



Solar on Multifamily  
Affordable Housing

SOMAH  
**Semiannual  
Progress Report**

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Reporting period  
January 1, 2022 – June 30, 2022



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# 1. Executive Summary

As SOMAH embarks on its third program year, the sixth Semiannual Progress Report (SAPR) shares details of increased project completions with interconnected and paid SOMAH projects while navigating a slower intake of new overall application submissions. The SOMAH Program Administrator's (PA) goals continue to emphasize understanding and adapting to current environmental and industry challenges while striving to implement a resilient and successful program. Though participants reported industry impacts such as historic inflation and supply chain challenges causing delays in construction timelines and project completion, the program celebrated an additional 30 completed and paid projects thus far in 2022. Additional funding was released for PG&E, SCE, SDG&E and PacifiCorp, which maintained plentiful funding for all IOU territories and continues to allow for immediate application review with no waitlists. Building on the program's completed third-party evaluation process, the SOMAH PA has continued its monitoring, evaluation and research efforts to garner valuable feedback for the program. Q1 and Q2 2022 efforts included launching the Property Owner Project Completion Survey and finalizing analysis for property owner focus groups and interviews. Marketing, education and outreach (ME&O) efforts have resumed in-person outreach as COVID-19 restrictions decrease. In-person property owner conferences, tenant education workshops and ribbon-cuttings have helped celebrate SOMAH systems and their benefits to tenants and communities. As projects close, the SOMAH PA is able to showcase the impact SOMAH contributes to communities through success stories and video testimonials that have been posted on the SOMAH website and will be distributed for outreach purposes. The percentage of DAC projects in the program held steady at 35% after a significant increase in the second half of 2021. This stability of increased DAC participation continues to exemplify SOMAH's commitment to supporting disadvantaged and underserved communities across the state. Stakeholder outreach by the SOMAH PA, SOMAH-contracted CBOs and new co-marketing partners have helped increase program awareness with external webinars and program announcements.

## 1.1 COVID-19 Acknowledgement

The COVID-19 public health crisis, and the SOMAH PA's response, continued to impact the program in this reporting period. While the world has continued to navigate the impacts of the COVID-19 public health crisis, the SOMAH PA continues to acknowledge the impacts and lingering effects to SOMAH participants, stakeholders and the solar industry. The SOMAH PA understands that the industry will be affected for some time to



come and continues to encourage participants to provide feedback on the barriers and impacts they are facing. The SOMAH PA continues to receive and solicit participant and stakeholder feedback through outreach and engagement in order to support and maintain a pipeline of active SOMAH projects. The current project queue has demonstrated that participants are committed to participating in SOMAH and are making their best efforts to adapt and evolve in the new environment resulting from the public health crisis. Despite these impacts, the program has continued to see projects progress with their design, construction and interconnection efforts. The SOMAH PA maintains a dedicated webpage, [CalSOMAH.org/COVID19](https://CalSOMAH.org/COVID19), to provide the most up-to-date program information and resources on this topic. The SOMAH PA remains committed to prioritizing health and safety during this time, while working to advance the goals of the SOMAH Program and help build a resilient California.

## 2. Background

The Solar on Multifamily Affordable Housing (SOMAH) Program provides financial incentives for installing photovoltaic (PV) energy systems on multifamily affordable housing. The program is designed to deliver clean power and credits on energy bills to hundreds of thousands of California's affordable housing residents. The program was created by California Assembly Bill (AB) 693 (Stats. 2015, Ch. 582), authored by State Senator Susan Talamantes Eggman (D-District 05) (then Assemblymember) and signed by Governor Jerry Brown in 2015. Senate Bill (SB) 92 (Stats. 2017, Ch. 26), adopted with the 2017-18 State Budget, further clarified the budget for the program. California Public Utilities Commission (CPUC) Decision (D.)17-12-022 (effective Dec. 14, 2017) implemented AB 693 and changed the name of the program to the Solar on Multifamily Affordable Housing (SOMAH) Program to distinguish it from other state clean energy and low-income solar programs. D.17-12-022 established the program's budget, incentive structure and eligibility policies, among other items.

The SOMAH Program serves electric utility and community choice aggregator (CCA) customers in the territories of Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), San Diego Gas & Electric Company (SDG&E), Liberty Utilities Company and PacifiCorp. Funded through greenhouse gas (GHG) allowance auction proceeds, SOMAH has a program budget of up to \$100 million annually for 10 years and an overall target to install at least 300 megawatts (MW) of generating capacity by 2030.

The program is determined to be transparent and accountable to the communities it serves. It is administered by a team of nonprofit organizations that provides a host of no-



cost services to maximize participation and community benefit. These services include comprehensive technical assistance for property owners and contractors, tenant education resources and job training opportunities. An advisory council of community advocates provides input into program implementation and helps ensure the program maximizes benefits to the communities it is designed to serve. The SOMAH Program is jointly administered by the Association for Energy Affordability, Center for Sustainable Energy® and GRID Alternatives, in collaboration with the California Housing Partnership and rotating community-based organizations. The SOMAH Program is overseen by the California Public Utilities Commission (CPUC).

## 2.1 Application Pathways: Track A and Track B

The SOMAH Program is designed to accommodate participation at varying stages of a solar PV installation, ranging from initial property owner engagement and assessment of a property's solar installation capacity to projects for which the contractor has already been selected or installations that are underway or recently completed. There are two tracks to apply for a SOMAH incentive: Track A and Track B. The SOMAH PA designed the program with two incentive track choices to tailor the user experience based on the stage of a project, whether the program participant is just starting their journey going solar, has a shovel-ready project or has recently completed the installation. Both tracks provide fixed, capacity-based incentives for qualifying solar energy systems, using the Expected Performance Based Buydown (EPBB)<sup>1</sup> methodology.

Track A is designed for property owners who receive direct program marketing and outreach from the SOMAH PA and its network of community-based organization (CBO) partners. Track A provides upfront technical assistance (TA) services for property owners to supply them with a well-rounded understanding of their property's energy needs and the educational, technical and financial resources that are available to facilitate valuable energy efficiency upgrades and a solar installation. Participants that select Track A have their incentive funding earmarked for the duration of the three-month upfront TA period, prior to a reservation request. Track A participants typically do not have an identified contractor and are guided through a multiple bid process to select an eligible solar contractor for their project. The SOMAH PA has previously noted instances of an owner opting to withdraw from Track A to reapply as Track B after receiving TA services, ahead of the multiple bid process. In these situations, the SOMAH

<sup>1</sup> EPBB incentives are based on the system's capacity and design, which provide an estimate of the system's future performance.





PA will continue working with owners to tailor their experience to support the successful participation of each project, regardless of application track.

Track B is designed for property owners who receive direct program marketing and outreach from an eligible contractor, project developer or similar entity. Projects in this track have already identified an eligible solar contractor who has performed or will provide the client assessment and design services that may include a solar site assessment, initial design, financing options review, contract review, etc. Projects that select Track B are not eligible for upfront TA and may waive the requirement to participate in the multiple bid process by submitting the Multiple Bid Waiver with the Reservation Request Package. Instead of upfront TA, Track B projects are eligible for standard TA, which is further described in Section 3.4, Technical Assistance.

For Track A and B projects, incentive funding will be reserved for 18 months based on the date the Reservation Approval Notice is issued. Figure 1 shows the application steps for Track A and Track B.

**Figure 1 – Track A and Track B Application Steps**



## 2.2 Eligibility Options: Qualification Option A — Low-Income and Qualification Option B — Disadvantaged Communities

Regardless of the application track selected, properties can qualify for the SOMAH Program in one or both ways, known as Qualification Option A and Qualification Option B. A property may be eligible for SOMAH by meeting the requirements of Option A, Option B or both. All properties must be at least five units and meet the definition of deed-restricted, affordable housing in P.U. Code 2852(A)(3)(a)(i) and also meet Qualification Option A or B. Qualification Option A refers to properties in which at least 80% of the units are reserved for households at or below 60% of the area median



income (AMI), and Qualification Option B refers to properties that are located in a disadvantaged community (DAC) as identified by CalEnviroScreen and CalEPA. Section 3.1.1, Applications and Incentive Statistics, further elaborates on each type of the qualification options for the SOMAH Program.

## 2.3 Program Budget

SOMAH has a program budget of up to \$100 million annually, with at least 90% of the funds allocated to incentives and up to 10% allocated to the administrative budget. To ensure transparency for program stakeholders, the SOMAH PA compiles and submits a Semiannual Expense Report (SAER). The SAER tracks expenditures by category, totaling program incentives and administration expenses incurred by the SOMAH PA, CPUC Energy Division (ED) and the investor-owned utilities (IOUs). The SAER is posted twice a year to the California Distributed Generation Statistics [website](#) in conjunction with this Semiannual Progress Report (SAPR).

### 2.3.1 Program Administrative Budget

The administrative budget is shared by the SOMAH PA, CPUC ED and the IOUs. The SOMAH PA tracks the program expenses in four main categories: SOMAH Program Administration; Marketing, Education & Outreach (ME&O); Technical Assistance; and Workforce Development. Figure 2 provides a snapshot from the SAER and outlines total program administrative expenditures through June 30, 2022.

**Figure 2 – Total Program Administrative Expenditures by Category**

Category	
SOMAH Program Administration	\$15,031,220
SOMAH Marketing, Education & Outreach (ME&O)	\$8,619,141
SOMAH Workforce Development	\$1,591,201
SOMAH Technical Assistance	\$1,002,505
SOMAH Evaluation Expenses <sup>2</sup>	\$513,710
Investor-owned Utility (IOU) Expenses	\$3,907,752
Total	\$30,665,529

<sup>2</sup> Prior to January 2022, Energy Division staffing costs were included in error under "SOMAH California Public Utilities Commission (CPUC) Expenditures." CPUC Energy Division staff overseeing SOMAH implementation are not funded through the SOMAH Program. Historical amounts are amended to show the expenditures directed by CPUC Energy Division staff to be spent on evaluation activities that are funded by SOMAH Program administration funds.



More detailed expenditure information can be found at [https://www.californiadgstats.ca.gov/programs/#\\_subsection\\_17](https://www.californiadgstats.ca.gov/programs/#_subsection_17).

### 2.3.2 Program Incentive Budget

The SOMAH PA publishes updated program incentive budget information for each IOU territory to the California Distributed Generation Statistics [website](#) on a weekly basis. Because each IOU territory's annual incentive budget varies based on their specific GHG allowance auction proceeds, the SOMAH PA maintains five individual reservation queues and up to five waitlist queues, when applicable. The funds for each utility territory may be released at different times, with the collections based on each utility's Energy Resource Recovery Account (ERRA) or Energy Cost Adjustment Clause (ECAC). PG&E and PacifiCorp funding are released quarterly versus the annual lump sum release of the other territories.

A summary of funding releases for the first half of 2022 includes the following territories and dates: PG&E (April 20, 2022 and June 14, 2022), SCE (June 14, 2022), SDG&E (June 14, 2022) and PacifiCorp (Feb. 15, 2022 and June 14, 2022). Figure 3 summarizes the committed and remaining budget for the SOMAH Program. Figure 4 summarizes the program dollars collected by fiscal year to date and identifies application totals and available program funds.



**Figure 3 – Project Capacity and Budget**

		Waitlist		Earmarked		Pending Reservation		Reserved		Completed		Application Totals		Total Budget (\$)	Remaining Budget (\$)
		Capacity (MW)	Budget (\$)	Capacity (MW)	Budget (\$)	Capacity (MW)	Budget (\$)	Capacity (MW)	Budget (\$)	Capacity (MW)	Budget (\$)	Capacity (MW)	Budget (\$)		
PG&E	Track A	0	0	0.055	176,206	0	0	0.116	295,404	0	0	0.171	471,610	195,076,849	133,816,172
	Track B	0	0	0	0	1.406	2,950,921	26.978	54,863,961	1.612	2,974,185	29.996	60,789,067		
	Total	0	0	0.055	176,206	1.406	2,950,921	27.094	55,159,965	1.612	2,974,185	30.167	61,260,677		
SCE	Track A	0	0	0	0	0	0	0.344	932,317	0	0	0.344	932,317	268,718,659	212,952,120
	Track B	0	0	0	0	3.239	7,037,241	17.778	38,796,097	5.096	9,000,884	26.113	54,834,222		
	Total	0	0	0	0	3.239	7,037,241	18.122	39,728,414	5.096	9,000,884	26.457	55,766,539		
SDG&E	Track A	0	0	0	0	0	0	0	0	0	0	0	0	67,152,167	49,708,005
	Track B	0	0	0	0	0.504	1,270,439	6.049	12,617,921	1.770	3,555,802	8.323	17,444,162		
	Total	0	0	0	0	0.504	1,270,439	6.049	12,617,921	1.770	3,555,802	8.323	17,444,162		
PacifiCorp	Track A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0	0	6,170,225	5,955,496
	Track B	0	0	0	0	0	0	0.112	214,729	0	0	0.112	214,729		
	Total	0	0	0	0	0	0	0.112	214,729	0	0	0.112	214,729		
Liberty Utilities	Track A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0	0	1,751,447	1,470,907
	Track B	0	0	0	0	0	0	0.148	280,540	0	0	0.148	280,540		
	Total	0	0	0	0	0	0	0.148	280,540	0	0	0.148	280,540		
TOTAL	Track A	0	0	0.055	176,206	0	0	0.460	1,227,721	0	0	0.515	1,403,927	538,869,347	403,902,700
	Track B	0	0	0	0	5.149	11,258,601	51.065	106,773,248	8.478	15,530,871	64.692	133,562,720		
	Total	0	0	0.055	176,206	5.149	11,258,601	51.525	108,000,969	8.478	15,530,871	65.207	134,966,647		



**Figure 4 – Cumulative Program Budget**

	2016 Budget (\$)	2017 Budget (\$)	2018 Budget (\$)	2019 Budget (\$)	Under- collections True-up (\$)	2020 Budget (\$)	2021 Budget (\$)	2022 Budget (\$)	Application Totals (\$)	Total Budget (\$)	Remaining Budget (\$)
PG&E	1,740,992	4,359,110	39,330,000	33,963,300	31,620,584	34,898,605	28,448,280	20,715,978	61,260,677	195,076,849	133,816,172
SCE	2,733,251	4,536,250	35,213,205	36,768,272	45,542,591	37,689,090	40,208,400	66,027,600	55,766,539	268,718,659	212,952,120
SDG&E	0	0	9,270,000	9,104,076	11,343,785	10,294,957	9,831,156	17,308,193	17,444,162	67,152,167	49,708,005
PacifiCorp	422,443	961,291	1,009,512	1,150,528	0	1,177,394	1,090,332	358,725	214,729	6,170,225	5,955,496
Liberty Utilities	132,440	258,329	314,706	419,517	0	326,327	300,128	TBD	280,540	1,751,447	1,470,907
<b>TOTAL</b>	<b>5,029,126</b>	<b>10,114,980</b>	<b>85,137,423</b>	<b>81,405,693</b>	<b>88,506,960</b>	<b>84,386,373</b>	<b>79,878,296</b>	<b>104,410,496</b>	<b>140,057,670</b>	<b>538,869,347</b>	<b>403,902,700</b>



## 3. Program Progress — Key Performance Areas

The overall SOMAH Program budget is allocated between incentive budgets and administrative budgets. The SOMAH PA administrative budget is further tracked through four categories: Program Administration, ME&O, Workforce Development and Technical Assistance. The following sections describe progress to date and notable metrics in each of the four categories.

### 3.1 Program Administration

The SOMAH Program opened on July 1, 2019, which included the opening of the online application database (PowerClerk) for application submissions, launching the online bidding tool and commencing the publication of program statistics through the SOMAH Incentive Budget Report and SOMAH Working Data Set on the California Distributed Generation Statistics [website](#). The first iteration of the Semiannual Expense Report (SAER) was submitted on July 31, 2019, and the Semiannual Progress Report (SAPR) on January 31, 2020.

#### 3.1.1 Applications and Incentive Statistics

SOMAH continues to have ample funding available in all five IOU territories, with an available incentive budget of more than \$400 million across the program at the end of June 2022. The SOMAH PA does not forecast any program waitlists in the immediate future based on the total amount of available funding along with the application submission trends in 2022, and no IOU territory has had a waitlist since Q4 2020 (SDG&E). Stakeholders and interested applicants should refer to the [Program Funding page](#) on CalSOMAH.org for the most up-to-date information on recently released and available funding per territory and can subscribe to the [SOMAH email list](#) for real-time notifications when additional funding is released.

There are two main ways for previously allocated funds to become available for other projects. First, a project may be canceled by the SOMAH PA due to missed deadlines or not meeting program eligibility or voluntarily withdrawn by the applicant or host customer. Second, incentive funds may become available through the course of application review. For example, adjustments made to system size after receiving consumption data from the IOU will affect the reserved incentive amount. The SOMAH PA has observed that nearly all projects will adjust their system size after receiving site consumption data during the Reservation Request Milestone (or during upfront technical assistance for Track A projects), therefore, modifying the requested incentive with the system size adjustment. With adjustments like this, the previously allocated



funds are then returned to the pot of available funding or applied to waitlisted projects (when applicable) through an ongoing reconciliation process by the SOMAH PA. Similarly, the program maintains a small buffer in each territory's budget to accommodate potential increases in system size and incentive amount resulting from consumption data from the IOU, anticipated future load additions, solar sizing tool recommendations or other reasons.

Without an easy method for applicants to retrieve the tenant consumption data before the program application is submitted for review, additional steps are completed by the SOMAH PA and the applicant, which typically result in a longer reservation request review timeline. The PA has been planning and implementing application-related program and process improvements that began during this reporting period. This round of planning and implementation efforts will carry through to the end of December 2022. Stakeholders and interested applicants should refer to the [Apply page](#) on CalSOMAH.org for the most up-to-date information on the application process.

The effects of the COVID-19 public health crisis continue to notably impact application progression and will continue for the foreseeable future as the industry, country and greater world are still navigating logistical challenges of supply chain issues, rising costs from inflation and an evolving workforce that is recovering from abrupt and unforeseen impacts.

**Figure 5 – Application Status by IOU Territory**

Program	Active	Complete/ Incentive Paid	Waitlist	Canceled/ Withdrawn	Total
PG&E	222	12	0	140	374
SCE	121	24	0	74	219
SDG&E	43	8	0	37	88
Liberty Utilities	2	0	0	0	2
PacifiCorp	1	0	0	0	1
<b>Total</b>	<b>389</b>	<b>44</b>	<b>0</b>	<b>251</b>	<b>684</b>

N = 684

Between January and June 2022, a total of 14 applications were submitted to the SOMAH Program. Of these, one new application was submitted in Q1 and 13 submitted in Q2. Six of the new applications were Track A projects, and all were submitted in the larger IOU territories (PG&E and SCE). No 2022 applications were submitted in the SDG&E, Liberty Utilities or PacifiCorp territories. No applications have been submitted to PacifiCorp or Liberty Utilities for some time, with the last Liberty Utilities application

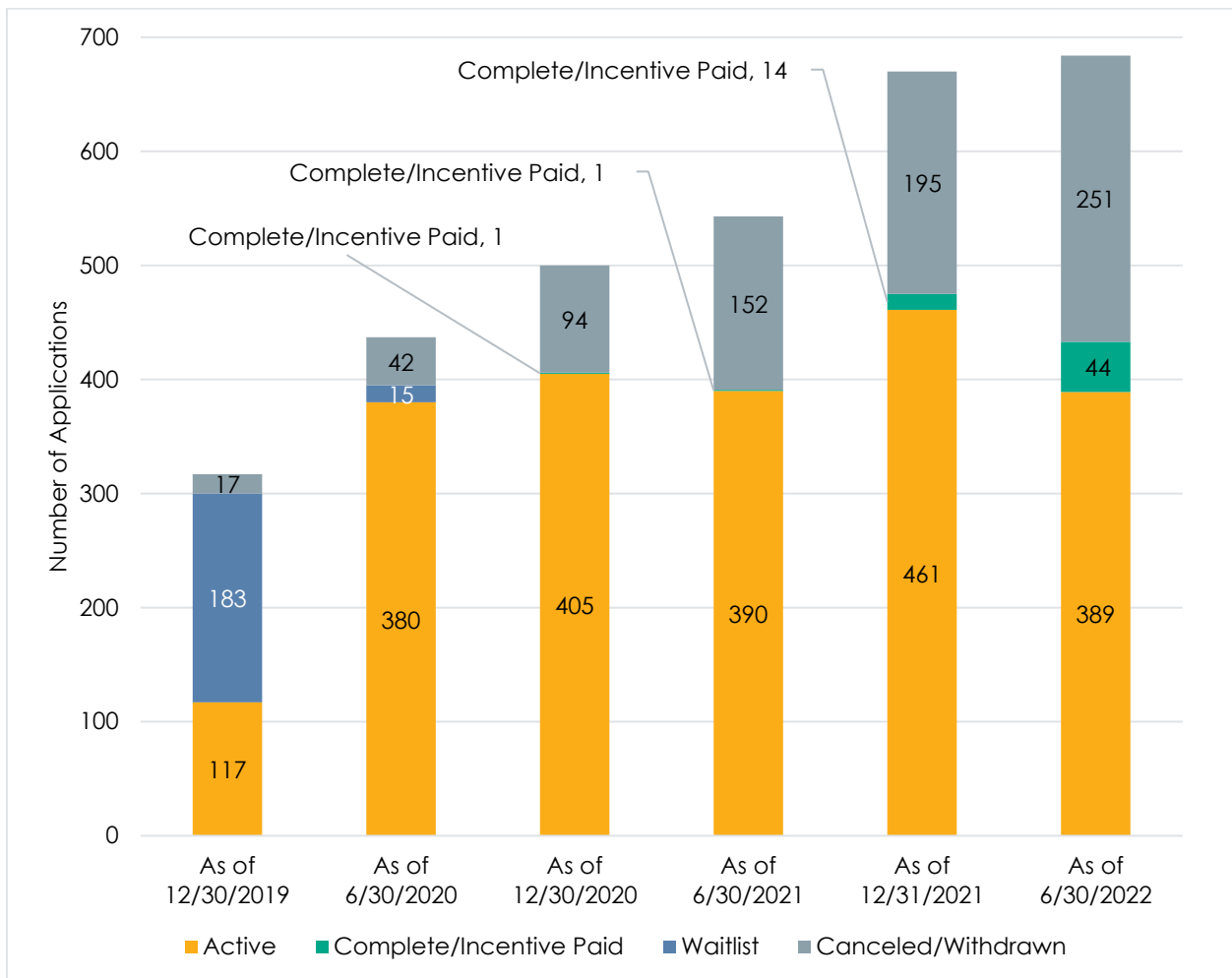


submitted in 2020 and PacifiCorp's last submitted in 2019. The previous reporting periods included 127 new applications in July–December 2021, 43 new applications in January–June 2021, 63 in July–December 2020 and 120 in January–June 2020. The larger (greater than 100 projects) spikes in new application submissions aligned in reporting periods where incentive step-downs occurred, spurring activity when applicants made the effort to submit new applications at the higher incentive rate before incentive levels decreased for the following program year (July 2020 and October 2021).

