if they do not live in the territory.

PA and AC members broke out into groups to discuss the following questions:

1. How can the AC support stakeholder outreach and promote SOMAH?
2. What else can SOMAH be doing to increase program awareness?

Group Report-outs:

Group 1

- Think of materials, content or public-facing information the PA could share with the AC and package in a way that's easy to pass along.

- The AC might not want to do cold calls, but can blast information to their connections (e.g., county or elected official groups).
- AC and JTO TF members could serve as ambassadors of SOMAH, using their membership to provide connections.
 - One member, for example, could provide their network with the latest information on SOMAH and incentives.
 - Create a media package members could use to spread the word.

Group 2

- Engage the AC more with specific asks (i.e., “Can you identify 2-3 contacts in these specific areas?”) and focus on strategies that have already been successful.
- Tribal outreach must be very specific – tribal AC members could brainstorm a list of CBOs that could help with outreach.
- Specific networking opportunities with regional bodies such as South Coast Air Quality Management District (EJ Forum) and SoCal Association of Governments (SCAG).
- LA County’s Sustainability Office is interested in decarbonization – could find a way to connect SOMAH with their goals.
- Affordable housing associations – what have been the most successful strategies already?
- Ensure the PA has a strategic communications plan – how do we build that awareness through our social media?
- Utilize the AC more with our social media and other promotions (e.g., reposting ads).

Group 3

- Recommendation:
 - Have a Partners Page on the CalSOMAH website listing all co-marketing partners, past and present advisory body members and government personnel who have supported SOMAH.
- How to utilize the AC’s help to connect to stakeholders:
 - Give the AC a list of stakeholders the PA would like to connect with.
 - Give the AC marketing toolkits – AC members can decide from there if they would like to distribute information.
- Challenges:
 - Not all AC members work in eligible IOU territories, like the City of LA.
 - There may be more important information the AC member organizations may need to distribute.

Session 3: Group Activity

Stacey Lee, SOMAH Program Coordinator

Stacey Lee led a short activity for AC and PA members to get to learn more about each other.

Session 4: Tenant Education & Engagement Updates

Sarah Salem, SOMAH Program Manager

Nicole Munoz-Proulx, SOMAH Program Coordinator

Sarah Salem introduced new members of the SOMAH PA – Nicole Munoz-Proulx, Tenant Engagement Senior Specialist, and Alessandra Gonzales, CBO Partnership Senior Specialist. Sarah presented on SOMAH's updated Tenant Education (TE) Services. Nicole Munoz-Proulx then presented updates to SOMAH's TE requirements.

Notes

TE Services

- Tenant Education is a program requirement as listed in SOMAH's Program Implementation Plan (PIP) and Handbook
 - Ensures benefits to tenants are delivered.
 - Reduces tenant confusion and discomfort.
 - Creates awareness of SOMAH's benefits and changes associated with SOMAH.
 - Centers voices of the tenant community.
 - Introduces SOMAH's job training opportunities.
- Tenant Education Services
 - 1) Tenant Education Services (ex. "Train the trainer" meetings, TE workshops).
 - 2) Continued Tenant Education (ex. Tenant hotline, continued TE workshops, on-site staff training).
 - TE workshops are a free opportunity for pre- and post-install engagement and education.
 - TE service requests for SOMAH projects in Q3 2023.
 - 6 TE 101 meetings with property management and contractors.
 - 9 TE workshops for tenants across 3 properties.
 - 3 Continued TE workshops for tenants across 2 properties.

- Bishop Paiute Tribe – SOMAH’s first completed tribal project
 - 2 adult and 2 youth TE sessions at Coyote Mountain Apartments.
 - 1 adult, 1 youth and 3 Tenant 101 sessions at Arrowhead Apartments.
 - Conducted door knocking in the community prior to workshops to encourage folks to attend.
 - Left materials behind if folks were unable to attend.
 - Highlighted the importance of meeting tenants where they are at, creating an inclusive space for children and being available in person to have important conversations.
 - Tenant discussions spurred a conversation about remote/non-project site opportunities for job trainees.

Tenant Education Future Initiatives

- Current requirement: TE materials provided 60 days or fewer prior to the start of construction
 - What to expect with SOMAH.
 - How your bill will change.
 - Energy Assistance Savings (ESA) program materials.
- Proposed changes:
 - 1) Contractors required to share TE materials 60 days or more *before* install.
 - What to expect with SOMAH.
 - Get paid to install solar.
 - Site safety map.
 - 2) Host customer/property owner required to share 60 days or more *after* install.
 - IOU ESA program materials.
 - How your bill will change.
 - Simple ways to save on energy.
- Current requirement: Contractor or subcontractor must complete an online SOMAH contractor eligibility workshop.
- Proposed change: Required online TE training in addition to contractor eligibility workshop.

Revised Timeline & Next Steps

- Q3 2023 – Reengage and share changes/procedures with stakeholders.
- Q4 2023 – Revise TE materials to align with expected changes, in-text Handbook changes (if necessary), submit changes to the CPUC and implement changes by Q2 2024.

