

SOMAH Public Forum Notes

Date: Wed, September 1, 2021

Time: 1-2:30pm

Purpose:

The purpose of the SOMAH Public Forum is to share program progress and updates while creating an opportunity for program stakeholders and participants to ask questions, share concerns and provide feedback. This forum will provide an update on key program stats and an overview of the recently approved Handbook 4.0 as well as the PA's efforts to increase DAC participation.

The forum is suited for multifamily affordable housing property owners, solar contractors, community-based organizations (affordable housing, environmental justice, tenants' rights, etc.), investor-owned utilities, community choice aggregators and job training organizations interested in getting program updates and providing feedback to the SOMAH Program Administrator.

Welcome & Introductions

Mai Fang, SOMAH Program Coordinator, gave an overview of the purpose of the forum, agenda, and introduced members of the SOMAH Program Administrator Team (SOMAH PA). Mai began by stating SOMAH stands in solidarity with Black Lives Matter and with all who are fighting for a just and equitable future. Further acknowledgements continued for standing in solidarity with SOMAH's CBO partners like Asian Pacific Environmental Network (APEN), condemning the violence against California's Asian communities.

Session 1: Program Update

Mai began with an overview of application statistics and a funding update that incentive funds are currently available in all five program territories with no waitlists.

Utility Territory	# of Active Applications
Pacific Gas & Electric	221
Southern California Edison	117
San Diego Gas & Electric	57

Liberty	1
PacifiCorps	2
Totals	371

The PA is proud to report 29% active applications are located in DACs, which continues to be a targeted focus of the SOMAH program. Additionally, tenants are slated to receive 86% of the electricity generated from SOMAH installations. Both of these metrics have held steady through 2021. The active applications are also estimated to serve more than 30,000 tenants with an average system size of 160 kW. There are currently 12 participating contractors in the program, with six additional subcontractors reported at this time. The pipeline also supports nearly 700 training opportunities with more than 47,000 projected training hours. These job training opportunities equate nearly \$950,000 in projected wages leveraging over 60 job training organization relationships.

At this time there are 132 SOMAH projects currently eligible for Progress Payments. So far, five Progress payments have been issued (\$1,639,041) with 1 additional project that is currently being processed. Completed projects and incentive payments have had increased activity as well with 6 final incentive payments issued (\$2,193,067), and seven additional projects close behind at Incentive Claim Milestone, inspection, and pending payment. The PA anticipates additional project completion activity through the end of the year with a significant increase of activity in 2022. 14 projects have upcoming incentive claim due dates in Q3 & Q4 2021 and 154 projects with incentive claim due dates in Q1 & Q2 2022.

Mai continued with a reminder on job training resources and expectations with an emphasis on jobsite safety. She acknowledged the PA has received several complaints from job trainees and their job training organizations and that the PA takes these concerns very seriously. The PA has discussed these issues both internally and with key program stakeholders.

Mai shared an update on Verdant's Phase II report which is almost complete. Data was collected August 2020 through June 2021 through interviews, web surveys, IOU data requests, impact analyses, and metric assessments. The draft report will be released on September 7, 2021 with a public webinar on September 17, 2021. The final report is due to be released in October 2021.

Mai also provided an update on incentive step-down update, noting the NREL report used to determine the % of the incentive step-down was received by the SOMAH PA earlier this week. The current extension to the incentive step-down ends on October 29. The PA team will share an analysis and updated incentive amounts via a separate webinar at the end of September or early October.

Mai continued with a reminder about the upcoming end to the option to postpone the Energy Efficiency Compliance Milestone (EECM) effective September 13, 2021. This timeline is tied to 90 days after the reopening of California (June 15). The PA will continue to honor any projects that are approved for EECM postponement with no impacts to those project timelines. The only change is that the option to apply for EECM postponement will no longer be offered starting on September 13 at 5pm.

Mai concluded with a summary of the PA's monitoring of the July 27 CSLB board vote to restrict the installation of energy storage systems to C-10 contractors. The vote means beginning November 1, 2021 the C-46 license will no longer be permitted to install storage systems. The Board's decision does not impact the "A" General Engineering and "B" General Building Contractor or C-10 Electrical Contractor licenses to install energy storage systems with their respective classifications. C-46 licensed contractors will still be able to install solar photovoltaic systems under the scope of their license.

The PA then solicited feedback from contractors in attendance regarding the CSLB license update with poll questions.

Question 1: Are contractors or program participants aware of these changes?