Both Phase I and Phase II of SOMAH's third-party evaluation highlight the importance of pipeline management, which continues to be a key focal point for the SOMAH PA. Pipeline management efforts aim to increase and maintain program participation with continued new application submissions to meet the programs 300 MW goal. Section 3.2, Marketing, Education and Outreach includes more information about SOMAH's ME&O efforts on pipeline management and increasing program participation and diversity. The SOMAH PA also recognizes that new applications have been submitted at a continued slower pace, which has stalled overall growth and progression toward meeting program goals. This slowdown of new applications was a key factor in the SOMAH PA's pursuit of the Petition for Modification (PFM) effort to increase incentive levels. More information on this effort is discussed in Section 4.2.2, Incentives Petition for Modification.



**Figure 6 – Cumulative Applications Received**



Per CPUC Decision D.17-12-022,<sup>3</sup> the program is required to step down incentives rates annually, and the incentive step-down falls on July 1 of each year. In 2021, the July 1 incentive step-down was postponed due to a pending National Renewable Energy Laboratory (NREL) report used for the incentive step-down analysis. The CPUC approved the SOMAH PA's 120-day extension request, which provided the PA enough time to complete the analysis and stakeholder outreach prior to the Step 3 incentive rate deployed on October 30, 2021. Since the 2021 step-down, new application

<sup>3</sup> Per CPUC Decision, D.17-12-022, "Incentive levels will decrease by the annual percent decline in residential solar costs as reflected by NREL reports, or 5% annually, whichever is less."



submissions have nearly halted, with only 14 applications received since the step-down. Eight of these applications were Track B projects submitted in error, leaving only six Track A projects as valid new submissions in this reporting period. Due to the halt in applications and increasing reported project costs and market data, the SOMAH PA will submit a Petition for Modification (PFM) to propose to eliminate the incentive step-down and raise the program's incentive rates (Incentives PFM). More information on the PFM can be found in Section 4.2.2, Incentive Petition for Modification. With respect to the 2022 July 1 step-down cycle, the SOMAH PA has been granted an extension to pause the incentive step-down until the PFM has been determined by the CPUC. This plan for the Incentives PFM and extension to pause the 2022 incentive step-down was shared with program stakeholders at the Q2 Public Forum on May 25, 2022 and shared in an email blast to the listserv on June 24, 2022. As a result of the extension for incentive step-down for 2022, the previous pattern of increased application submissions prior to July 1 did not occur this year.

The program saw an increase in canceled and withdrawn applications in the first half of 2022, both due to voluntary withdrawals and for failure to provide the required documentation by the required timeline, totaling 56 applications that were canceled or withdrawn during this reporting period. Several of these applications were canceled because they did not meet eligibility criteria for the SOMAH Program after an in-depth review of the documentation provided and conversations with applicants and host customers. Although the SOMAH PA has extended considerable flexibility and support to help stakeholders and participants navigate the new environment caused by COVID-19, participants are still facing new challenges. For example, applicants have cited industry impacts, such as supply chain shortages for steel and other PV system equipment, and shifting financial priorities based on the real-time needs of property owners and tenants. Where appropriate, the PA is making efforts to follow up with these participants after cancellation or withdrawal to determine if the projects are still viable and/or interested in the SOMAH Program.

From continued conversations with contractors and property owners through focus groups, survey responses and evaluation efforts, it is evident that contractors are continuing to prioritize their portfolios of SOMAH projects and are eager to move forward with completing installations and interconnections to finalize projects. Applicants and property owners have often shared valuable cancellation feedback for the projects that have chosen not to or are unable to move forward with the SOMAH Program after initial application submission. This feedback has helped the SOMAH PA better address barriers to program participation, which have been supported through offerings like the previous Energy Efficiency Compliance Milestone (EECM)



Postponement option (ended Sept. 13, 2021); the Progress Payment Pathway, included in Section 3.1.2, Program Payments; the new option to submit select milestones in tandem; and removing application deposits for projects located in disadvantaged communities or on tribal lands. The SOMAH PA is also dedicated to working with the IOUs to liaise with interconnection and SOMAH application efforts and rollout of virtual net energy metering (VNEM) billing credits to tenant and property owners. The PA is committed to supporting SOMAH projects in ensuring timely delivery of SOMAH bill credits for completed projects and has structured ongoing check-ins with the IOUs to support and monitor this effort.

The SOMAH PA maintains consistent communication with SOMAH contractors with active applications to best understand their project timelines and any barriers they may be facing. This interface with contractors and program participants also helps to support forecasting efforts for program activities as well as tailored project assistance for unique application situations. From July 2021 through December 2021, the SOMAH PA processed 24 requests for Incentive Claim Package deadline extensions as application activity picked up for 18-month reservation expiration due dates. Since January 2022, the SOMAH PA has processed an additional 98 requests for Incentive Claim Package deadline extensions. Each extension request is reviewed and addressed on a case-by-case basis. Twenty-seven of the 98 recent extension requests are second or third extension requests for the same project due to extended project delays. This is an increase in second and third extension requests and is the highest volume to report to date. All extension requests to date have cited one of three reasons: 1) circumstances beyond the control of the reservation holder that prevented the system from being installed as described in the Reservation Request Package; 2) there was a problem in the permitting process, and it was the cause of delay; or 3) other. The supporting documentation for these extension requests often relayed information relating to supply chain issues (such as steel for carport installations), permitting delays and interconnection challenges for unique and complex projects, as well as unforeseen engineering challenges.

The SOMAH PA utilizes application milestone deadlines in conjunction with construction timelines in tracking efforts to assess progress of the application queue and broader program planning efforts, like project completion estimates. Of the data points collected at the first application step, the Reservation Request Milestone, the applicant is required to enter the project's projected construction start date or actual construction start date. This information helps identify where the project is in the life cycle of installation at the time of the SOMAH application. While the construction and interconnection processes are bifurcated from the SOMAH incentive application, the



timing of installation and interconnection directly relate to the project's ability to submit for the incentive claim and progress payment (optional). At the start of each milestone after receiving reservation approval, Energy Efficiency Compliance Milestone, Proof of Project Milestone and Incentive Claim Milestone, applicants are prompted to report if construction has started or update the projected construction start date if not. Figure 7 shows the construction timeline information reported in applications through Q2 2023.

**Figure 7 – Construction Timeline Insights**

<b>Date</b>	<b>Construction has Commenced</b>	<b>Projected Construction Start Date</b>
2020	28	5
2021	67	198
Q1 2022	10	53
Q2 2022	2	24
Q3 2022	0	35
Q4 2022	0	2

Impacts on construction plans and project timelines are still prevalent across active projects and will continue to delay project completion timelines for the immediate future. The number of projects reporting to have started construction (including completed projects) significantly increased from 14 projects at the end of 2021 to 107 at the close of June 2022. Application data from earlier in the program, Year 1 and into Year 2, reported that most projects approximated their construction to begin in late 2020 and early 2021. However, with the dramatic shifts across the world in 2020 and continuing impacts into 2022, many of these projects have adjusted their timelines to accommodate delays due to the evolving state of the world and the solar industry. Current data still shows that the majority of projects expected to start construction in 2021. Construction estimates for 2022 have also fluctuated – in the last reporting period, 97 projects were projected to start construction in 2022. There are now 114 projects slated to start construction in 2022. Construction timeline projections have continued to shift through 2022 as projects progress and are better able to forecast construction timelines with more certainty. Despite these challenges, the SOMAH PA hopes to provide support to the pipeline of SOMAH projects that have continued to persevere through uncertainty and continued obstacles. Updated construction start dates will continue to be reported as projects progress to future milestones through their 18-month reservation period, and these timeline updates will continue to be made available in subsequent progress reports. The SOMAH PA predicts that estimated construction timelines will continue to fluctuate while California navigates health and safety

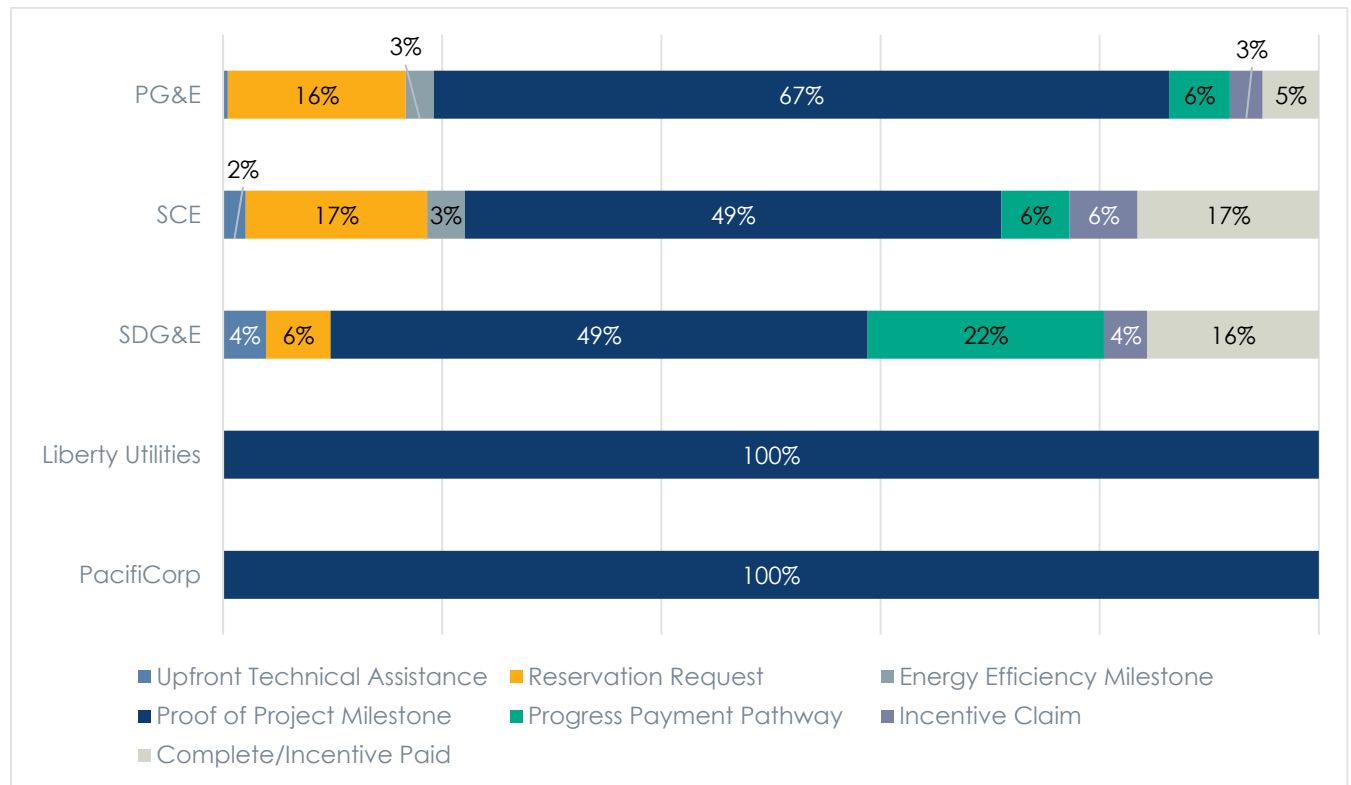


standards statewide. As previously mentioned, the SOMAH PA receives additional information on project timelines and delays with extension requests for projects that are unable to meet their incentive claim deadline due to circumstances beyond their control.

**Figure 8 – Milestones by IOU Territory**

Program	Upfront Technical Assistance	Reservation Request	Energy Efficiency Milestone	Proof of Project Milestone	Progress Payment Pathway	Incentive Claim	Complete/ Incentive Paid
PG&E	1	38	6	157	13	7	12
SCE	3	24	5	71	9	9	24
SDG&E	2	3	0	25	11	2	8
Liberty Utilities	0	0	0	2	0	0	0
PacifiCorp	0	0	0	1	0	0	0
<b>Total</b>	<b>6</b>	<b>65</b>	<b>11</b>	<b>256</b>	<b>33</b>	<b>18</b>	<b>44</b>

**Figure 9 – Percentage of Active Applications by Milestone and Territory**



N=433



The second half of 2021 yielded a large increase of incentive applications prior to the October incentive step-down, which led to increased administrative application activity through the end of the year. However, while those projects worked through their reservation approval and moved on to following milestones, the slowdown of new application submissions was balanced by a significant uptick in project completion with an increase in both the optional progress payment and project closeout activity through incentive claims. The project progress thus far in 2022 has been significant for program goals with completed projects and useful for program data collection at the later Proof of Project and Incentive Claim Milestones. This program progress also aligns with application progression trends, as almost three-quarters of the active and completed projects (74%) have reached or surpassed the Proof of Project Milestone (PPM). PPM indicates contract execution and construction will start shortly after if they have not already broken ground by PPM submission. This figure has increased notably from the last reporting period with only 62% of projects at or beyond PPM at the close of 2021.

Six Track A applications have been submitted in 2022. Of these applications, one project has received Track A approval, two are in the data request process, one is suspended awaiting further documentation, and two have been canceled. Of the two canceled applications, one project's regulatory documentation did not meet SOMAH's compliance period requirement by having less than 10 years remaining on their qualified project period, while the other project applicant was no longer interested in further pursuing SOMAH. Of the Track A projects submitted in Q4 2021, two are currently in the data request process. The lengthier review process for Track A projects can be attributed to the additional support that property owners require during the SOMAH application process as they familiarize themselves with the program requirements, platforms, etc. SOMAH's technical assistance and affordable housing specialists ensure property owners receive guidance through every part of the Track A application process. More information can be found in Section 3.4, Technical Assistance.

**Figure 10 – Applications by Incentive Track**

Assigned Incentive Track	Active	Complete/ Incentive Paid	Waitlist	Canceled/ Withdrawn
Track A	9	0	0	31
Track B	380	44	0	220

N = 684

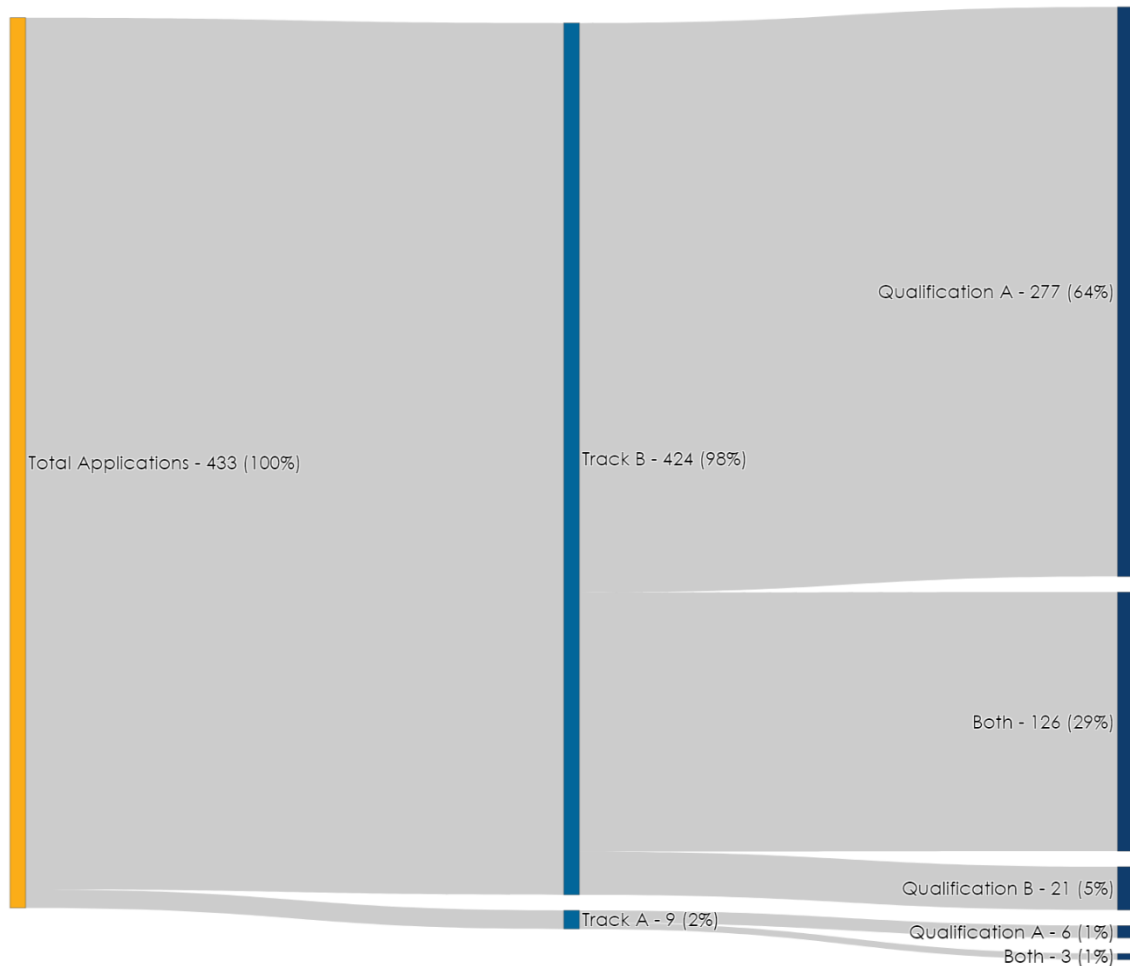


Along with the incentive track type (Track A or Track B) differentiating applications, the eligibility pathway for how the project qualifies for SOMAH is another key distinction for an application. Projects must satisfy one or both of the following options.

- Qualification Option A: 80% of property residents have incomes at or below 60% of the area median income as determined by the Department of Housing and Community Development.
- Qualification Option B: The property is located in a disadvantaged community (DAC) as identified by the California Environmental Protection Agency.
- Both: The property meets the requirement of 80% of property residents having incomes at or below 60% of the area median income and is located in a DAC.

Figure 11 shows the breakdown between application track and eligibility pathways during this period of performance.

**Figure 11 – Property Eligibility by Incentive Track<sup>4</sup>**



Of the 433 active applications<sup>5</sup> received, approximately 65% qualified for the program through Qualification Option A, approximately 5% qualified for the program through Qualification Option B, and approximately 30% qualified for the program through both options. In the first two years of the program, participation of DAC projects fluctuated between 25-30% of SOMAH projects. At the close of 2021, the percentage of applications located in DACs had increased to 34% and has held steady into mid-2022, now at 35% for this reporting period. At the end of 2020, the SOMAH PA provided the

<sup>4</sup> Calculations used for this visual are subject to rounding and total percentages may not equal 100%.

<sup>5</sup> Active applications are those that have not been canceled or withdrawn. This figure includes applications pending reservation approval that have not had their project information fully finalized yet.





Commissioner's Office a memo<sup>6</sup> with potential options for increasing participation by eligible properties located in DACs and conducted stakeholder outreach in 2021 to determine the best path forward. Combined with ME&O strategy and programmatic efforts to prioritize projects located in DACs, the SOMAH PA also included DAC benchmark language in the SOMAH Program Handbook version 5 (Handbook 5.0) that was approved by the CPUC in late April 2022. "In an effort to prioritize and increase participation in DACs, the SOMAH PA has set a programmatic benchmark or target of 40% of all participating SOMAH projects to be located in DACs by 2026. The SOMAH PA acknowledges that this will take the support of program partners and stakeholders and may require new strategies and potential program changes to ensure the program can meet this target," Handbook 5.0, Section 1.1.3, SOMAH Program Goals.

Figure 12 further breaks down the property eligibility statuses by count and percentage to highlight the number of DAC-qualifying properties.<sup>7</sup> The SOMAH PA continues to consider the different ways in which the program can increase participation for DAC-qualifying properties and will continue ongoing work on this effort to meet the benchmark and support overall program goals. Two impactful updates that support increasing DAC project participation in SOMAH are 1) the handbook update to uphold eligibility for otherwise eligible properties within both the current and immediately previous version of the CalEnviroScreen (CES); and 2) the inclusion of federally recognized tribal lands as part of the CES DAC designation. Both of these updates will allow additional potentially eligible properties to qualify for SOMAH through their DAC status for property eligibility. In the spirit of breaking down barriers, the SOMAH Handbook 5.0 also provided the opportunity for the application deposit to be waived for "priority groups" of which the current group includes DAC and tribal projects. As a result, participating projects in DACs and on tribal lands will receive a waiver and are not required to submit an application deposit in order to obtain their reservation approval. The waiver of application deposit fees alleviates a potential financial barrier of up to \$20,000 depending on the size of the solar energy system. The application deposit waiver was rolled out in late May 2022 and has been well received by program participants and stakeholders. Any new applications submitted or projects that are

<sup>6</sup> The January 2021 [Semiannual Progress Report](#) includes a summary of the 2020 CPUC DAC Participation Memo.