Discussion

- **AC Member:** What is the intent of the new required TE training?
- **SOMAH PA:** Required trainings would equip contractors to offer better support to tenants and POs on the ground. Ideally, contractors would be doing more than just TE, which is often seen as a box to check rather than an effective requirement. Through trainings, the PA hopes to communicate the requirements with contractors and POs more effectively to ensure full understanding and proper responsibility.
- **AC Member:** Are contractors trained on how to be sensitive to and engagement with the demographics of the tenant community being served?
- **SOMAH PA:** This is already included in quarterly TE webinars the PA hosts that are not required for contractors. This change would now make these webinars mandatory for contractors as well.
- **AC Member:** It would be great to hear the stories of tenants who have gone through SOMAH – how has the program transformed their lives?
- **SOMAH PA:** The PA has plans to highlight more of these stories. A tenant recently reached out to our TE hotline to share their positive experience with the program. The PA has followed up with the tenant and is planning to further coordinate to capture the success story.
- **AC Member:** What has been the general response from tenants at sites with completed SOMAH projects? What kind of contact do we have?
- **SOMAH PA:** Tenants have been open to share their experiences and feedback, and the general response has been good. We do not have a lot of capacity due to our team's small size, but the PA would like to be present with the tenants and capture more photos and testimonies, while also ensuring we are there to support them first and foremost.

Session 5: Workforce Development Updates

Walther Perez, Workforce Development Program Manager

Walther Perez provided an overview of SOMAH's goals for each of its WFD audiences – contractors, trainees, job training organizations and the SOMAH JTO TF. Walther presented various WFD updates, including program stats from 2022 and new resources.

Notes

Trainee Stats & Learnings

- 28% of job trainees were from DACs (disadvantaged communities).
- 25% of job trainees were local hires.
- 53% of job trainees were targeted hires.
- 15 trainee positions were filled by tenants.
- 28 trainees reported being hired by their contractor for continued employment.
- Trainees worked an average of 70.75 hours.
- Average trainee wage: \$20.56/hr.
- Trainee demographic should be reflective of the community and the people who are living at the project site.
- Direct solar installation work continues to be the primary type of work completed by job trainees.
- Difficult to track if trainees end up working in permanent position with another contractor/company but the program is tracking if the trainee ends up with a permanent job offer from the contractor that brought them on as a trainee initially.
- Common use case of trainees being used on multiple SOMAH projects during their year of eligibility for SOMAH.

Contractors & JTO Stats

- 100% of completed projects provided paid job training opportunities.
- 100% post-installation contractor survey response rate.
- 534 post-installation surveys completed.
- 850 job training opportunities created by current pipeline of SOMAH projects.
- 63% of SOMAH projects have a local JTO in the same county or within a one-hour drive of the project location.

Trainee Updates

- Solar Career Center Webpage on the CalSOMAH website
 - Includes free online SOMAH-eligible training courses through Heatspring, a resume builder, and a YouTube playlist of SOMAH webinars for trainees and JTO audiences.
 - Hosts job trainee success stories.
- Trainee Communications Plan
 - To ensure trainees are informed about SOMAH and SOMAH-paid training opportunities.
 - Includes a job training newsletter, emails to trainees on upcoming projects in the pipeline and tenant and CBO outreach.

- Offering wraparound services to provide an opportunity for folks who want to work on a project that is not local or convenient for them to commute to.

Job Training Organization Update

- Increased focus on regions with no existing JTO relationships, JTOs with electrical training and JTOs in tribal regions.

JTO Task Force Updates

- Priorities for 2023
 - Complete
 - Hold a workshop on fair hiring practices once a year.
 - In progress
 - Research which JTOs have an electrical trainee card program and which organizations have the potential for offering electrical training programs.
 - Research the potential for an apprenticeship or pre-apprenticeship track focused on solar.
 - Increased collaboration with the AC to provide combined support for the program.
- Apprenticeship Working Group
 - Letters of interest were sent out by the JTO TF Chair and Vice Chair
 - Received 40 responses from JTOs and 14 from contractors and subcontractors.
 - Sustineo Construction
 - Contractor-led mechanical installation of solar.
 - JTO TF submitted letter of support for Sustineo's application.
 - Not approved yet – proposed and under consideration by CA Division of Apprenticeship Standards.
 - Decision expected in summer/early fall of 2024.

Contractor Updates

- Webinars
 - Job Training Overview Training provides contractors and applicants with an overview of SOMAH's job training requirements and resources available to support a successful job training experience.
 - Previous webinars included Fair Chance Hiring and Inclusive Hiring Practices to encourage contractors to hire from DACs and targeted populations.
- Resources Page
 - Curated playlist for contractors on YouTube.
 - Contractor FAQ.
- Goal to publish an updated Job Safety Binder by end of the year

Making the Job Training Portal More User Friendly

- Purpose: Help contractors find trainees to fulfill their SOMAH training requirements.
- Improving communications with trainees and contractors.
- Technical updates and automations.
- General adjustments and streamline job trainee intake form and job entries.
- Continue streamlining and space for final edits and additional requests.

Workforce Needs Assessment

Walther concluded by presenting a preliminary analysis of SOMAH's Workforce Needs Assessment. The purpose of the assessment is to gauge hiring, training and workforce development needs for the PA to support contractors with 1) complying with SOMAH's job training requirements, 2) staying competitive in the solar industry and 3) to improve and/or add to SOMAH's current WFD services in order to increase participation in the program. Assessment participants include active contractors, subcontractors and eligible contractors.

Discussion

- **AC Member**: It is good to see that information on trainee retention and tracking long-term placement is somewhat addressed by workforce needs assessment.
- **AC Member**: A trainee's proximity to projects plays a very important factor. They may be able to participate in more or less projects depending on where they live.
- **AC Member**: How has it been going with having tenants as job trainees?
- **SOMAH PA**: There have been 15 SOMAH projects where tenants have participated as job trainees. The PA has found that some contractors were unaware of the opportunity to use tenants as trainees. We will continue to highlight and market this option.
- **AC Member**: It is great that you are tracking all of this.

Wrap-up & Next Steps

Marisa Villarreal, SOMAH Program Manager

Marisa wrapped up the meeting by reviewing action items and administrative reminders for the AC. The Q4 meeting will be a joint meeting with SOMAH's JTO Task Force and is expected to take place in early December.