Results: 54% Yes / 45% No

Question 2: What aspects of your SOMAH projects (either active or prospective) would be impacted by this licensing update?

Results: 40% All of the above / 60% I'm not sure

Session 1 Q&A:

Q: Anna Solorio, CHOC Housing (Community Housing Opportunities Corporation) - How many projects have been completed? How many units does this include?

A: There are 371 SOMAH projects currently in PowerClerk covering 30,438 tenant units. Of those projects, six are completed and paid to date (703 tenant units) with seven more projects (533 tenant units) that have been interconnected and are currently working through application closeout within the incentive claim milestone.

Session 2: Making the most of SOMAH's TA Services

Zara Jamshed, SOMAH Technical Assistance Specialist kicked off the session by highlighting SOMAH's intentional program design to provide personalized technical assistance (TA) to bridge knowledge gaps and to help facilitate solutions to common

complexities with going solar. They noted that technical assistance also acts as a consumer protection mechanism where TA staff can help property owners identify key metrics as they assess bids from contractors. The TA services cover a wide range of project-related elements, including solar feasibility, financial analysis, contractor bidding, and interconnection support as well as referrals to other energy programs which can be taken advantage of throughout the project lifecycle, for anyone enrolled in SOMAH.

Zara continued with a focus on the solar feasibility report which provides property owners with the knowledge they need to determine if solar is right for their property. The report can help property owners understand the return on their investment and an overview of pocket costs so that they have the information and resources needed to make the best decision. Property owners are provided with a full TA report that includes a summary of the solar feasibility details, estimated SOMAH incentive amount, and a financial and electric bill analysis that they can use as an education tool. From the report, property owners are able to learn what may be typical for their property and can use the report as a resource when initiating conversations with potential solar contractors.

Zara then shared about another TA service, Solar Feasibility Lite, which is an option for property owners to receive a condensed version of the solar feasibility report highlighting key details that can help a property owner decide if SOMAH is a good fit for their property. The Solar Feasibility Lite report includes a preliminary system design and sizing, estimated incentive amount, and a concise financial analysis and can be produced on a quicker turnaround time.

Luis Amar, SOMAH Technical Assistance Specialist, shared more about how the SOMAH PA is available to help property owners make informed decisions about the most viable financing pathway for their property. The PA can provide educational resources and answer key questions about different system ownership options, information about leveraging other federal, state, and local resources, and serves as a thought partner to property owners.

Luis spoke on energy efficiency support to reduce electric usage through energy efficiency upgrades which decreases the system size, cost, and maintenance required for the PV system. He highlighted that the PA can make direct referrals to the program administrators and connections to programs for building electrification and electric vehicle charging. He also confirmed that TA services can also include reviewing the requirements for the Energy Efficiency Compliance Milestone and supporting questions on the two compliance pathways.

Luis continued with information on contractor bidding support reminding participants that SOMAH has an Online Bidding Tool that supports property owners's search to find eligible contractors in their project area, select contractors to bid on their project, and

receive competitive project bids. The Project Bid Template helps to provide an apples to apples comparison across all project bids so that the project and cost details included can be easy to understand.

Luis closed with a note on Job Training requirements. He summarized the PA is available to provide technical assistance with job training to support participants in using the job board to post and manage open SOMAH job trainee positions, identifying and recruiting eligible job trainees, and leveraging the SOMAH Job Training Portal resume bank and connections with local job training organizations.

Staci Givens, SOMAH Program Manager continued with the suite of TA services highlighting no-cost Tenant Education Services to meet program requirements of notifying tenants about the property's participation in SOMAH and providing them with SOMAH-approved information on energy efficiency and energy bill interpretation. She specified the PA can provide a personalized tenant education workshop, help property owners prepare to ensure tenant education requirements are fulfilled, or set up a meeting with a tenant services expert. All of these free services are available to any project that has received a Proof of Project Milestone approval and can be requested online at calsomah.org/te-services-intake-form.

Staci focused on a case study of a real SOMAH project in Oakland, CA with a property built in 1979 offering 100 one-bedroom apartments to seniors aged 62 and over. TA services were provided to help make the property owner's solar journey as simple as possible including evaluating the solar potential and feasibility at the property and completing financial assessments with a cost/savings analysis. Support for this property owner also included referrals to local energy efficiency programs where the property owner learned how whole-building and direct install upgrades could impact the property's operating costs.