<sup>7</sup> DACs are not distributed evenly across the IOU territories. The percentage of census tracts that are DACs in each IOU territory varies, along with the overlap of eligible properties in a DAC by each IOU territory. The SOMAH PA does not know of any properties located in DACs in Liberty Utilities or PacifiCorp territories.



currently in the queue but have not received reservation approval are eligible for the application deposit waiver if they meet one of the priority groups.

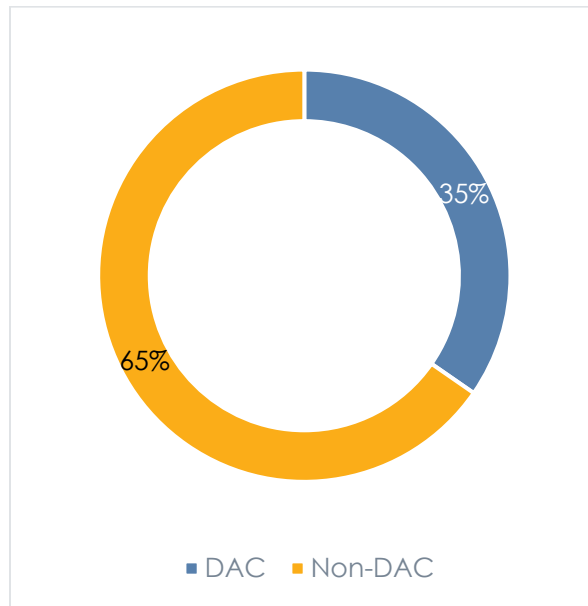
**Figure 12 – Property Eligibility by Reservation Status**

Property Eligibility	Pending Reservation Approval	Reservation Approval Received	Complete/ Incentive Paid	Waitlist	Canceled/ Withdrawn
Option A - 80% of property residents have incomes at or below 60% of the area median income as determined by the Department of Housing and Community Development	31	227	25	0	180
Both A and B	8	105	16	0	53
Option B - The property is located in a disadvantaged community as identified by the California Environmental Protection Agency.	4	14	3	0	17
Data not reported <sup>8</sup>	0	0	0	0	1

N = 684

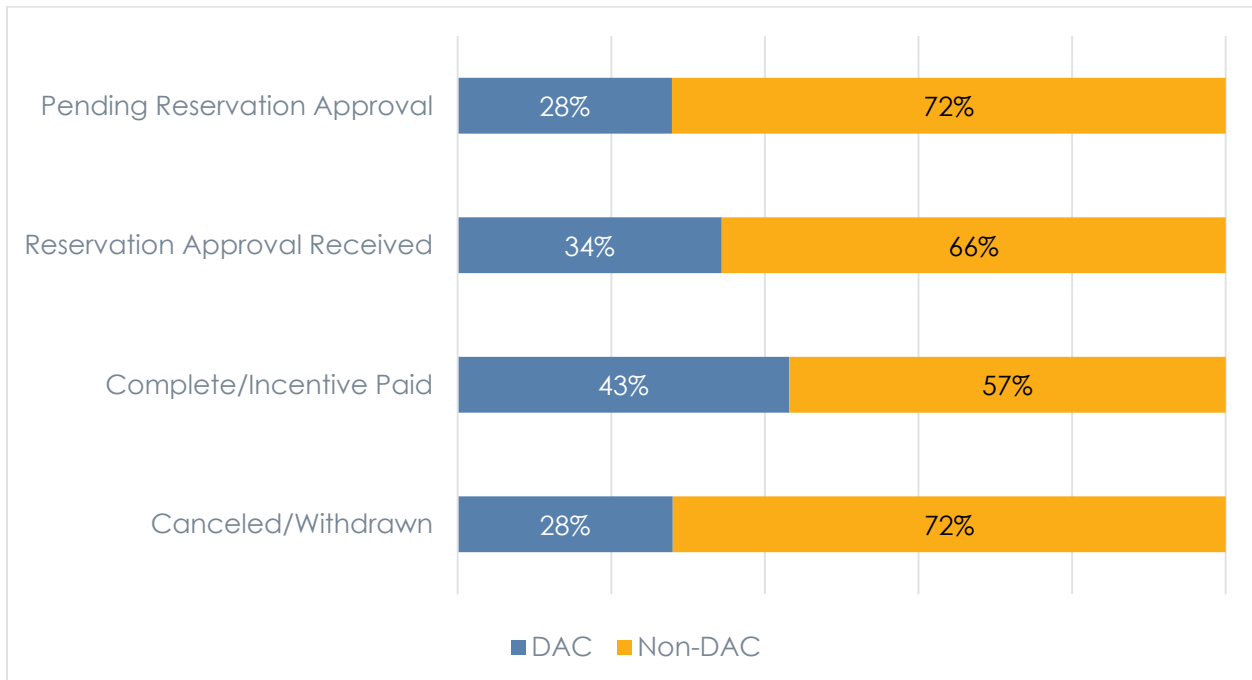
<sup>8</sup> “Data not reported” represents one canceled Track A project that did not submit property eligibility documentation prior to cancellation.

**Figure 13 – Overall Property Eligibility**



N=433

**Figure 14 – Property Eligibility by Reservation Status**



N=683



Reservation request is the application entry point for Track B projects, the majority of SOMAH's application pipeline, and the second application step for Track A projects. The Reservation Request Package is a robust and distinguishable milestone for all projects to complete, including up to 10 required documents and an application deposit (for non-priority groups) before achieving reservation approval. The three main components of the Reservation Request Milestone are the eligibility verification through review of the associated eligibility documentation, IOU data request for consumption data and system sizing and the application deposit before issuing a reservation approval. This approval is an important achievement for projects and for programmatic data and milestone tracking. Approved applications have met all SOMAH Program eligibility requirements as well as furthered their commitment to the program by providing the appropriate application deposit,<sup>9</sup> if applicable. While some projects leave the program prior to receiving reservation approval, program trends have shown that it is far less likely that this will occur after the project reservation request has been approved and the application deposit (if applicable) has been submitted, completing the Reservation Request Milestone and receiving reservation approval.

With active applications being an important indicator of program success, the SOMAH PA maintains a focused effort on supporting and improving the application experience. The PA strives to provide prompt application review as well as consistent participant support throughout the application process. In the spirit of continuous improvement and in response to the third-party evaluation findings, the SOMAH PA focused efforts in Q1 and Q2 on application streamlining with an emphasis on the Reservation Request Milestone. A summary of the proposed changes was shared during the Q2 Public Forum to garner stakeholder feedback, which received supportive comments during the Q&A session. While these streamlining efforts are not currently available, the SOMAH PA plans to include the presented streamlining opportunities in the next version of the handbook that is slated for later this year in Q3-Q4 2022.

The sustained efforts and focus on application review progress during this reporting period increased the number of reservation approvals from 363 at the end of 2021 to 419 at the close of Q2 2022. Eighteen applications are very close to completing the Reservation Request Milestone and are currently pending application deposit receipt

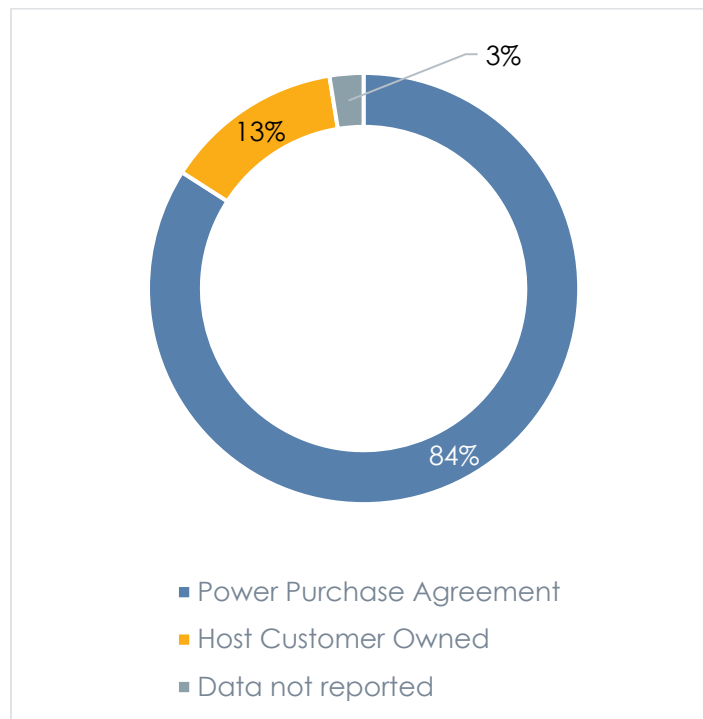
<sup>9</sup> Projects on DAC and tribal lands will receive a waiver and are not required to submit an application deposit in order to obtain reservation approval. Handbook 5.0 allows the application deposit to be waived for "priority groups" of which the current group includes DAC and tribal projects.



before receiving final reservation approval. Most active SOMAH applications have moved past the Reservation Request Milestone and well into the Energy Efficiency Compliance Milestone, the Proof of Project Milestone and the Incentive Claim Milestone. For applications that have passed the Reservation Request Milestone, the majority, 318 projects, have reached Proof of Project Milestone or have had their Proof of Milestone approved.

Not only is reservation approval a significant achievement for an application, but it also signals an important handoff of information between the SOMAH PA and IOUs. Based on mandates in the CPUC's Decision, D.17-12-022, the SOMAH PA sends monthly reports to the IOUs for Energy Savings Assistance Program (ESA) referrals of projects with reservation approval for each month, as well as a rolling list of all projects with approved reservations. These reports highlight an important part of data exchange between the SOMAH PA and IOUs, which encourages program benefits with "warm" ESA leads and valuable pipeline information for future interconnections from reservation approvals. The outcome of the monthly reported ESA leads is collected annually in Q4, with returned data from the IOUs based on completed projects that have received SOMAH incentives. The first IOU data collection was completed in Q4 2021 with information on whether the SOMAH project leads materialized into an ESA Common Area Measures (CAM) or in-unit referrals. With the limited number of completed projects at the time of the request, the available data is limited but expected to increase significantly from last year with the 2022 Q4 data request. Information on this referral collection and data reporting will continue to be shared as additional projects are completed and data is collected for reporting and analysis. A summary of the 2022 data request will be included in the January 2023 SAPR.

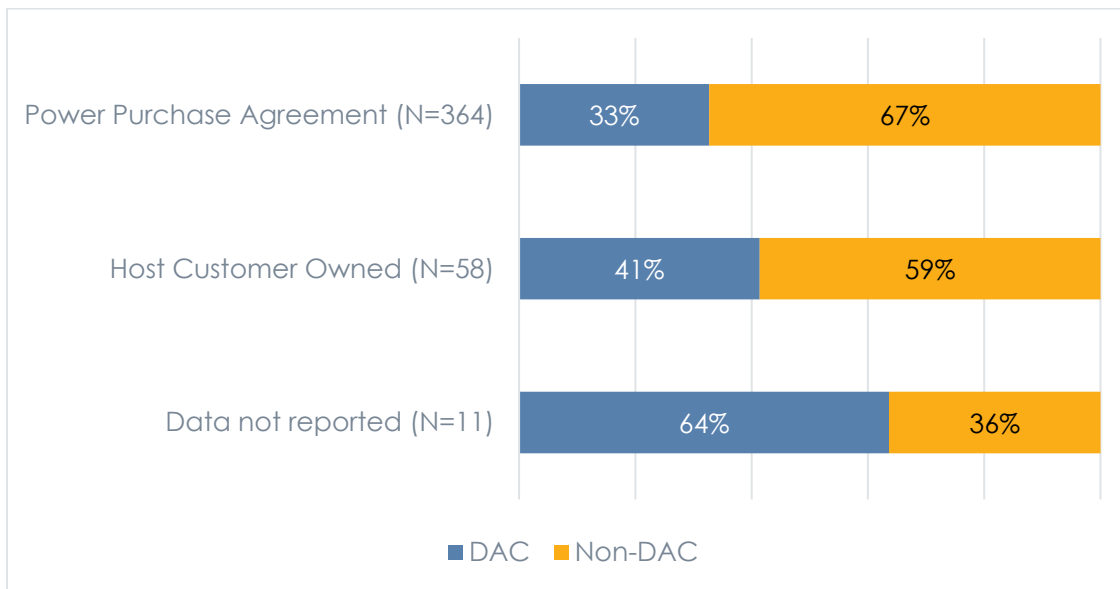
**Figure 15 – System Ownership Type**



N=433

As Figure 15 shows, the majority of SOMAH projects, 84%, are third-party owned (TPO) systems. The largest share of TPO systems are power purchase agreements (PPAs) similar to what some contractors term solar service agreements (SSAs). With the Handbook 5.0 updates, the SOMAH PA began differentiating contract types between SSAs and PPAs to capture the most accurate information based on the solar PV contract. Data will be reviewed for applications that have already passed the entry point in PowerClerk for this contract information and will be updated by the SOMAH PA in Q3 to be reflected as a separate ownership type in the next SAPR reporting period. Preliminary property owner and contractor feedback suggests the third-party ownership option is more financially feasible for property owners. Additionally, some contractor companies have preferred system financing/ownership options for their installations, which is a likely influence on the system ownership breakdown for the current application queue.

**Figure 16 – System Ownership Type by Property Eligibility**

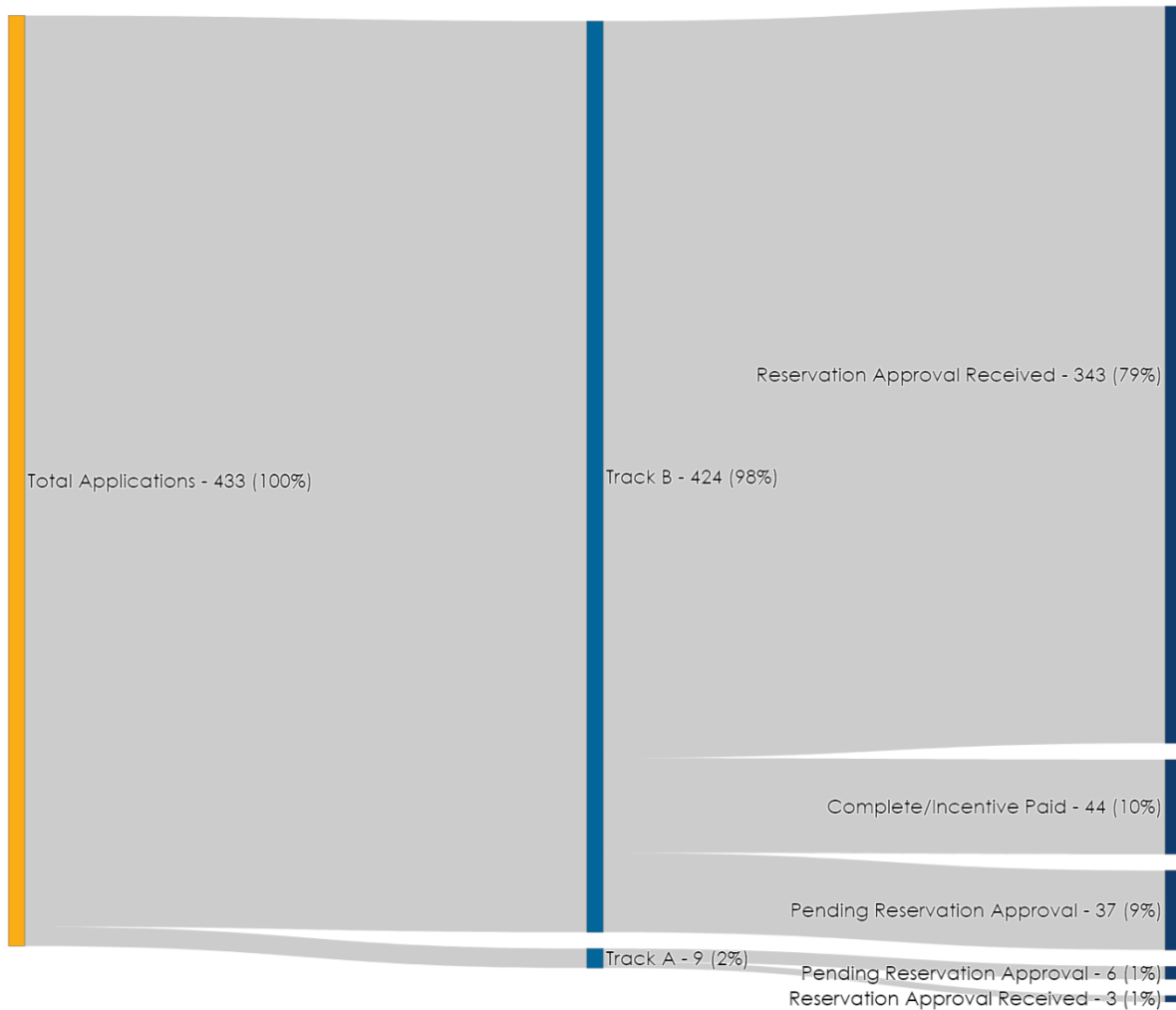


N=433

Figure 16 further segments system ownership types by DAC and non-DAC properties. The split of DAC and non-DAC projects is somewhat similar for host customer-owned systems and PPAs, ranging around 33-41% by ownership type.

Completing application milestones is an important part of progressing applications and collection of project data for the program. In the sixth reporting period for SOMAH, the program has applications in all stages of the application, construction and completion processes representing each of the program's four application milestones (plus the fifth optional milestone, Progress Payment Pathway). The Reservation Request and Energy Efficiency Compliance Milestones are important steps in determining project eligibility and the eligible system size, as they consider consumption history and available energy efficiency upgrades. Proof of Project Milestone and Incentive Claim Milestone provide information on the contracted and executed system as well as proof of compliance with the program's job training and tenant education requirements.

**Figure 17 – Application Reservation Status by Incentive Track<sup>10</sup>**



See Appendix A for a full list of application statuses and descriptions.

The goal for the Energy Efficiency Compliance Milestone (EECM) is to assess the project site for energy efficiency opportunities, focusing on reducing site consumption before producing solar energy at the property. There are two pathways to fulfill the EECM requirement: Pathway 1 – energy efficiency whole-building walk-through audit and Pathway 2 – recent or active participation in an approved whole-building energy

<sup>10</sup> Calculations used for this visual are subject to rounding and total percentage may not equal 100%.





upgrade program, documentation of a recent California Tax Credit Allocation Committee (TCAC) rehabilitation or documentation that the property was completely constructed under a recent version of Title 24.

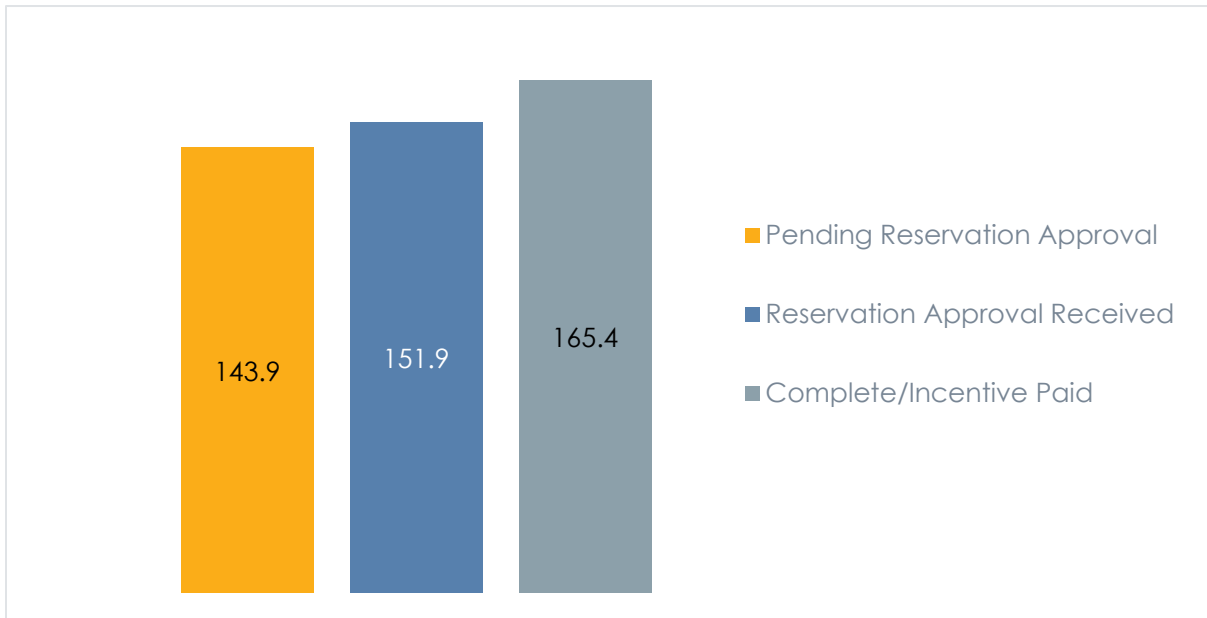
Pathway 1, whole-building walk-through audit, has posed some challenges during the COVID-19 health crisis for SOMAH participants. To accommodate these challenges with completing program requirements, the SOMAH PA introduced the EECM Postponement option in early July 2020 as a temporary program response, allowing projects that have received reservation approval to postpone submitting their EECM documentation up to submission of the Incentive Claim Milestone. At the Q2 2021 Public Forum, the SOMAH PA announced an end to the EECM Postponement option effective September 13, 2021, and continued to honor projects that are approved for EECM Postponement with no impacts to those project timelines. In total, 307 total projects enrolled in the EECM Postponement while it was available 2020-21. None of those active projects are currently in Energy Efficiency Compliance Milestone Postponement Approved status, as compared to the 44 projects from the last reporting period.

As more projects progress to PPM and beyond, the SOMAH PA anticipates receiving more information about subcontractors that some projects are utilizing. This subcontractor information helps to provide further insight into the diversity of contractors engaging in and benefiting from the SOMAH Program. Currently, two contractors are utilizing subcontractors on 46 different projects. In total, there are 13 separate subcontracting companies working in support of completing SOMAH projects. In this reporting period, eight contractors have progressed a portion of their application portfolios to the Proof of Project Milestone (PPM), Progress Payment Pathway, Incentive Claim Milestone and project completion. The first completed project, PGE-SOMAH-101, finalized its incentive claim and final payment in Q4 2020. Throughout 2021, 13 additional projects finalized their incentive claim and received their final incentive payments from SCE, PG&E and SDG&E territories. In the first half of 2022, 30 more projects have been completed and paid for a total of 44 completed projects at the close of June 2022.

As of the end of June, six projects are currently working through the Incentive Claim Milestone. Of those incentive claim projects, five are currently undergoing review by the SOMAH PA, and one is pending IOU approval. Further information on completed projects will be available in future reports as applications continue to progress through their 18-month reservations and receive their incentive payment. The SOMAH PA is encouraged by the project completion movement that has occurred in 2022 and

expects a continued high rate of project completion and incentive payment as the year continues and well into 2023.

**Figure 18 – Average System Size (kW) by Reservation Status**



N = 427

Validating each project's system size with aggregated annual electrical consumption history from IOU data requests is a key step of the reservation request, prior to approval. The historic electrical consumption directly influences the system's final sizing. Figures 18, 19 and 20 outline system size statistics for the average and largest projects across the IOU territories.

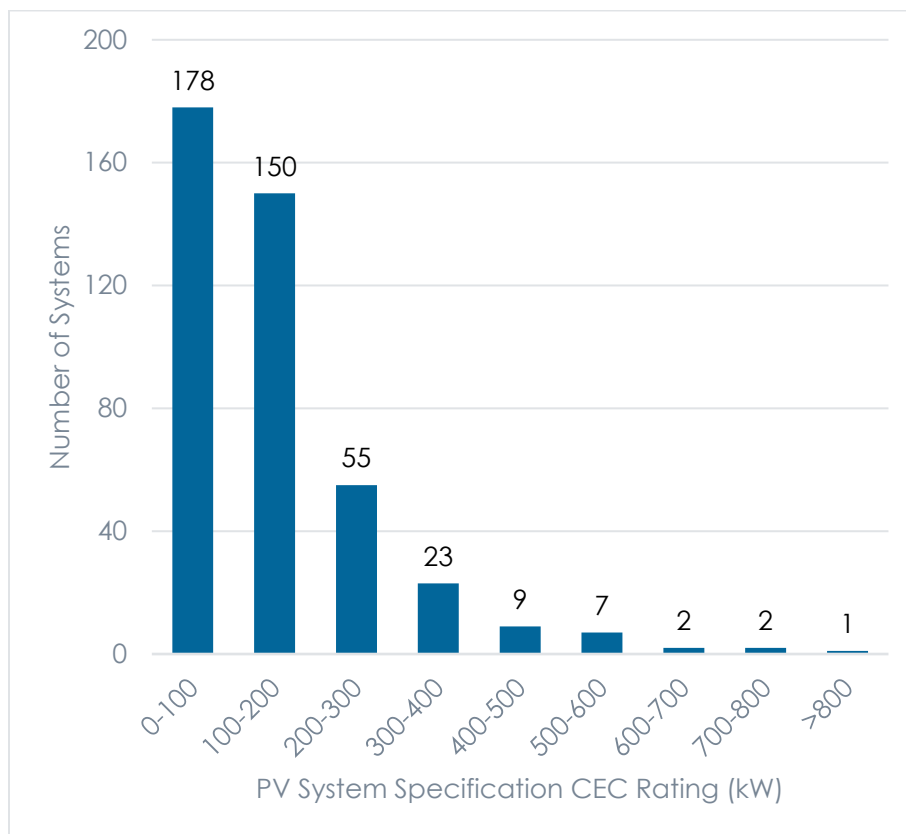


**Figure 19 – Average System Size (kW) by IOU Territory and Reservation Status**

Program	Pending Reservation Approval	Reservation Approval Received	Complete/ Incentive Paid	Waitlist	Canceled/ Withdrawn
PG&E	105.5	130.7	134.3	0.0	202.5
SCE	170.5	186.5	198.0	0.0	235.2
SDG&E	167.9	181.7	114.2	0.0	168.8
Liberty Utilities	0.0	74.2	0.0	0.0	0.0
PacifiCorp	0.0	111.6	0.0	0.0	0.0

N = 648

**Figure 20 – Distribution of System Sizes (kW)**



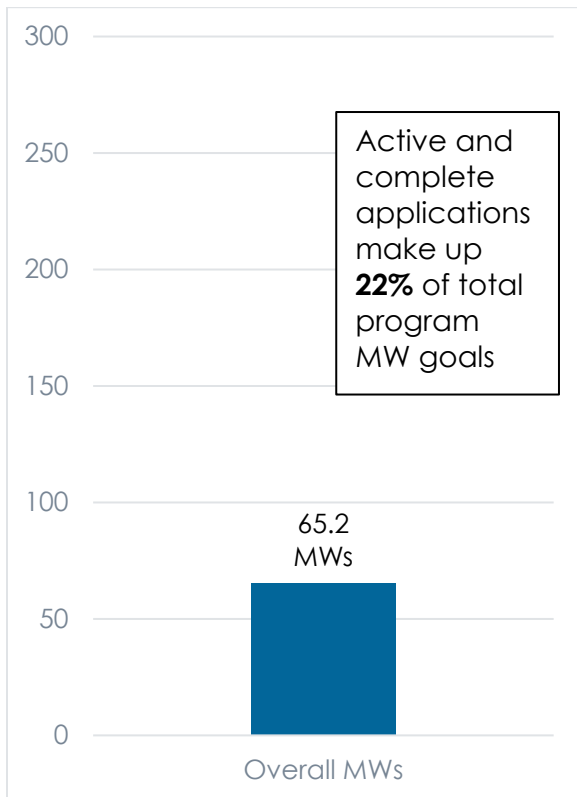
N = 427

From the approved reservations, data shows that projects reduce their system size by an average of 30.55% from initial submission. The trend to reduce the system size after IOU consumption data sharing (post-reservation submittal and pre-reservation



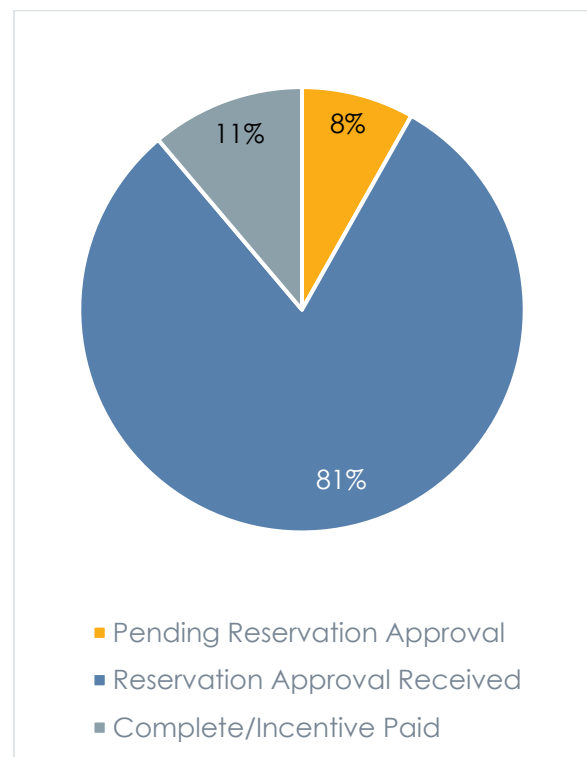
approval) continues. However, data shows that newer projects (submitted later in 2021 and early 2022) are trending with smaller adjustments overall. The SOMAH PA attributes this shift to contractors' evolving experience with the program and availability to assess the project sites and solar potential prior to submitting the incentive application. While using standard measurements assumptions like kW/square foot can be a helpful starting point, this trend shows that contractors are using all resources available and taking a real-world approach to system sizing as projects are developed and compared with site consumption history by the SOMAH PA.

**Figure 21 – Progress to 300 MW**



N = 427

**Figure 22 – Percent of Program MW by Reservation Type**



N = 427



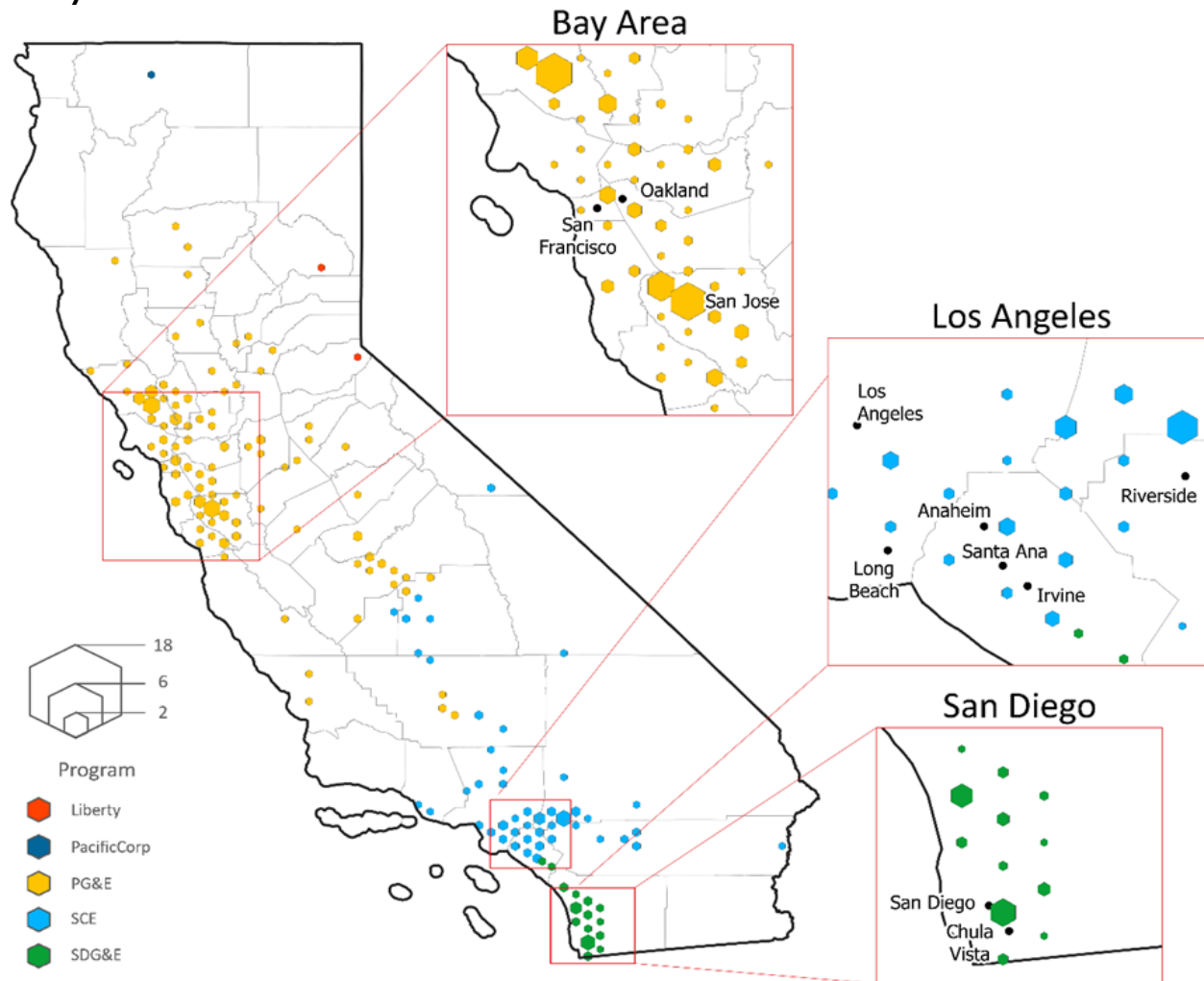
Additionally, the average system cost is \$3.89/watt CEC-AC<sup>11</sup> with a total expected aggregate annual output of 566,320,378 kWh<sup>12</sup> for the active SOMAH projects in queue. Completed projects increased from 3% of the application queue at the close of 2021 to 11% of the queue, with the newly completed and paid projects in Q1 and Q2 2022. The percentage of pending reservation approval projects decreased from 32% to 16%. This decrease is mostly due to a high number of applications moving past the initial application review and into reservation approved status.

Figure 23 shows the geographic distribution of property locations for applications received to date. For additional detail, a closer view is provided for areas of higher density project regions in the San Francisco Bay Area, San Diego and the greater Los Angeles area.

<sup>11</sup> Project costs are not considered verified until review of the installation contract and associated costs at the Proof of Project Milestone. The numbers used in this average are estimates reported for the projects currently in queue and are likely to fluctuate in future reporting periods.

<sup>12</sup> Expected aggregated annual output is an estimate based off the PV equipment and system configuration specifications currently listed for all active applications in PowerClerk. This figure is subject to change based on updated system designs for projects in queue. System components and configuration are not verified until the on-site inspection at the Incentive Claim Milestone, which directly impact the expected output of the PV system.

**Figure 23 – Project Density and Location Visualizations**





### 3.1.2 Program Payments

The Progress Payment Pathway was designed to alleviate cash flow issues reported by participating contractors and helps dismantle barriers to increase contractor diversity. The development process of progress payments included PA consultation with program participants and stakeholders to develop the two-payment pathway for progress payments with Advice Letter 118-E submission on September 18, 2020. Energy Division then approved Advice Letter 118-E on December 21, 2020, and the SOMAH PA focused on preparation in Q1 2021 to launch progress payments in April 2021. Based on stakeholder feedback from public comments to Handbook 5.0, Advice Letter 133-E, the SOMAH PA amended the eligibility window for the minimum time requirement between progress payment and incentive claim from the prior four-month requirement to two months based on process flows and timelines.

Depending on the application timeline and installation status, a project can participate with the standard, one-payment at the Incentive Claim Milestone or apply for a progress payment after completing the Proof of Project Milestone (PPM). A project is eligible for the Progress Payment Pathway after it has received a PPM approval and the system has been fully installed or mechanically complete. Mechanical completion is defined as the point at which all PV equipment has been installed, including the net generation output meter (NGOM) socket and the system wiring has been completed, but the authority having jurisdiction (AHJ) and local utility inspections have not yet taken place, and the system has not yet been granted permission to operate (PTO) from the utility. If a PV system has already been granted PTO, the project is not eligible for a progress payment. In addition, the incentive claim deadline can be no less than two months from the Progress Payments Pathway submission date. All projects requesting a progress payment are required to complete a live virtual walk-through (VWT) with the SOMAH PA to verify the system installation. The VWT consists of a video call, with the participant walking the SOMAH PA through the site to show the system components, including the installed PV modules, installed inverter and the project site address with the street number visible. After a completed VWT, the SOMAH PA grants approval for the progress payment, which is 60% of the calculated incentive amount. The remaining incentive amount is issued after an approved incentive claim and verified on-site inspection by the SOMAH PA. Alternatively, should a project be ineligible or not interested in the Progress Payment Pathway, the full incentive is issued as a single payment to the designated payee after an approved incentive claim and verified on-site inspection as a standard incentive payment. Upon launching progress payment offering, additional data fields were added to the working data set on [California DG](#)



[Stats](#) that indicate an approved opt-in to the Progress Payment Pathway and the resulting progress payment amount.

After launching the Progress Payment Pathway in April 2021, four progress payment requests (all SCE territory) were submitted by the end of Q2 2021. Eleven more progress payment requests were submitted in Q3 and Q4 for a total of 15 progress payment participants at the end of 2021. Application activity in 2022 continued with a substantial increase in project progression, the number of projects eligible for progress payment with PPM approval and completed and paid projects. With a few additional progress payment requests trickling in during Q1 2022, there was a rapid uptick in progress payment activity at the end of April with 15 new progress payment requests submitted in the span of one week and 10 more submitted in May. This spike in requests through April and May more than doubled the progress payment activity from the first eight months of 2021. With forecasts and deadlines upcoming for the remainder of 2022, the program expects ongoing progress payment activity for future reporting periods and is collecting feedback on the value and experience of progress payments through the Project Completion Survey that is deployed with final incentive payments. Figure 24 outlines payment details for the program with a summary of the number of progress payments and standard payments issued and the applicable associated dollar amounts.

**Figure 24 – Program Payment Statistics<sup>13</sup>**

Program	Progress Payments Issued	Progress Payments Total (\$)	Final Incentive Payments Issued	Final Incentive Payments Total (\$)
PG&E	14	\$2,100,017	12	\$2,972,291
SCE	15	\$4,049,296	24	\$6,849,129
SDG&E	10	\$1,509,818	8	\$1,875,282
Liberty Utilities	0	\$0	0	\$0
PacifiCorp	0	\$0	0	\$0
<b>Total</b>	<b>39</b>	<b>\$7,659,132</b>	<b>44</b>	<b>\$11,696,702</b>

<sup>13</sup> Progress Payments Total and Final Incentive Payments Total include some invoiced, pending payments.





In Q1 and Q2 2022, 28 new projects enrolled in the Progress Payment Pathway and received their progress payment. Not all the reported 39 progress payment projects have completed installations and received final incentive payment as shown in Figure 24, with completed projects totals. Three of the projects that enrolled in the Progress Payments Pathway have reached the Incentive Claim Milestone and have received their final incentive payment. The timeline for these projects shows that the progress payment offering allowed the participants to receive the benefit of a partial incentive payment nearly six months prior to their final incentive payment. This timeline supports the SOMAH PA's goal to alleviate financial barriers and support project viability. There have been no instances of projects dropping out between the disbursement of progress payments and the completion of the incentive claim process. Future Semiannual Progress Reports will continue to include an update of program payment activity as highlighted in Figure 24, as well as analysis of payment timelines and progression details as additional projects are completed and paid.

The electronic payment option for application deposits has become a very popular option for participants, which was a motivation for the SOMAH PA to streamline other payment and incentive claim processing. The electronic payment offering started with application deposits and was further extended to progress payments and final incentive claim payments as well. At the close of this reporting period, all but four incentive payments and five deposit fee refund payments issued were via electronic payment method. All progress payments have been made via electronic payment method.

### 3.1.3 Online Bidding Tool

The online bidding tool is a platform used to connect property owners with eligible SOMAH contractors, providing an apples-to-apples bid comparison. The platform is available for all SOMAH participants and supports the multiple bid requirement for Track A projects. The online bidding tool maintains a repository of eligible SOMAH contractors that have completed the Contractor Eligibility Training webinar and registered their primary contact information with the SOMAH PA. SOMAH contractors can use the online platform to gain access to job leads, respond to project bid requests and demonstrate program compliance.

The online bidding tool serves three distinct functions. First, it allows the host customer to indicate their interest in receiving a bid from three contractors of their choice. This encourages the customer to do basic research on a contractor ahead of time, such as researching reviews, and then gives them the opportunity to select their top three contractors. Then, after the customer's selection of bidders, the tool notifies the SOMAH-



eligible contractors, who then get in touch with the host customer to begin the process of building a site-specific proposal. Finally, once all three contractors have completed proposals, the tool aggregates basic information about the proposal into a single user interface, which allows the host customer to compare topline proposal information, including project cost, size, estimated date of completion and ownership type. The online bidding tool integrates with SOMAH's Project Bid Form, the eligible format to meet the multiple bid requirement. Whereas contractors have unique proposal generation tools and layouts with different underlying assumptions, SOMAH's requirement of a standardized bidding form harmonizes the detailed elements of a proposal into a consistent format containing objective and verifiable information. In this reporting period, the PA has worked to incorporate small but meaningful updates to the bidding tool intake form with help text, required fields and clarified field labeling in order to provide the best user experience and ease of use with the tool.

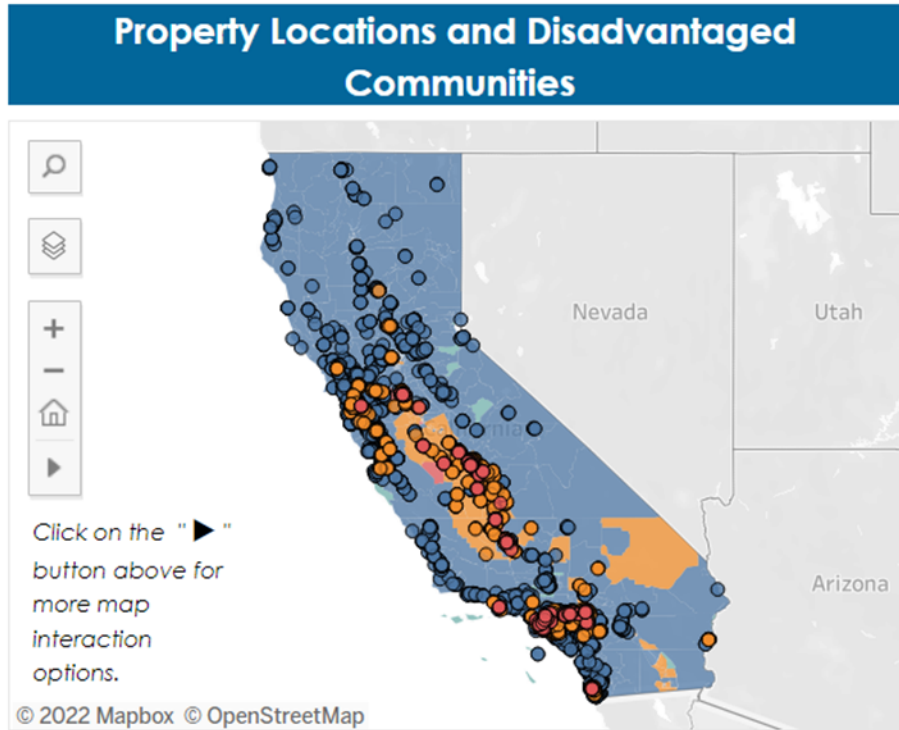
While there was no new activity with the bidding tool in the first half of 2022, the newer Track A projects submitted during this reporting period will likely be using the bidding tool later in 2022. The SOMAH PA looks forward to reporting tool usage metrics and customer experience information in subsequent Semiannual Progress Reports when more data is available in aggregate.