Staci shared how the TA team helped the property owner navigate the Online Bidding Tool, where he ultimately selected a contractor to move forward with after reviewing and comparing the project bids with a better understanding. Any questions about a solar project you are considering, or about the TA services can be sent via email to TechAssist@calsomah.org.

Session 2 Q&A:

Q: Richard Esteves, Quality Conservation Services - Is active participation in the in-unit energy savings assistance (ESA) a requirement of the SOMAH program? It sounded as if this was an optional choice for the building owner. Which is correct?

A: While the SOMAH program works hand in hand with the ESA Program staff to refer properties that may be eligible and interested in the ESA Program offerings, ESA participation is NOT a requirement of the SOMAH Program. All projects are required to submit a list of tenant addresses that the SOMAH PA hands over the investor-owned utilities to follow up on. Additionally, we strongly recommend all properties enrolled in

SOMAH to co-enroll in the free energy offerings through the ESA and other clean energy programs. Lastly, sharing ESA materials is part of the Tenant Education Requirements.

Q: Stephanie Silen-Flood, Premier solar Energy - Can you help with community solar projects if they incorporate somah eligible properties?

A: Unfortunately, community solar does not pair well with SOMAH. SOMAH requires enrollment in the SOMAH VNEM tariff for onsite solar. As a result of the program requirement for the SOMAH VNEM tariff, SOMAH projects are not able to pair with a community solar installation.

Q: Richard Brown, Sunworks International - Do contractors have to be registered with SOMAH online to participate in SOMAH?

A: Yes, contractors need to be registered to participate in the SOMAH program. Contractors must attend a contractor eligibility training webinar which is typically offered bi-monthly. After completing the webinar, the PA will register your company on the eligible contractor list in PowerClerk and get you set up with an account to participate in the online bidding tool platform. The next training is being offered on September 14, 2021.

Q: Richard Brown, Sunworks International - Are consultants allowed to help in terms of PV or solar design?

A: The SOMAH PA can provide high level sizing estimates as part of the solar feasibility report, however these designs are not meant to replace the solar design process. All participants should pursue solar design specifics through their selected licensed contractor.

Q: Richard Brown, Sunworks International - C46 or B or C-10 required? Is a NABCEP certification enough?

A: In order to be an eligible SOMAH contractor you must have an active A, B, C-10 or C-46 license from the California Contractors State License Board. NABCEP certification is encouraged but not required.

Session 3: Program Changes

Chris Walker, SOMAH Program Manager, shared a closer look at upcoming program changes, focusing on the next iteration of the SOMAH handbook. The high level handbook changes Chris spoke about included the Code of Conduct, CalEnviroScreen 3.0/4.0, and compliance with Job Training and Tenant Education requirements. Chris began with a timeline and content overview of the previous SOMAH handbooks, outlined in the table below.

Version	Major Updates	Status
Handbook 1.0 (original)	-----	March 2019
Handbook 2.0	<ul style="list-style-type: none"> ● SOMAH & MASH Stacking 	May 2020
Handbook 3.0	<ul style="list-style-type: none"> ● Progress Payments 	December 2020
Handbook 4.0	<ul style="list-style-type: none"> ● Application Pipeline Management (Lottery) ● Required Notification for Early Job Trainee Termination ● System Changes Affecting Incentive Amounts ● Assorted minor updates 	May 2021

Chris provided additional information on the Participant Code of Conduct summarizing that it is designed to set minimum standards of conduct and provide grounds for recourse if breached. He explained the PA has modeled it after the IOU Supplier Codes of Conduct and plans to include it as an appendix to SOMAH Handbook. Efforts to create the Code of Conduct were motivated by job trainee complaints with the intent to ensure safety and that SOMAH's equity intent is upheld across the program.

Chris further explained the enforceable sections of the code of conduct are based on existing laws, regulations, and program requirements with sections on worksite safety, employment and labor protections, consumer protection and ethical communication, data security and privacy. Additionally, Chris noted the SOMAH PA is not set up to conduct investigations and enforcement of our code of conduct must therefore be based on objectively determined breaches of the code of conduct. Penalties will be tied to the existing system of infractions, failures, removal and based on severity as determined by the SOMAH PA team. He highlighted that extensive planning and stakeholder discussion process has reaffirmed that folks expect a very high standard of conduct from this historic equity program - one working in, for, and with low-income and disadvantaged communities to improve access to the benefits of solar energy, from bill credits to job opportunities. This Code of Conduct is another pathway to ensure everyone is safe and respected. Chris outlined the SOMAH PA has prioritized stakeholder engagement on the Code of Conduct through collaboration with SOMAH Advisory Council, SOMAH CBO Partners, SOMAH Job Training Organization Task Force, Inside and outside legal counsel, and CPUC Energy Division.