### 3.1.4 Eligible SOMAH Properties Map

Figure 25 provides an overview of the Eligible SOMAH Properties Map. A refreshed user interface was developed in Q2 2022 to include new features to make the map even more user friendly and streamline the access and navigation of key features and data points. The map webpage has received over 3,789 page views in Q1 and Q2 of 2022. This update will be released in Q3 with additional updates to the map data, including incorporating CalEnviroScreen 4.0 properties.

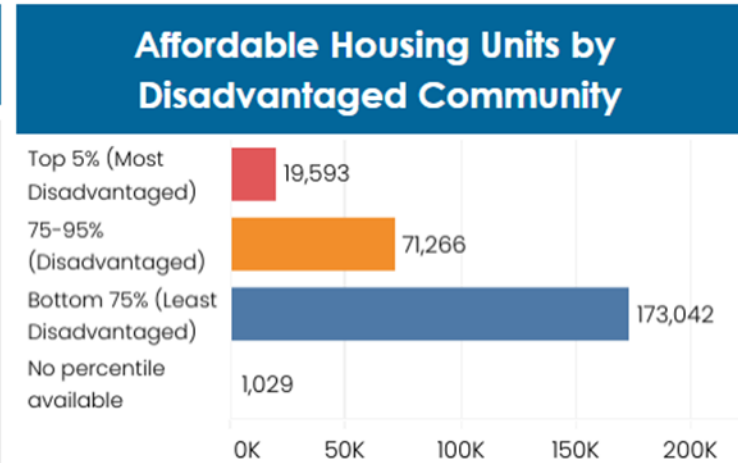
Map data is based on data from the California Housing Partnership's Preservation Clearinghouse. It is designed for use by SOMAH participants and stakeholders, especially solar contractors. The interactive visuals show multifamily affordable housing as well as current SOMAH applications, allowing users to filter by street address, ZIP code, main SOMAH eligibility requirements, legislative districts, utility territories and SOMAH applications. The map provides color coding based on a property's location in CalEnviroScreen defined disadvantaged communities, utility territories, legislative districts and climate zones.

**Figure 25 – Eligible SOMAH Properties Map**

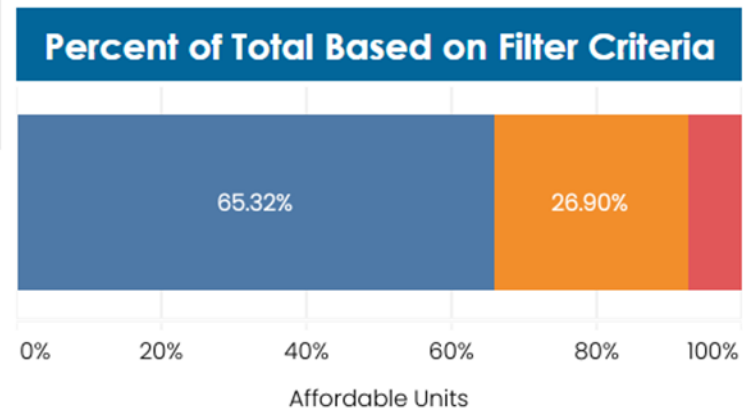


The [5] Property Locations by [1] Disadvantaged Community map displays the location of properties eligible for the SOMAH program. The color shows details about Disadvantaged Community (DAC) Census Tracts, which are defined based on CalEnviroScreen 3.0 criteria.

- Communities
- Top 5% (Most Disadvantaged)
  - 75-95% (Disadvantaged)
  - Bottom 75% (Least Disadvantaged)
  - No percentile available



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



This chart shows the percentage of affordable housing units by disadvantaged community status. The chart is sorted from largest percentage to smallest percentage.



### 3.1.5 California Distributed Generation Statistics

The SOMAH Working Data Set, which reports on all applications received for the program across the five utility territories, is updated weekly on the California Distributed Generation Statistics (DG stats) [website](#). The website (previously named California Solar Statistics) has been a valuable tool for customer-sited solar projects since its inception under the auspices of the California Solar Initiative. The working data set report includes data associated with all in process (active), completed (installed and paid), waitlisted (when applicable), withdrawn and/or canceled projects. Reported data includes, but is not limited to, application data, contractor information, incentive amounts and solar PV system cost and technical specifications. All personally identifiable information is scrubbed from the data set to ensure customer privacy. The data set includes [two resources](#), a “Data Key” and “Read Me” PDF for download. The Data Key is a short summary of the data fields displayed in the working data set, and the Read Me includes a summary table of fields added and/or removed from the working data set, as well as the effective date, for further transparency and ease of use to stakeholders accessing the data set.

The working data set continues to be a frequented resource for program stakeholders and participants to glean insights on program progress and trends. Program data from the working data set also populates data visualizations on the [SOMAH Statistics and Chart](#) page of California Distributed Generation Statistics. Eleven charts and graphs are currently displayed on the page, four of which were recently released in the last reporting period to display capacity installed, size of installed systems, average project and incentive costs, installed capacity and type of work performed by trainees. The charts and graphs on DG stats were separated into phases due to the slower timeline of project completion and smaller availability of data until mid-2021. With the increased activity for project completion, these charts and graphs will continue to populate over time with valuable data highlighting the noteworthy impacts of completed SOMAH projects. In June, additional filtering features were deployed to the SOMAH charts and graphs page for dynamic viewing of key visuals across the participating territories and applicable data types. Section 4, Program Planning and Development further elaborates on additional public reporting and transparency measures of the SOMAH Program.

## 3.2 Marketing, Education and Outreach

As the SOMAH Program closes out its third program year, the PA's audience engagement has emphasized storytelling through success stories, blogs and social media posts. Activities have included planning ribbon-cuttings, resuming in-person



events and redesigning the SOMAH website and overall program messaging. The program celebrated many successes during this reporting period, as outlined by each audience type. ME&O efforts were guided by the PA's 2022 ME&O Plan and focused on: 1) property owner outreach and growing the property owner pipeline, including the newly DAC-designated federal tribal land properties; 2) efforts to increase contractor and subcontractor diversity; 3) increasing in-person tenant education workshops; 4) showcasing job trainee solar career success stories; and 5) increasing stakeholder outreach with the assistance of SOMAH-contracted CBOs while continuously building co-marketing partnerships.

### 3.2.1 2022 ME&O Plan

SOMAH's annual Marketing, Education and Outreach Plan (ME&O Plan) guides the program's marketing, education and outreach activities, setting goals, objectives and tactics to reach SOMAH's priority audiences and supporting the overall program goals for 2022. The 2022 ME&O Plan was finalized in February after a public comment process. The 2022 ME&O Plan used Phase II evaluation recommendations to help address outreach gaps per audience. SOMAH's 2022 ME&O Plan is centered on the same five goals as listed in the 2021 plan.

#### **SOMAH's ME&O Goals**

**Goal 1:** Engage property owners to build and maintain a multiyear pipeline of diverse projects.

**Goal 2:** Continue building a robust and diverse contractor base and support eligible contractor retention.

**Goal 3:** Ensure sufficient job trainee participation and preparation for SOMAH job training opportunities or relevant careers.

**Goal 4:** Educate SOMAH-eligible tenants and tenants living in participating SOMAH properties about the program and how to maximize their benefits.

**Goal 5:** Ensure stakeholders are informed of and helping to co-market the program.

### 3.2.2 Monitoring, Evaluation and Research

Central to the SOMAH ME&O strategy is monitoring and evaluating the SOMAH PA's efforts. The PA uses several methods of monitoring and evaluating ME&O efforts, including surveys, qualitative interviews and program data analysis as well as reporting and transparency activities. The efforts are determined by the PA based on the



program implementation plan, handbook, annual ME&O plans and other ongoing needs as determined.

Surveys are issued to all SOMAH audiences at different stages in the process, from ME&O efforts, through the application, to post-application. In Q1-Q2 2022, the SOMAH PA launched a survey for property owner program participants. This survey is intended to:

- Understand property owners' motivations for program participation.
- Gauge property owners' overall satisfaction with SOMAH.
- Determine property owners' willingness to participate in the program again and recommend it to others.

Feedback from surveys of SOMAH key audiences will be used to inform ongoing ME&O outreach efforts and the application process. The PA anticipates reporting on these surveys by the end of 2022, pending adequate project completion and survey response rates (i.e., the ability to report on surveys depends on when the PA receives statistically significant data for each survey). See Figure 26 for a summary of planned and completed surveys. Some surveys previously reported on have been removed.

In addition to monitoring and evaluation efforts, the SOMAH PA began conducting future-focused research. This research is designed to: 1) identify opportunities to increase diverse contractor participation in SOMAH as prime or subcontractors; 2) spot opportunities to increase overall property owner participation in SOMAH; and 3) evaluate program retention. These research projects are outlined.

## **Surveys**

In the first half of 2022, the PA met an important survey milestone with the creation and launch of the Project Completion Survey: Property Owner (non-applicant). This survey is intended to:

- Understand property owners' motivations for participating in the program.
- Gauge property owners' overall satisfaction with SOMAH.
- Determine property owners' willingness to participate in the program again and recommend it to others.

This survey will provide valuable insight into property owners' perspective and experience in the SOMAH Program. Statistically significant numbers for this survey are expected by the end of 2022.



**Figure 26 – Number of Completed and Planned Surveys by Category**

Audience	Survey Name	Milestone/ Timeline	Launch Date	Frequency
Contractors	Job Trainee Performance Survey	Post-project installation	Launched Q3-Q4 2021	Ongoing post-installation
Contractors	Job Trainee Employed Survey	Post-project installation	Launched Q3-Q4 2021	Ongoing: 3, 6 and 9 months after reported trainee hiring
Applicants	Project Completion Survey: Applicant	Deployed with final incentive payments.	Launched Q3 2021	Ongoing post-incentive claim
Property Owners	Project Completion Survey: Property Owner (non-applicant)	After incentive claim approval	Launched Q2 2022	Ongoing post-incentive claim
Property Owners	Property Owner Survey - No Application - In listserv	In SOMAH email listserv, no application	Launched Q3 2020	Annually*
Property owners	Property Owner Survey - No Application - Not in listserv	Before joining SOMAH email listserv	Launched Q3 2020	Ongoing
Property Owners	Technical Assistance (TA)	Post-TA, pre-Reservation Request	Launched Q4 2021	Ongoing post-TA
Tenants	Tenant Education	Post-project installation	Launched Q1 2022	Ongoing post-install
Job Trainees	Job Trainee Experience Survey	Post-project installation	Q1-Q2 2022	Ongoing post-install

\* Paused in 2021 due to redundancy with third-party evaluator survey.

### Program Research

SOMAH's research projects are outlined in Figure 27. During Q3 2021, the PA created a research plan to better understand the program's participants, audiences and successful projects. This plan encompasses a mixed methods approach that includes research to evaluate: 1) where and how property owners learn about SOMAH; 2) what motivates them to participate; and 3) what causes them to withdraw their applications. The research will continue into 2022 and will be reported in future Semiannual Progress Reports.



**Figure 27 – SOMAH 2021-22 Program Research**

<b>Project Descriptions</b>	<b>Research Objectives</b>	<b>Audience</b>	<b>Timeline</b>
Contractor Focus Groups	<ul style="list-style-type: none"> <li>• Understand barriers to contractor participation in SOMAH, especially small, minority-owned and women-owned businesses</li> <li>• Identify solutions to encourage more contractor participation in SOMAH</li> </ul>	Non-Participating Solar Contractors	Delivered Q1, 2022
Property Owner Pipeline Analysis	<ul style="list-style-type: none"> <li>• Understand notable gaps in pipeline development and applicant retention</li> <li>• Identify what ME&amp;O activities are likely to result in lead generation</li> </ul>	Participating Property Owners  SOMAH PA	Q3, 2022
Property Owner Focus Groups	<ul style="list-style-type: none"> <li>• Gauge property owner interest in installing solar on their properties</li> <li>• Understand solar installation priorities for property owners (including general operations as well as capital projects)</li> <li>• Identify structural barriers to participation</li> <li>• Identify ways SOMAH can use its resources to support target audience participation</li> </ul>	Non-Participating Property Owners	Q2-Q3, 2022
Sub-Contractor Interviews	<ul style="list-style-type: none"> <li>• Understand subcontractors' experiences in the SOMAH Program and what structures facilitated their participation</li> <li>• Determine what aspects of their experience are replicable for like-sized contractors</li> </ul>	Participating Subcontractors	Q3-4, 2022
Tenant Education Focus Groups	<ul style="list-style-type: none"> <li>• To evaluate the effectiveness of SOMAH's tenant education materials</li> <li>• To create engaging and effective materials for residents receiving solar through the SOMAH Program</li> </ul>	Participating SOMAH tenants	Q2 2022





## **Contractor Focus Groups**

To better understand barriers to participating in SOMAH, the SOMAH PA organized focus groups with contractors and property owners who were registered in PowerClerk and subscribed to the program listserv, respectively, and had not yet participated in the program. These focus groups were developed with the Transparency and Insights (T&I) team at the Center for Sustainable Energy. To provide anonymity to participants, the T&I team led these focus groups, handled all analysis and provided a summary report with recommendations to the SOMAH PA.

## **Property Owner Focus Groups and Interviews**

The PA expanded its property owner focus groups due to feedback from SOMAH's third-party evaluator. The focus groups began in November 2021. Due to property owner availability, the focus groups were extended through December 2021.

The purpose of this research was to identify ways that SOMAH could increase participation from affordable housing property owners/managers in California by:

- Gauging interest in installing solar on their properties.
- Understanding where solar installation falls within their list of priorities for properties (including general operations as well as capital projects).
- Identifying structural barriers that may exist to participating in the SOMAH Program.
- Identifying ways SOMAH can use its resources to support property owner/manager participation in the program.

The SOMAH Program identified and contacted 106 for-profit and 120 nonprofit property owners for focus group participation that were small- to medium-size businesses. Among the identified owners, 12 property managers, who represented their respective property owner, agreed to attend a focus group. One focus group was held virtually on November 16, 2021, with two attendees. A second focus group was scheduled for November 17, 2021; however, it consisted of a 1-on-1 interview after one other registered participant did not attend. Of those who originally agreed to participate and could not commit to a focus group date, five of eight were successfully rescheduled for individual interviews. In total, the T&I team spoke with eight nonprofit property managers for this study.

Property managers who participated in this study mentioned that their primary reason for installing solar or considering installing solar on their properties was to reduce electrical cost for both the property owner and tenants. In prioritizing solar installation relative to other property projects, a few property managers said installing solar is one



of their top projects while others said building maintenance, emergencies, replacements or other projects take precedence. They also identified multiple types of barriers to their participation and continued participation in SOMAH. The key barriers identified were:

- Properties currently do not meet the SOMAH eligibility requirements.
- Lack of upfront funding for solar projects.
- Understaffed at their organization.
- Property limitations.
- Grid connectivity with the utility company.
- COVID-19 impact on solar investment due to material delays.
- Limited space to build on properties.
- Lack of clean energy champion.

Based on the focus group and interview findings, the following topics for consideration were crafted to help support property owner/manager engagement with the SOMAH Program. They are:

- Expanded eligibility.
- Clarification of costs.
- Extended deadlines.
- Packaging of program offerings.
- Facilitation of program support.
- Simplifying the process for getting solar interconnected.
- Packaging solar, battery storage and other sustainability incentive programs together.

Further details on the methods, findings and considerations have been provided to the SOMAH PA in a draft report.

### 3.2.3 Contractors

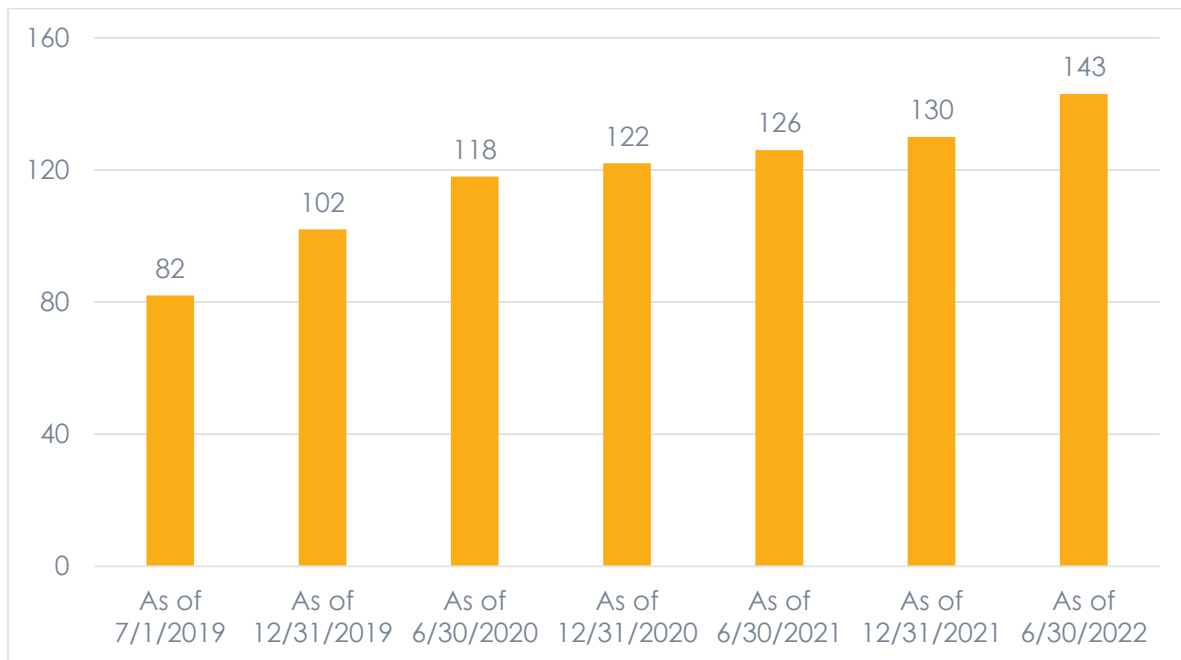
The SOMAH PA has engaged with active contractors through the Track B application pathway. Due to restrictions from COVID-19, the SOMAH PA continued to focus outreach efforts to contractors through digital channels and virtual events. To better understand current barriers to entry for smaller contractors, subcontractor interviews were launched in Q2 2022 (see Section 3.2.2, Monitoring, Evaluation and Research).

The PA continues to engage contractors through ongoing bimonthly Applicant and Contractor Eligibility Trainings. These eligibility training sessions were held in January, March and May 2022. The applicant and contractor trainings had a total of 32 attendees out of 74 registrants. Attendees included new contractor companies, new



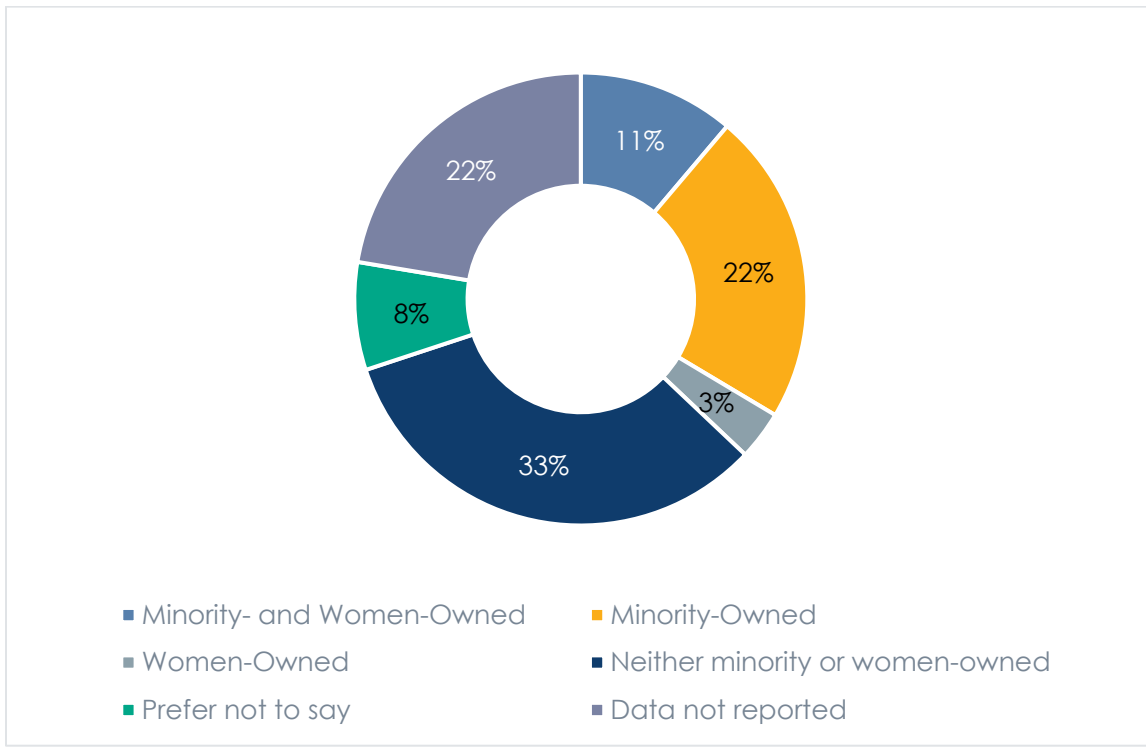
staff members and energy efficiency agencies. There was a collective marketing effort in promoting the eligibility training starting with several social media posts in Facebook, LinkedIn and Twitter, as well as sharing the training with different agencies, including SoCalREN (see Section 3.2.6, Stakeholders). There was also direct outreach to contractor companies via email and phone. During this period, there were a total of 143 SOMAH-eligible contractors, as shown in Figure 28.

**Figure 28 – Number of Eligible Contractors Over Time**



All of the eight new SOMAH-eligible subcontractors identified as minority-owned, four of them identified as women-owned. This reporting period, there was a diverse geographic participation, as we saw attendees from Chula Vista, located in southern San Diego County, to San Bruno, located on the San Francisco Peninsula. A total of four IOUs were represented in the previous Applicant and Contractor Eligibility Trainings. With SDG&E, SCE, PG&E and Liberty Utilities having representatives.

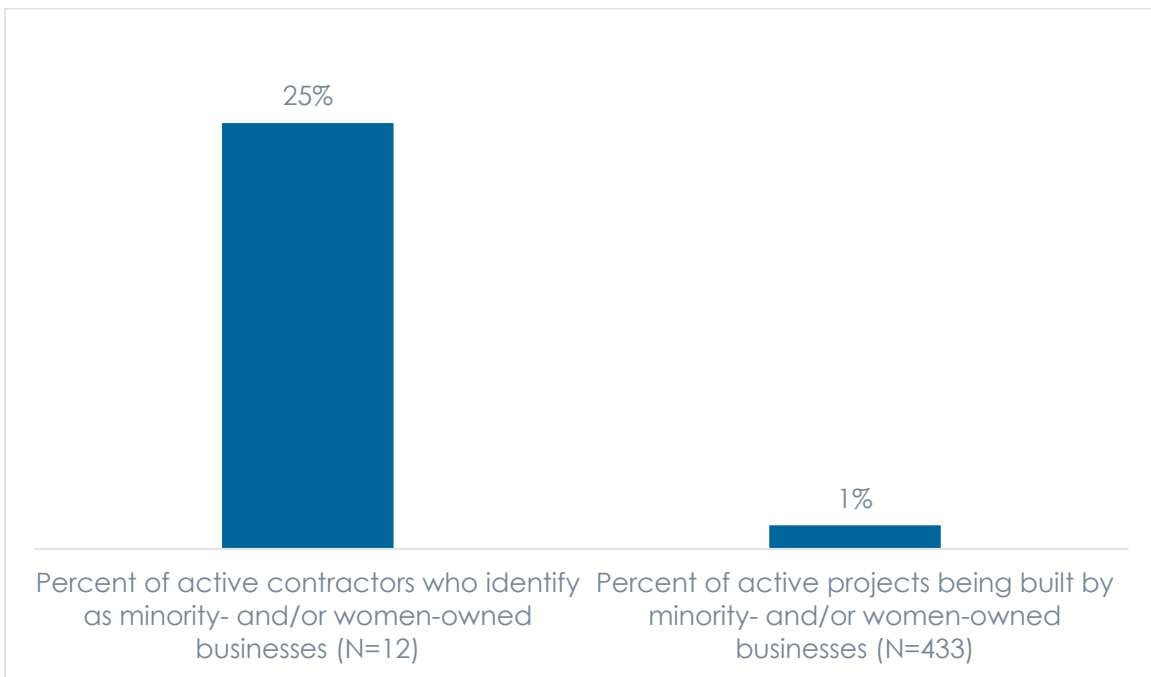
**Figure 29 – Eligible Contractor Statistics**



N = 143

As mentioned, all of the new contractors participating in the program are identified as minority-owned, which paired with an overall increase in diverse contractor participation in the program. Our efforts are moving in the right direction encouraging participation of contractors who reside in the Central Valley, as well as in the Liberty Utilities and PacifiCorp areas. During this period, SOMAH solicited co-marketing ventures with 10 media outlets to connect with potential contractor associations. SOMAH is actively working on meeting with two of these groups.

**Figure 30 – Active Contractor Diversity**



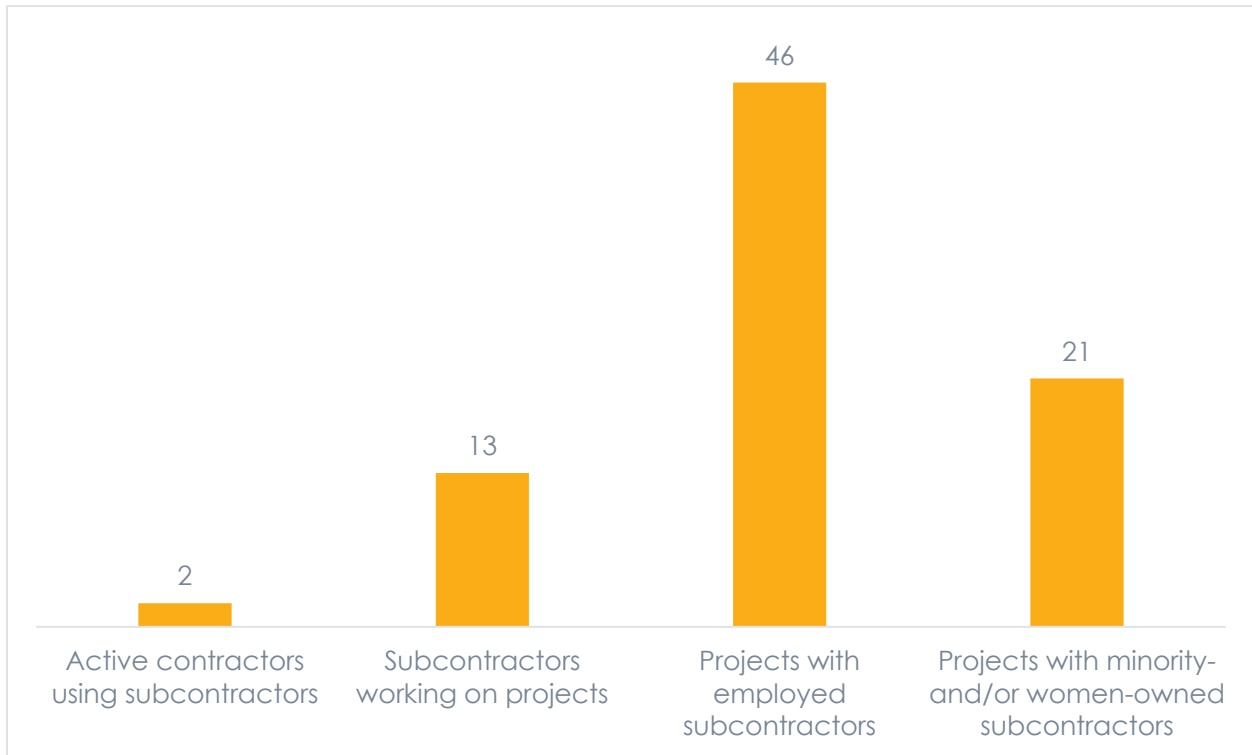
In addition to the current subcontractors, eight new subcontractors have begun working on SOMAH projects. A breakdown of the complete list of subcontractors is shown in Figure 31. From eight subcontractors, four identified as minority-owned. The PA will use this data to better understand the diversity of all participating contractors in the program. In 2022, the SOMAH Program saw a high demand for subcontractors for installations and began a successful pilot project in response to this demand, as well as third-party evaluation recommendations, to increase subcontractor participation. Efforts in connecting primary contractors with active applications to non-participating SOMAH-eligible contractors (no submitted applications) created opportunities for prime-subcontractor partnerships. The SOMAH PA is underway with interviews for active primary applicant contractors and current subcontractors to learn more about the tools the subcontractors need to become primary applicants leading projects.

SOMAH only requires that one contractor representative attend the training to obtain eligible SOMAH contractor status. Attendance at additional webinars is not a program requirement for eligibility but is offered if additional representatives or other stakeholders are interested in learning more about the program. The webinars are informative and delve into specific topics assisting contractors during the application process or help



provide updates and changes in the case of the quarterly public forums and the Incentive Step-down Analysis.

**Figure 31 – Subcontractor Statistics**



### 3.2.4 Property Owners

COVID-19 impacts persisted into this reporting period and led to a focus on digital engagement with property owners. However, in-person property owner conferences started up again, which the PA was able to attend. Primary channels of engagement have been direct email outreach, email announcements through the CalSOMAH listserv, webinars, conferences, social media, a paid media campaign and video content.

#### Direct outreach

During this reporting period, direct emails were sent to 40 for-profit property management companies (PMCs) and 82 nonprofit PMCs, including 33 housing authorities and three tribal entities. These companies represent a large portion of the total amount of eligible properties, as a single PMC can have numerous properties in their portfolio. Direct outreach emails were sent to promote the Upfront Technical Assistance and Support Services webinar that the SOMAH PA hosted in March and to

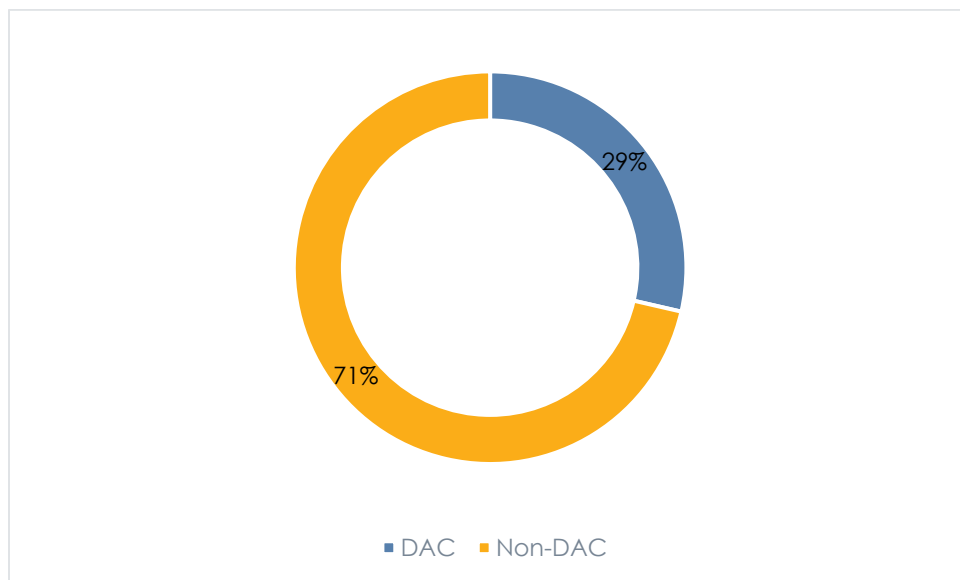


invite property owners to participate in the property owner focus groups earlier on in the year. An additional outreach effort that was completed during this reporting period was building out the property owner contact base. The PA utilized software called RocketReach to obtain current contact information for PMCs, whereas this information may have been outdated or even nonexistent in some cases. In total, over 150 contacts from these identified PMCs were gathered and added to our internal databases. Building out our contact database allows for outreach to be more impactful by casting a wider net.

### DAC and Tribal Outreach

One of the SOMAH PA's goals is to increase participation among properties located in DACs. During this reporting period, property owner outreach in DACs accounted for 336 properties contacted out of the 1,175 total, as shown in Figure 32. Direct outreach efforts via Salesforce emails were able to specifically target PMCs with properties in DACs. Additionally, the SOMAH PA completed 14 interest calls with SOMAH-eligible property owners, providing a portfolio review, a brief overview of the SOMAH Program and a Q&A session to wrap up. Connecting with property owners will continue to be a focus in 2022, with an emphasis on DAC owners.

**Figure 32 – Properties Contacted by DAC Status**



N = 1,175

The SOMAH PA also engaged with tribal entities through the participation of the Northern Circle Indian Housing Authority in the property owner focus groups in November. Additionally, relationships were established with the California Public Utilities



Commission (CPUC) Tribal Liaison team as well as the California Department of Housing and Community Development (HCD) Tribal Liaison team who provided support through feedback and strategies to better engage with tribal entities for future outreach efforts. The PA will continue ME&O efforts to increase tribal participation in SOMAH. The updated CalEnviroScreen now designates lands under federally recognized tribes as disadvantaged communities (DACs). This increases opportunities for tribal program participation in SOMAH, due to the eligibility of DAC properties. In relation to this program update, the SOMAH PA will be releasing a press release and circulating it to relevant associations and tribal entities. Additional tribal efforts will be through regional listening sessions and consultation, forming a tribal CBO partner, co-marketing with tribal housing entities and targeting outreach to tribal-serving JTOs. Also, the PA will be participating in a ribbon-cutting event with the Bishop Paiute Tribe Community Development and plans to gather case study content from this project, which can build credibility and encourage program participation among other tribal properties.

### Digital Marketing and Events

In Q4 2022, the SOMAH PA will launch a property owner nurture email campaign, which will engage owners who are already interested in SOMAH and subscribed to our email list but may not have any active projects yet. This email campaign will provide property owners with relevant information based on where they are in their SOMAH journey and provide additional content based on how they interact with the previous email. Some content pieces that have been developed and are already available on the CalSomah.org website include an [upfront technical assistance e-book](#), an [overview video](#) on the SOMAH Program specifically for property owners and project case studies.

There were three webinars hosted by the SOMAH PA for property owners during this period. The first was focused on promotion of technical assistance and support services and highlighted project case studies. The next two webinars were the Solar 101 Institute, which focused on training affordable housing providers on the basics of PV, including topics such as the benefits of solar PV installation, VNEM, project timelines, financing and information on other solar financing programs, such as the Low-Income Weatherization Program (LIWP), Comprehensive Affordable Multifamily Retrofits (CAMR) and BQuest. Looking ahead into the remainder of the year, the PA will be presenting in co-marketing webinars with 3C-REN and Marin Clean Energy (MCE). Both co-marketing webinars are property owner-facing and will focus on regional energy programs as well as SOMAH.

### Property Owner Outreach Events

- Upfront Technical Assistance and Support Services Webinar (March 22, 2022 – 4 attendees, 18 registrants)





- Housing California Conference (April 4-6, 2022 – 60 booth visits)
- Solar 101 Institute Webinar (Part 1 – May 10, 2022 – 61 attendees, 131 registrants and Part 2 – May 17, 2022, 36 attendees, 131 registrants)
- California Council for Affordable Housing conference (June 21, 2022 – 151 attendees)

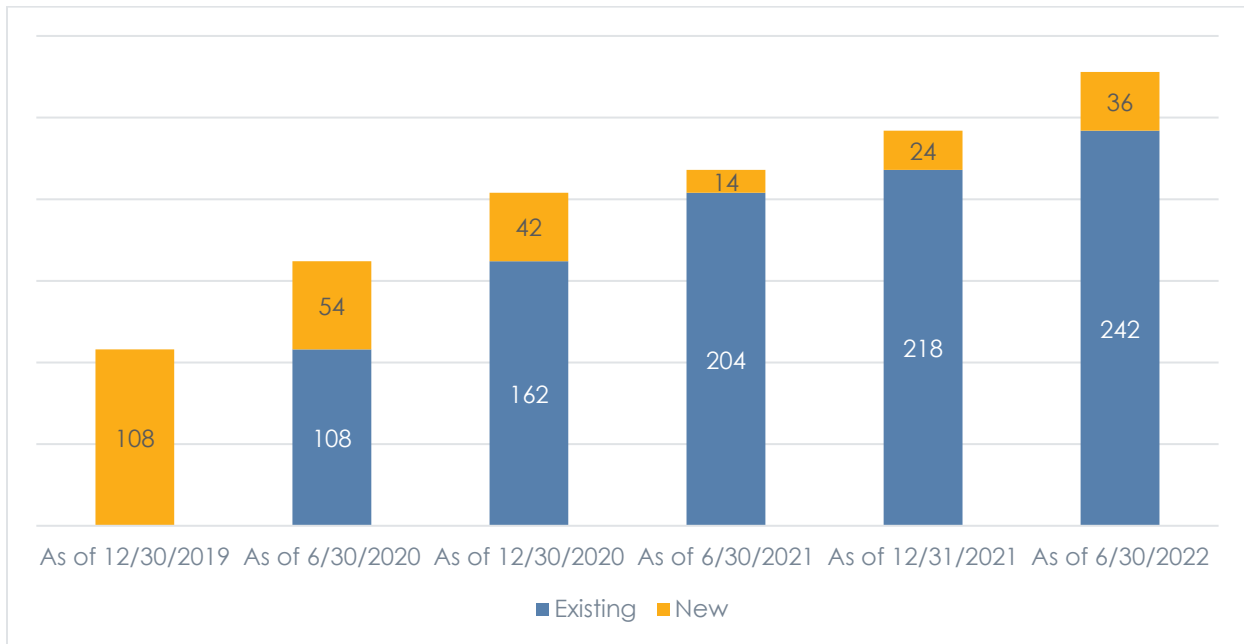
The SOMAH website and social media channels served as additional channels for digital marketing and engagement with the property owner audience. The main property owner's webpage on the SOMAH website performed well during this period with a total of 2,173 pageviews, with 1,809 of those being unique pageviews. In the second half of the year, the new program website will be launched, which should greatly improve user experience and provide SOMAH Program information in a clear manner.

The SOMAH PA deployed a paid digital marketing campaign via Google ads, Facebook and LinkedIn channels. These campaigns utilized geotargeting and were specifically focused on areas where PMCs had a high amount of DAC properties to increase awareness among those owners and encourage program participation. From February to June, the campaign generated 111,000 impressions and 1,061 clicks on Google Ads, 846,946 impressions and 6,110 clicks on Facebook and 255,750 impressions and 1,169 clicks on LinkedIn. Additionally, in May the paid property owner campaign integrated an interest form sign-up sheet and landing page. When an interested owner submitted their contact information, we are able to reach out to schedule an interest call and discuss a program overview, benefits and property eligibility details. During this reporting period, there were a total of 30 interest forms submitted, with 23 from nonprofit property owners and seven from for-profit developers. The team will be continuing these engagement efforts and setting up interest calls, which allows for a deeper look into property eligibility.

The email listserv increased to 36 new property owners during this time. About half of those new subscribers were attained while the paid marketing campaign was deployed, which indicates that it was a successful method in generating leads. The listserv provides important program updates, including funding announcements and program changes and alerts about upcoming events and webinars. Additionally, the listserv subscribers will be recipients of the nurture campaign content launching later in the year.



**Figure 33 – Property Owner Subscribers Over Time**



Finally, SOMAH’s community-based organization (CBO) partners continue to support property owner outreach through direct outreach efforts. CBO partners conduct direct outreach including virtual emails, phone calls and in-person site visits to properties located in communities with whom they have working relationships. CBO partnerships have proven to be extremely important to ensure that SOMAH outreach messaging and materials are appropriate and well-informed to reach multifamily affordable housing providers and their residents across the state. Additionally, the CBO partners have provided invaluable marketing support for the promotion of SOMAH events and program updates. See Section 3.2.5 for more information about SOMAH’s CBO partnerships.

### 3.2.5 Tenants

The primary objective of tenant education is to ensure tenants living in potentially eligible SOMAH buildings and those living in buildings participating in SOMAH are aware of and able to benefit from SOMAH in an equitable manner.

#### Community-based Organization Partnerships

The SOMAH PA continues to work closely with the program’s now eight CBO partners to conduct tenant, community, property owner and local government outreach to build awareness and participation in the program. Since the last reporting period, the



SOMAH PA has added two new CBO partnerships: Orange County Goes Solar and Community Environmental Council, whose focus will be on conducting outreach in Orange County and the Central Coast region, respectively.

During this reporting period, CBOs organized and/or attended 19 outreach events or workshops, engaging over 470 community members while ensuring that COVID-19 safety protocols were followed. Additionally, CBOs referred six community members to local job training organizations and contacted 113 property owners. Finally, in this reporting period, four of our CBOs began finalizing scopes for new contracts.

## **Tenant Education**

### Updated Strategies

The SOMAH PA is continuing to promote its Tenant Education Services for applicants, through continued quarterly Tenant Education Training Webinars for SOMAH applicants, contractor trainings and public forums. The team has also started conducting “wellness calls” to SOMAH applicants, starting with Track B projects that are contractor-led. The PA wants to gauge applicants’ preparedness for meeting their tenant education requirements and to encourage them to take advantage of SOMAH’s Tenant Education Services. So far, the SOMAH PA has conducted one wellness call, with a contractor who has several projects in the pipeline that have reached Proof of Project Milestone.

In June 2022, the SOMAH PA also completed its first “continued tenant education” services request – a request to provide tenant education for residents at a project that has a completed SOMAH installation and did not receive robust tenant education. The SOMAH PA and CBO partners led two continuing tenant education workshops with an attendance rate of 38 out of 179 residents at a property in Huntington Beach. A pre-workshop survey showed that many participants were unfamiliar with SOMAH and had many questions about the program, including whether SOMAH was now their energy provider, how bill credits were distributed, whether buildings without solar panels still receive credits, when time-of-use peak hours were and whether discount rates like CARE or FERA would be impacted with SOMAH. A post-workshop survey showed that all 38 participants felt very familiar with solar and the SOMAH Program after the workshop.