The session continued with an explanation of CalEnviroScreen versioning updated to the handbook and clarified that SOMAH will uphold eligibility for both the current and

the immediately previous version of CalEnviroScreen which will expand rather than shrink the number of eligible properties. With the transition from CES 3.0 to CES 4.0, the PA estimates approximately 185 newly eligible SOMAH properties.

Chris concluded the handbook updates with an overview on handbook update to compliance with Job Training and Tenant Education requirements. The update aims to clarify that the PA may issue infractions, failures, etc., for noncompliance with job training and tenant education requirements by expanding the existing system of infractions and failures. Chris explained that this change is intended to encourage compliance with job training and tenant education requirements and provide further options for enforcement, beyond denial of incentive payment. The PA plans to file the Code of Conduct with the handbook revisions including what was highlighted for CalEnviroScreen 3.0/4.0, and compliance with Job Training and Tenant Education requirements which will go into effect upon handbook approval.

The session ended with a reminder the PA anticipates that the forthcoming third party program evaluation report will recommend further changes to program requirements and processes to strengthen the program. Verdant (third party evaluator) will host a webinar on September 17 and the PA encourages stakeholders to attend, share feedback, and ask questions.

Session 3 Q&A:

Q: Richard Esteves, Quality Conservation Services - Please clarify that the option to not participate is that of the individual tenants, the SOMAH property must allow access and opportunity for the ESA treatment of in-unit work for the tenants.

A: All projects are required to submit a list of tenant addresses that the SOMAH PA shares with the investor-owned utilities for follow up. Additionally, we strongly recommend all properties enrolled in SOMAH to co-enroll in the free energy offerings through the ESA and other clean energy programs. Sharing ESA materials is part of the Tenant Education Requirements. Later on, the IOU's ESA team will reach-out to tenants about their ESA opportunities and it is up to the tenant if they want to and are able to enroll.

Q: Chiara Arellano, Rising Sun Corp. - Can you speak a bit more to the ways that the new contracting license requirement will affect projects and whether there will be ramifications for the workforce development goals of the program?

A: The CSLB board decision restricts storage installations restricted to C-10 license. Solar PV installation will remain viable under C-46, A, B, and C-10. A large share of projects have reported they intend to also install batteries. These new requirements may be restrictive of license types that can manage that work, as well as crew composition.

Looking Ahead & Next Steps

Mai Fang shared a call to action for participants to be the face of SOMAH. The PA is soliciting feedback and looking for participants to interview, photos from projects, and stories or testimonials about their SOMAH experience. Interested parties should email contact@CalSOMAH.org.

Mai also spoke on the importance of collaboration for the success of SOMAH. She highlighted a recent ribbon cutting event that was held at the Sand Creek community in Orosi, CA last week. The SOMAH PA can help plan and organize these events with partners. Interested parties can contact media@CalSOMAH.org for more information.

The following dates were shared for upcoming SOMAH events:

- **Tuesday, September 14, 10am-12pm:** Applicant and Contractor Eligibility Training
- **Friday, September 17, 10-11:30am:** Third-Party Evaluation Public Webinar [Phase II Results]
<https://bit.ly/38phM9o>
Event number: 146 888 5652
Event password: rA29 (7229 from phones)
- **Thursday, September 23, 1-2pm:** San Joaquin Valley Affordable Housing Summit: Preparing for Growth in the Valley - How Grid Resiliency Creates a Secure and Sustainable Future (Panelist)
- **Tuesday, September 21, 10-11am:** Job Training Webinar for Contractors
- **Tuesday, October 12, 12-1 pm:** Tenant Education Webinar
- **November** (date TBD): "Know Your Rights" Workshop for Job Trainees
- **November** (date TBD): Fair Chance Hiring Workshop for Contractors

Mai concluded with an overview of next steps, noting the Public Forum slide deck would be emailed to registered participants on CalSOMAH.org. Public Forum notes will follow in a week's time. The Q4 Public Forum is scheduled for November 3 with more information to come.

For additional questions and feedback, please contact the SOMAH PA:

Email: contact@CalSOMAH.org

Web form: CalSOMAH.org/contact-us

General hotline: 858-244-1177 ext. 5

Tenant hotline: 800-843-9728