### Tenant Education Surveys

The SOMAH PA is also continuing to implement and analyze tenant education surveys and evaluations. In February, the SOMAH PA launched its tenant education surveys pilot with a property in Templeton, CA. The goals of these evaluations are to: 1) assess



existing tenant education materials; 2) evaluate how tenant education requirements are being met and challenges and barriers faced; and 3) ensure that survey participation is significant.

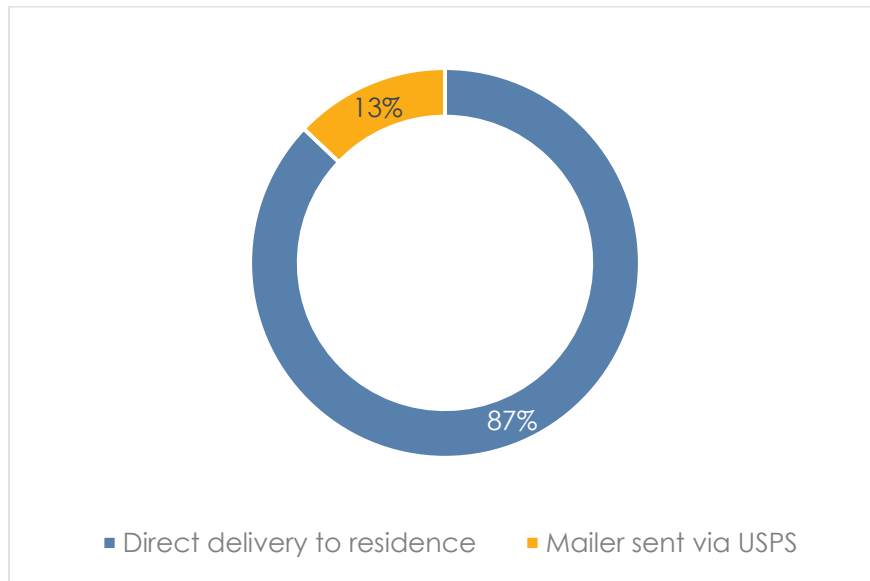
Surveys with \$5 incentives were mailed to 30 households, with an additional incentive of \$20 promised once a completed survey was returned to the SOMAH PA. Additionally, on-site property managers were contacted by the SOMAH PA to ensure they knew surveys were legitimate and to encourage tenants to participate. Of the 30 surveys deployed, 10 surveys were returned. A snapshot of the survey results is follows.

- Seven out of 10 residents received and reviewed at least one of SOMAH's tenant education materials.
- Residents note receiving and reviewing the following SOMAH materials the most, which are the program's required materials within a larger set of materials including optional collateral:
  - *"What to expect with SOMAH"*
  - *"How will your utility bill change?"*
  - *"Simple ways to save energy"*
- Nine out of 10 residents noted that they would like to learn more about topics related to solar and SOMAH, particularly about their utility bill savings and ways to save energy in their home.
- With regard to utility bill changes: 44.4% of respondents noted their bill decreased significantly, 11.1% noted that their bill decreased moderately and 33.3% noted no change. It is important to note that no tenants reported an increase in their energy bill.

The SOMAH PA is continuing to analyze the results from the surveys and will be deploying these surveys on a larger scale in Q3 and Q4 2022, exploring a virtual option for taking surveys.

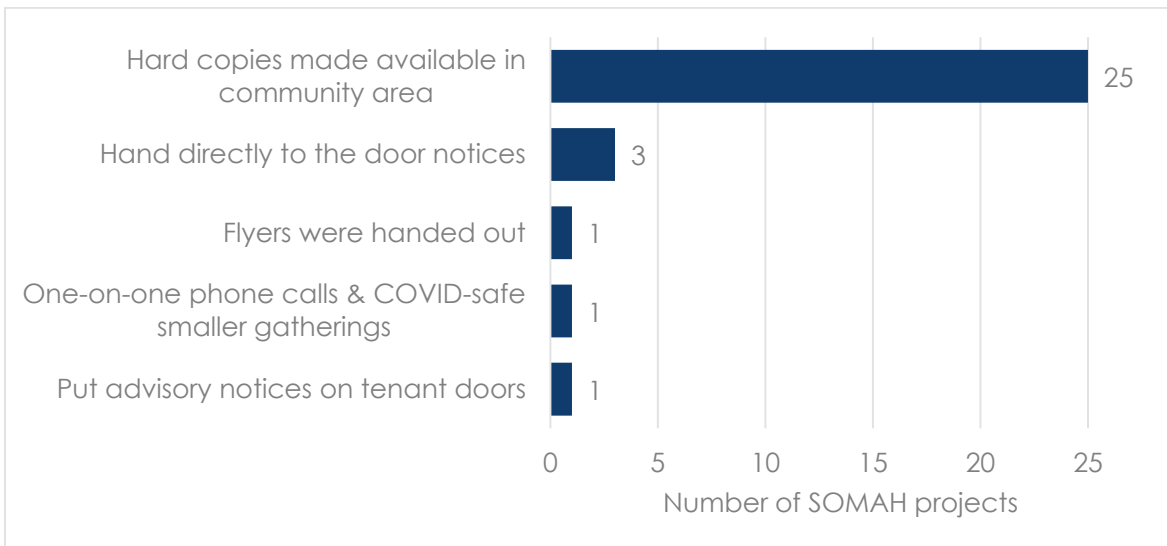
As the SOMAH PA begins to close projects and mail incentive payments, the SOMAH PA is also reviewing the [Affidavit Ensuring Tenant Education](#) to better understand how tenant education is being conducted and provided. Currently, there are 32 signed affidavits, of which 12.9% of projects met the first tenant education requirement outreach method via USPS and 87.1% via direct delivery to tenants. For the tenant education requirement outreach method, 25 of the 32 signed affidavits, or 78%, are leaving SOMAH-approved materials in common areas within the property.

**Figure 34 – Method of Delivery for Tenant Education Materials, First Requirement**



N = 31

**Figure 35 – Method of Delivery for Tenant Education Materials, Second Requirement**



N = 31



While the second method of tenant education outreach is not prescribed, the PA is learning that the way participants are providing tenant education is not meeting the intent of the requirements – to ensure tenants are ready and aware of the benefits of SOMAH. The SOMAH PA intends to utilize the data collected from the [Affidavit Ensuring Tenant Education](#), the tenant education surveys and interviews to inform regulatory changes to the tenant education requirements.

Finally, to evaluate SOMAH's tenant education materials, the SOMAH PA also started conducting tenant education focus groups in May 2022. These focus groups are engaging multifamily affordable housing tenants in SOMAH buildings throughout California. A total of three focus groups, with five participants each, are being conducted. Each focus group will be conducted in a different primary language: English, Spanish and Cantonese. The SOMAH PA is working with a third-party vendor to conduct the focus group process, which will be conducted through phone interviews. The results of these focus groups will be shared in future progress reports and will be used to update tenant education materials to be engaging and effective for residents receiving solar through the SOMAH Program.

### 3.2.6 Stakeholders

The SOMAH Program relies on stakeholder partnerships to ensure the program is marketed effectively across the state. SOMAH's central objective with stakeholders is to increase program awareness and credibility through co-marketing and cross-promotion with existing, trusted stakeholder programs. SOMAH stakeholders include IOUs; city, county and state government offices (both appointed and elected); CCAs; California energy efficiency program administrators; and regional organizations or regional energy networks (RENs).

The Phase II third-party evaluation and internally administered surveys indicate that SOMAH needs to increase its brand awareness. These evaluations noted that multifamily affordable housing owners may not be aware of the SOMAH Program. This is because of the program's relative newness and niche eligible portion of California's rental population. As 2021 was a year to build stakeholder relationships, 2022 has seen notable strides in outreach opportunities.

#### **IOUs & CCAs**

IOUs co-marketing with the SOMAH Program is valuable for increasing brand recognition of the program. The program's engagement with the IOUs continued with monthly SOMAH IOU Working Groups as well as individual meetings with representatives of the IOUs, including Single Point of Contact (SPOC) staff at PG&E, SCE and SDG&E. Efforts that took place thus far in 2022 include obtaining IOU logos for SOMAH's



homepage. By Q4 2022, the IOU logos will be placed on the SOMAH website to help increase legitimacy of the program. Other efforts include:

- Liberty Utilities: Co-hosted Small Municipal Jurisdiction Utilities (SMJU) webinar “Leveraging Low-income and Clean Energy Programs Public Workshop,” featuring SOMAH.
- PacifiCorp: Created mailers to send to all affordable housing properties; Co-hosted SMJU webinar “Leveraging Low-income and Clean Energy Programs Public Workshop,” featuring SOMAH.
- PG&E: Worked closely with SPOC and ESA-CAM representatives to establish co-marketing efforts. SPOC held webinar with all PG&E energy efficiency programs; SOMAH was unsuccessful at co-marketing with the SPOC program Electric Vehicle Charge Program.
- SCE: Worked with SCE SPOC to discuss co-marketing opportunities including securing Charge Ready and ESA-CAM program information to be listed on the new SOMAH website as well as identified referral pathways for ESA projects to participate in SOMAH.
- SDG&E: SPOC introduced SOMAH to ESA-CAM representatives for co-marketing efforts. Direct email outreach to property owners was completed.

CCA outreach in this reporting period includes continuous collaboration with Peninsula Clean Power (PCE) and East Bay Community Energy (EBCE). Marin Clean Power (MCE) has reengaged with SOMAH through an introduction from Asian Pacific Environmental Network (APEN), a SOMAH CBO. MCE will also host a webinar featuring SOMAH in Q3 2022. SOMAH continues to be featured on websites for Clean Power Alliance (CPA), San Jose Clean Energy (SJCE) and Clean Power San Francisco (Clean Power SF).

### **Local Governments**

The SOMAH PA continues to focus on outreach to government offices for both virtual co-marketing opportunities and in-person engagement at on-site ribbon-cuttings where projects are coming to a big milestone, such as interconnection and project completion. This reporting period, SOMAH has had three introduction calls with the City of San Luis Obispo, City of San Jose and the County of San Diego.

The SOMAH PA has engaged local governments for video testimonials and will be featuring quotes from these interviews on the program’s website, social media channels, success stories and various marketing materials.



## **CBO Stakeholder Outreach**

In 2021, SOMAH expanded the scope of its contracted CBOs to include government outreach. SOMAH's CBOs have existing relationships with local governments across the state that can be leveraged to support SOMAH's local government outreach. This reporting period, CBO outreach goals are being finalized with efforts focusing on engaging government offices in DACs, as well as engaging elected local government officials, including city council members and mayors. Successful collaborations include:

- Asian Pacific Environmental Network (APEN): Introduction to MCE representatives; SOMAH will be leading a webinar hosted by MCE in Q3 2022. Introduction meeting with City of Alameda and SOMAH.
- Environmental Health Coalition (EHC): Held workshop with County of San Diego's Decarb Collaboration with 52 attendees. Introduction to County of San Diego representatives and the SOMAH PA.
- Self-Help Enterprises (SHE): Meeting with County Supervisor Eddie Valero's Office (District Four, County of Tulare), City of Farmersville, City of Tulare and City of Portersville.
- Community Environmental Council (CEC): Collaborating with the Tri-County Regional Energy Networks (3C-REN) for an energy efficiency program webinar in July 2022, highlighting SOMAH.
- OC Goes Solar (OCGS): Connected with City of Irvine staff and will be meeting with Irvine's City Manager in 2022 to discuss the SOMAH program.

## **Regional Energy Networks**

In this reporting period, the SOMAH PA has implemented a referral process between SOMAH, IOUs, SPOCs and RENs (regional energy networks). This process involves IOUs (Liberty Utilities and PacifiCorp), SPOCs and RENs completing an online form for leads from their respective programs and sending them to the PA for technical assistance. This effort has been a collaboration across these stakeholders and will ideally remove barriers to stacking eligible incentive programs with SOMAH. The SOMAH PA will track which referrals are sent from specific RENs and IOUs and which referrals turn into applications.

SOMAH has established co-marketing partnerships with Bay Area Regional Energy Network (BayREN) and Southern California Regional Energy Network (SoCalREN) through which collaboration meetings are held regularly. During this reporting period, BayREN helped SOMAH co-host a webinar with the Bay Area Multifamily Building Enhancements Program (BAMBE) that had over 80 attendees. Post-webinar follow-up led to calls with interested property owners who attended the webinar. SoCalREN





included SOMAH's Applicant and Contractor Eligibility Training in their April and May newsletters. SoCalREN and SOMAH are currently planning a webinar for July 2022.

### 3.3 Workforce Development

A primary goal of the SOMAH Program is to promote economic development in low-income and underserved communities through paid job training opportunities, emphasizing local and targeted hiring of individuals who experience barriers to entering the solar workforce. The SOMAH PA continues to reach this goal by:

- Conducting targeted outreach to job training organizations (JTOs) across the state to engage prospective job trainees.
- Empowering SOMAH's CBO partners with tools and resources to connect local job seekers to training opportunities.
- Engaging tenants of SOMAH properties to take advantage of SOMAH job training opportunities.
- Organizing career development workshops and resources for job trainees to promote awareness of job training opportunities and address barriers to employment.
- Supporting contractors with trainee recruitment and workforce development.
- Gathering feedback from SOMAH's Job Training Organization (JTO) Task Force.

During this reporting period, the SOMAH PA also mutually ended its partnership with Rising Sun Center for Opportunity, a workforce development partner organization that was integral to the initial development and launch of SOMAH's job training initiatives. This transition will allow Rising Sun to redirect staff capacity and resources to pursue new strategic directions and workforce development ventures. The SOMAH PA has onboarded new staff to its workforce development team to fill capacity gaps from Rising Sun's departure and add additional capacity to support contractors with job training and workforce development.

#### **Job Training Organization Outreach & Job Trainee Engagement**

The current SOMAH application pipeline creates 796 potential job training opportunities. To broaden SOMAH's pool of eligible job trainees to participate in these opportunities, the SOMAH PA continues to actively contact and vet JTOs that serve targeted trainees and geographic regions where there is a high volume of SOMAH projects and lower JTO engagement, including the Central Valley, Inland Empire and San Diego County. The SOMAH PA also continues to focus outreach to JTOs that serve priority populations, such as justice system-impacted individuals and those facing other barriers to employment.



In this reporting period, the SOMAH PA has verified eligibility of two new JTOs, for a total of 64 active, eligible JTOs. The SOMAH PA has had lower engagement with JTOs during this last reporting period due to temporarily decreased capacity with the transition of Rising Sun from the program but will increase engagement in the second half of 2022 with new staff capacity to focus on JTO partnerships. Despite a limited increase in new JTO partnerships, the SOMAH PA continues to maintain strong engagement with existing JTO partners, who continue to connect their students and graduates with the SOMAH Program. In Q1 and Q2 2022, the SOMAH PA added 31 new job trainees to the SOMAH Job Training Portal for a total of 397 job trainees engaged on the Job Training Portal.

In addition to engaging with JTOs across the state to expand SOMAH's network of eligible job trainees, the SOMAH PA continues to work with CBOs, including two new CBOs, to inform their local communities about SOMAH's job training opportunities and facilitate local JTO connections. The SOMAH PA is also increasing tenant participation in the job training opportunities through tenant education services.

The SOMAH PA continues to engage with job trainees and solar job seekers by facilitating career development workshops. In July 2022, the SOMAH PA will host a Solar Career Pathways webinar for job seekers to understand various career opportunities in the solar industry and the training and skills that will support their success in solar careers. The SOMAH PA also continues to develop a resources page on the Job Training Portal that will include access to free online solar training courses and a directory of local supportive services where job seekers can access support for transportation, childcare or other barriers to employment.

### **Contractor Job Training Support**

The SOMAH PA continues to support participating contractors in meeting the job training requirements by directly connecting local job seekers and job trainees from the Job Training Portal to contractors with projects near installation. During this reporting period, the SOMAH PA has received and facilitated three requests for support with job training from SOMAH contractors. As a result of this support and existing resources for contractors, all SOMAH projects that submitted the Job Training Affidavit with the Incentive Claim Milestone met 100% of the job training requirements.

Additionally, the SOMAH PA continues to organize and host programming to help contractors meet their job training requirements and support local and targeted hiring goals. In March 2022, the SOMAH PA hosted a webinar for contractors, *Hiring with Purpose: Inclusive Hiring Practices for Solar Employers*, where equity, inclusion and diversity professionals in the solar industry shared their knowledge, best practices and



tips on how to incorporate inclusive hiring practices during the hiring process. The webinar had 33 registrants and 18 attendees.

### 3.3.1 Local Hiring and Job Training Data

Since the last reporting period, the SOMAH PA has received 44 more Job Training Affidavits from projects that have reached the Incentive Claim Milestone for a total of 67 projects that have submitted job training data via the Job Training Affidavit. The Job Training Affidavits report 56 job trainees hired to work on SOMAH projects for 126 job training positions, with many of the job trainees working on multiple SOMAH projects, gaining more hands-on experience and solar installation skills. The SOMAH PA has collected demographic information on 33 of the 56 hired job trainees (shown below). Data on job trainee advancement (i.e., the number of SOMAH trainees who become full-time solar employees) and retention is collected through surveys to contractors after each project reaches the Incentive Claim Milestone. To date, the SOMAH PA has received 79 job training surveys, and nine job trainees were reported to be hired by the contractor for continued employment.

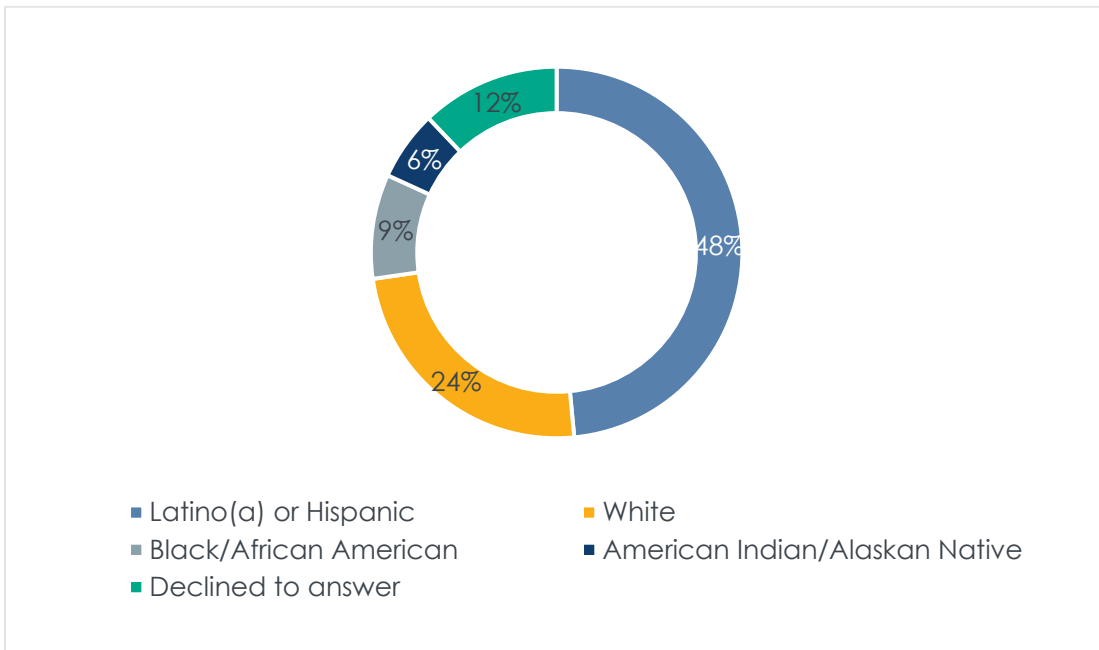
#### **Hired Job Trainee Data**

##### Local & Targeted Hires

- 27.27% of job trainees reside in DACs.
- 38.89% of job trainees were local hires (live in the same county as the SOMAH project).
- 15 tenants of SOMAH properties participated as job trainees.
- 87.88% of job trainees were targeted hires.<sup>14</sup>
  - 15.15% of job trainees reported that they have been impacted by the criminal justice system.
  - 45.45% reported as unemployed or underemployed at the time of SOMAH intake.
- 15 job training organizations have students or graduates that have participated in SOMAH job training opportunities.

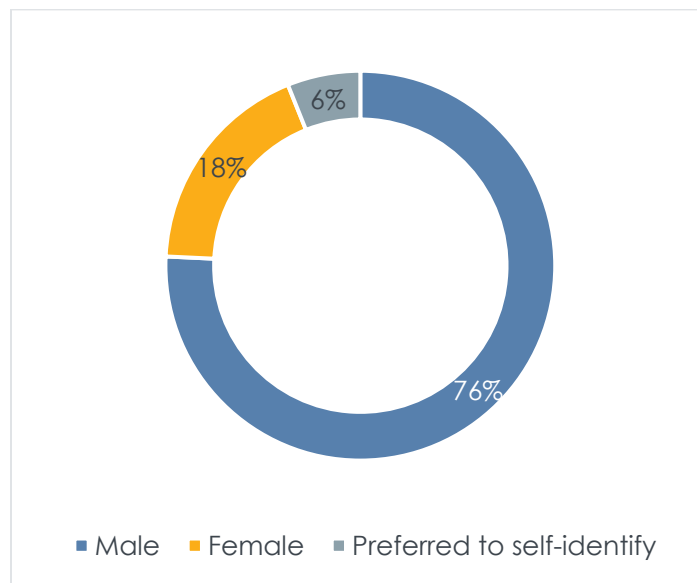
<sup>14</sup> SOMAH defines “targeted hire” as a resident of a disadvantaged community, affordable housing resident, woman, person of color or someone who has faced or overcome at least one barrier to employment.

**Figure 36 – Job Trainee Race/Ethnicity Breakdown**



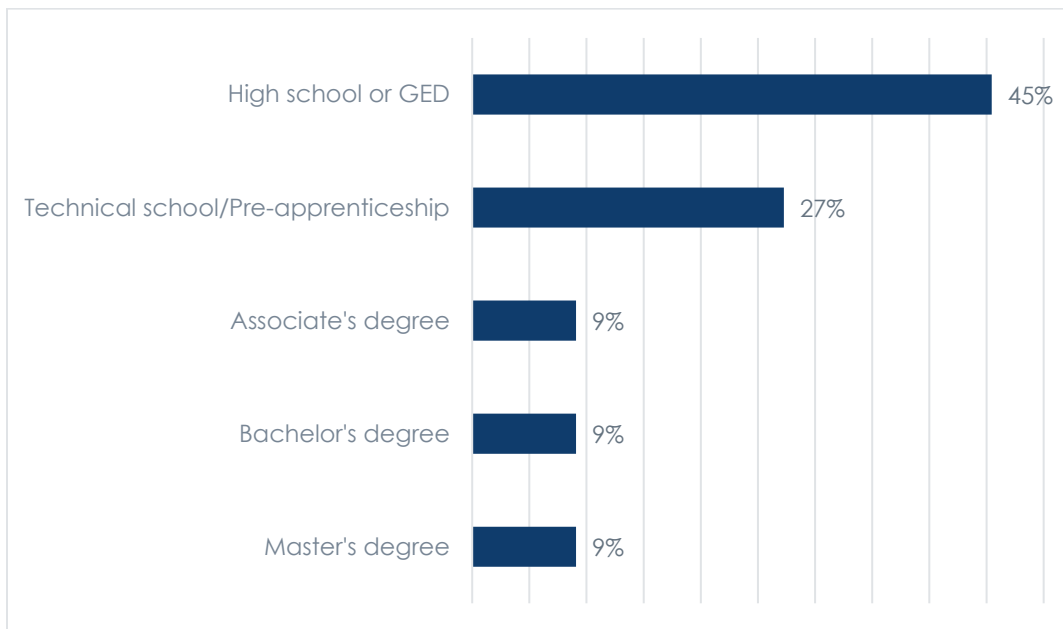
N = 33

**Figure 37 – Job Trainee Gender Breakdown**



N = 33

**Figure 38 – Highest Level of Job Trainee Education**



N = 33

Types of job training tasks

- 90.48% of job training positions focused on direct photovoltaic installation.
- 9.52% of job training positions focused on post-installation operations and maintenance.

Wages & employment

- Average job trainee wage = \$20.54 per hour.
- Average number of hours worked per trainee per project = 73.61 hours.
- 108 of the job training positions were temporary hires.
- 18 of the job training positions were permanent hires.

### 3.4 Technical Assistance

The SOMAH Program offers two technical assistance (TA) options: upfront TA and standard TA. Installing solar on existing multifamily properties often requires property owners to navigate and overcome barriers, including complicated ownership and financing structures as well as crunching the numbers on solar costs and benefits. To help level the playing field and overcome these barriers, the SOMAH Program offers



two TA options to provide personalized technical assistance to bridge these knowledge gaps and to help facilitate solutions to common issues faced along the way.

### 3.4.1 Upfront TA

Upfront TA services are designed to supply property owners participating in Track A with educational, technical and financial resources to facilitate their solar installation. Offering upfront TA services not only sets the SOMAH Program apart from similar previous programs but provides property owners who are less familiar with solar with equal access to program benefits.

Property owners enter Track A with varying levels of solar knowledge. Through guidance from a designated energy project manager, each property owner receives personalized support to accommodate their specific needs, including understanding the SOMAH Program process, investigating the solar potential at their property through the presentation of a solar feasibility report, selecting an eligible contractor using a multiple bid process and evaluating the costs and benefits of moving forward with a solar project.

Tenant benefits continue to be a central pillar of the SOMAH Program as well as a focus within Track A. To date, there have been seven Track A projects that have received upfront TA services. One additional project received upfront TA approval at the end of the reporting period. For the seven Track A projects that have received upfront TA services, over 600 low-income households are projected to receive direct benefits from solar credits, and 80% of the clean energy produced is expected to benefit tenants via VNEM bill credits. The energy produced by these proposed systems is expected to offset approximately 78% of the tenants' historic annual electrical consumption. The average estimated system size for the seven projects is 182 CEC-AC kW with an average expected aggregate annual output of 299,034 kWh.

Figure 39 outlines additional system statistics across the IOU territories for the seven Track A projects that have been approved for and received upfront TA services.



**Figure 39 – Track A Summary**

IOU	Number of Track A Projects Approved for Upfront TA	Estimated SOMAH Incentive	Estimated System Size (CEC-AC kW)	Expected Aggregated Annual Output (kWh)
PG&E	3	\$1,304,283	501	775,633
SCE	4	\$1,733,495	772	1,317,605
SDG&E	0	\$0	0	0
Liberty Utilities	0	\$0	0	0
PacifiCorp	0	\$0	0	0
Total	7	\$3,037,778	1,273	2,093,238

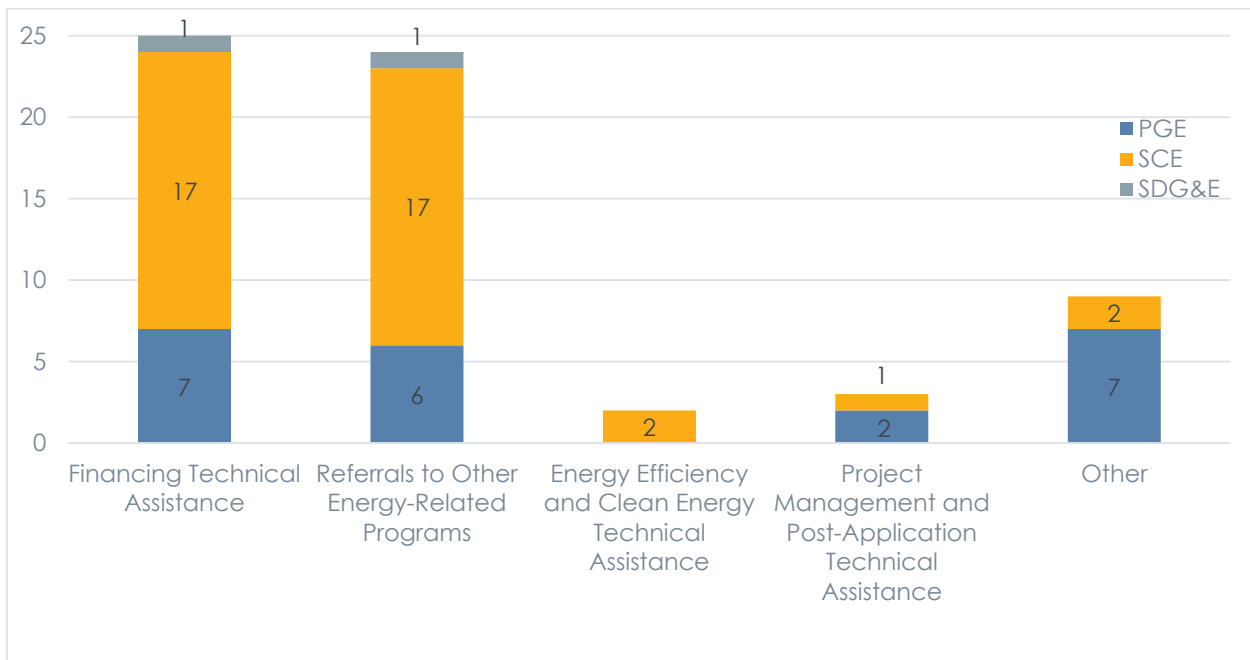
Tenants will receive added benefits from the Track A projects that have decided to pursue deep energy retrofit scopes in conjunction with solar. Three out of the seven projects were either referred to SOMAH from a comprehensive energy efficiency program in which they are currently enrolled or used upfront TA services to receive a referral to, and enroll in, a comprehensive energy efficiency program.

To improve property owners' understanding of the intricate ownership and financing structures available, the solar feasibility report presented to property owners during upfront TA has been updated to provide additional clarity on the system ownership options available, including a financial summary that compares the costs and benefits of common metrics across the different ownership types. The updates will further ensure that property owners are presented with offerings that they are likely to find in the market from contractors who bid on their projects.

### 3.4.2 Standard TA

Standard TA services are available to both Track A and B projects and can be requested by property owners or their contractors at any time during their enrollment in SOMAH. Challenges and questions can arise at any point during a solar project, and standard TA services are designed to aid property owners and contractors when needed.

**Figure 40 – Standard TA Services Requested**



Most of the standard TA services provided to date have been financial assistance and referrals to other energy-related programs for projects looking to leverage SOMAH with other similar programs. Standard TA services were provided to two projects to identify pathways to consider electrification and for assistance sizing their SOMAH PV system to account for energy efficiency upgrades. Other standard TA services that were provided include Energy Efficiency Compliance Milestone support, general program support, solar feasibility and utility data analyses. To date, 35 projects have made a total of 63 standard TA requests. Figure 40 shows the breakdown of standard TA services provided across the IOU territories.

## 4. Program Planning and Development

The SOMAH PA takes an adaptive approach to ensure that feedback is regularly solicited from program participants and stakeholders and that the SOMAH PA is making decisions about the program with transparency. It works in close partnership with the program's advisory bodies and CBO partners, along with input from other stakeholders, to ensure the program remains accountable to the communities it was intended to benefit. The following section provides information on the SOMAH PA's maintenance of official records as well as its feedback mechanisms.





## Official Record Maintenance

The SOMAH Program has various types and frequencies of public reporting. The information below outlines these reports and their location.

- SOMAH Incentive Budget Report and Working Data Set (updated weekly)
- Semiannual Progress Reports
- Semiannual Expense Reports
- Annual marketing, education and outreach (ME&O) plans

Place of record: [https://www.californiadgstats.ca.gov/programs/#\\_subsection\\_17](https://www.californiadgstats.ca.gov/programs/#_subsection_17)

- Special reports to the California Legislature
- Third-party evaluation reports

Place of record: <https://www.cpuc.ca.gov/General.aspx?id=6442454736>

During this reporting period, the SOMAH PA highlights: 1) an update on activities related to reporting, feedback and accountability; and 2) approved handbook updates including setting targets for DAC participation in the program.

## 4.1 Reporting, Feedback and Accountability Mechanisms

The SOMAH Program has several accountability and feedback mechanisms to ensure that key stakeholders contribute to program development and implementation. These include two advisory bodies, public forums and monthly working meetings with the participating SOMAH IOUs. Based on feedback from the Vendor Assessment Third-Party Evaluation, the SOMAH PA is transitioning to a cadence of 2-3 public forums per year to align with program activity and valuable stakeholder engagement opportunities instead of maintaining four quarterly meetings by default. Further coordination with relevant stakeholders will be supported by email newsletters (launching very soon).

### 4.1.1 Public Forums

SOMAH public forums allow the SOMAH PA to 1) share program updates; 2) propose program modifications and design changes; and 3) solicit feedback from program stakeholders about their experience with the program – challenges, barriers and areas for improvement.

The SOMAH PA held two public forums during this reporting period. Both included an update on key program statistics and activities across SOMAH's different program areas. In addition to the general program update on key stats and announcements, the Q1 2022 Public Forum included a session that presented key recommendations from



SOMAH's third-party evaluation along with program initiatives and next steps for implementing those recommendations. The Q2 2022 Public Forum included a session on proposed updates to streamline SOMAH's application process and a session on proposed updates to SOMAH's annual incentive step-down structure and incentive rates (more information included in Section 4.2.2, Incentives Petition for Modification).

The SOMAH PA publishes the public forum presentation slide decks and meeting notes, including stakeholder questions and SOMAH PA answers, via the CalSOMAH.org website following each public forum event.

Q1 2022 Public Forum place of record

- [SOMAH Public Forum Q1 2022 Presentation](#)
- [SOMAH Public Forum Q1 2022 Notes](#)

Q2 2022 Public Forum place of record

- [SOMAH Public Forum Q2 2022 Presentation](#)
- [SOMAH Public Forum Q2 2022 Notes](#)

#### 4.1.2 IOU Working Group

During the reporting period, the SOMAH PA held three IOU Working Group meetings (February, April and May). The Q1 and Q2 working groups focused on:

- Feb. – Handbook updates, website revisions, SPOC and SOMAH promotion
- April – Tenant meter numbers, interconnection, SOMAH tariffs and SGIP resiliency
- May – Program and marketing coordination updates, IOU/PA response to recommendations overlap

Referrals and co-marketing between the IOUs and SOMAH are explored further under Section 3.2.6, Stakeholders.

#### 4.1.3 SOMAH Advisory Groups

SOMAH's two advisory groups are the SOMAH Advisory Council and the Job Training Organization (JTO) Task Force. These advisory groups help ensure that the program is staying accountable to the communities that it was intended to serve.

##### **Advisory Council**

The purpose of the [SOMAH Advisory Council](#) (SOMAH AC) is to ensure that the voices and interests of equity-focused community advocates and key stakeholders remain at



the center of the SOMAH Program and that SOMAH maximizes benefits to low-income tenants and DACs by advising the SOMAH PA on program development and implementation. Since the close of 2021, the SOMAH PA welcomed a new cohort of SOMAH AC members, which were selected through an independent selection committee and process. There are 11 members in this cohort – six new members and five returning members – that represent the fields of environmental justice, workforce development/labor, tenant rights and economic justice, affordable housing, tribal communities and the solar industry. The SOMAH AC meets virtually each quarter.

Q1 2022 was the first meeting with the new SOMAH AC cohort. Topics and discussions included:

- Time for introductions and building connections between AC members.
- A re-orientation to the SOMAH Program and SOMAH AC, reviewing program requirements and areas of focus, program updates, the role and purpose of the SOMAH AC and council governance documents.
- AC members discussed a collective vision for SOMAH's future and identified areas of interest and how they see themselves supporting this vision and the work of the council.

The SOMAH PA held an ad-hoc meeting in May that presented an overview of the SOMAH PA's proposed Petition for Modification to remove the annual incentive step-down and update SOMAH's incentive rate. Some key items from the advisory council's discussion included:

- Whether removing the annual incentive step-down and reversing to Year 1 incentive rates would be enough to increase participation to the levels needed to reach SOMAH's 300 MW goal.
- Encouraging flexibility to provide additional "adder"/supplemental incentives to help cover additional costs.
- Ensuring direct communication with contractors through focus groups and surveys to get a better understanding of cost barriers.

Q2 2022 meeting topics and discussions included:

- A continued discussion on how to increase the participation of California tribes in SOMAH. The SOMAH PA presented several strategies and approaches, starting with cultural competency training for the SOMAH PA and working with existing, related programs serving tribes to co-market the program. Expanding and developing specific technical assistance and support services for tribes was also



discussed, as well as partnering with a CBO that works with Native American communities.

- A presentation on tenant education survey trends and insights and a discussion around future strategies to improve tenant education and engagement.

### **Job Training Organization Task Force**

The purpose of the [Job Training Organization Task Force](#) (JTO Task Force) is to ensure that the voices and interests of job training organizations remain at the forefront of the SOMAH Program's job training efforts. The JTO Task Force advises the SOMAH PA on strategies for engaging job trainees and the creation of resources to ensure that trainees obtain maximum benefit from training opportunities on SOMAH installation projects, including subsequent, full-time job offers in the solar industry and, over time, career advancement and wage growth. The JTO Task Force is composed of nine regionally diverse representatives from JTOs, including California Community Colleges, career technical education programs, community nonprofits and private job training centers. Like the SOMAH AC, the JTO Task Force meets quarterly.

In November 2021, the SOMAH PA released a request for applications for new JTO Task Force members, and in February 2022, five new members were selected by a committee and joined the JTO Task Force. Five returning members continued into a second term for a total of 10 JTO Task Force members. The JTO Task Force should have regional representation from all regions of the state where SOMAH projects are taking place, but as of this reporting period, there are no JTO Task Force members representing the San Diego region. The SOMAH PA will continue targeted outreach to JTOs in San Diego to identify an eligible organization to join the current cohort. Since the last reporting period, the JTO Task Force has held two quarterly meetings.

Q1 2022 topics and discussions included:

- Providing additional context and background for new members in relation to program updates and progress, including a review of task force governing documents such as the bylaws.
- A review of last term's priorities, recommendations, progress to goals and successes for task force working groups.
- A collaborative priority-setting session to establish and align on priorities for the coming term.



Q2 2022 topics included:

- Approval of updated bylaws and nomination process for chair and vice chair positions.
- A review of SOMAH Program updates, including current project impacts, a review of incentive levels and an announcement of tribal land designation as DACs.
- A review and discussion of the top three priorities for the JTO Task Force: JTO engagement and job trainee placement; opportunity accessibility; and career advancement.

#### 4.1.4 Third-Party Program Evaluation

The [Phase II Evaluation](#) was finalized in October 2021, followed by the SOMAH PA working closely with Energy Division to complete the CPUC Response to Recommendation (RTR) process. The RTR was then finalized with [public comments and replies](#) in February. Subsequently, the [SOMAH Vendor Assessment](#) was released in February, and the SOMAH PA completed the [RTR](#) process for that vendor evaluation in the following weeks. The CPUC [website](#) maintains records of all files relating to the SOMAH evaluation reports.

Through the RTR process for both the Phase II Evaluation and Vendor Assessment, the PA formally indicated the response to or implementation plan for the evaluation's recommendations and addressed public comments where applicable. The SOMAH PA continues to work closely with the Energy Division to identify opportunities to incorporate key recommendations into the program's overall priorities and ME&O efforts. These opportunities for updates have been incorporated into the 2022 strategic planning efforts, along with the 2022 ME&O Plan. Some key recommendations include: 1) expanding SOMAH's technical assistance services; 2) co-marketing with trusted entities, such as IOUs and local/regional government offices and program administrators; 3) increasing participant diversity and participation by underserved communities; and 4) application streamlining. During regular check-ins with ED, the SOMAH PA and ED discuss ongoing actions for RTR implementation and overall program administration efforts.

The SOMAH PA presented on some of the recommendation implementation plans at the Q2 Public Forum with a session on streamlining SOMAH's application process, focusing on forthcoming updates to the Reservation Request Milestone and potential handbook changes, as mentioned in Section 3.1.0, Applications and Incentive Statistics. During the public forum, the PA spoke about a proposal for eligibility prescreening of the regulatory agreement or deed restriction document and reservation request



streamlining efforts focused on bringing relief and support to the Reservation Request Milestone. The optional affordability prescreen would function as an additional support service occurring outside of the application process to lower the administrative burden and time commitment for property owners and applicants to get a high-level, specified, review of a regulatory agreement document to support determination of property eligibility for the SOMAH Program. The Reservation Request Milestone streamlining would be an application workflow change to break the single milestone into two more manageable phases. The phased approach is aimed to reduce the initial administrative burden of starting and submitting the Reservation Request Milestone, provide a shorter timeline for the application to get to data request, and overall streamlining of the milestone requirements and process flow to better match project workflows from the customer acquisition, project design and engineering workflows.

Other RTR implementation efforts that are in process and underway with the PA include some of the following:

- Assessment of canceled applications and re-engagement screening for outreach.
- Expanded suite of support services to enhance the program's technical assistance offerings.
- Subcontractor engagement and partnerships with existing primary contractors to increase overall contractor diversity.
- Investigation and partnership with bridge loan assistance and assessment of supportive financing offerings.
- Review and refresh of property ownership type data to better capture characteristics of participating properties.

The SOMAH PA will continue to reference, incorporate and address key findings and recommendations from the Phase II Evaluation and Vendor Assessment into future internal evaluation efforts. Taken together, feedback and input from key audiences, participants, stakeholders and advisors will help inform and modify program areas to ensure the approaches are successful in reaching the audiences and communities SOMAH is designed to serve.



## 4.2 Program Design and Updates

This section provides an overview of program design changes and prospective changes as well as updates on related regulatory issues.

### 4.2.1 Program Handbook

This subsection reviews the SOMAH PA's work to update the SOMAH Program Handbook conducted during this reporting period, as well as relevant regulatory decisions not attached to the PA's work to update the SOMAH Program Handbook.

#### **Fifth Handbook Edition Development: Approved**

The SOMAH PA's proposed fifth handbook edition was submitted via a Tier 2 Advice Letter this period and approved after a stakeholder protest and some additional changes were made in response via a supplemental Advice Letter. Figure 41 provides a non-exhaustive overview of the SOMAH Program Handbook since the inaugural edition, including major updates by version.

**Figure 41 – Handbook Versions**

Version	Major Updates	Approval Date
Handbook 1.0 (original)	<ul style="list-style-type: none"> <li>Established original program offerings and requirements</li> </ul>	March 2019
Handbook 2.0	<ul style="list-style-type: none"> <li>Addressed SOMAH &amp; MASH stacking</li> </ul>	May 2020
Handbook 3.0	<ul style="list-style-type: none"> <li>Implemented Progress Payments</li> </ul>	December 2020
Handbook 4.0	<ul style="list-style-type: none"> <li>Established an application pipeline management system (lottery)</li> <li>Set a required notification process for early job trainee termination</li> <li>System changes affecting incentive amounts</li> <li>Assorted minor updates</li> </ul>	May 2021
Handbook 5.0	<ul style="list-style-type: none"> <li>Code of Conduct</li> <li>Application fee waiver for target groups (i.e., DACs)</li> <li>Formal program benchmark targeting 40% of projects in DACs by 2026</li> <li>Clarification of eligibility across CalEnviroScreen versions</li> </ul>	April 2022



	<ul style="list-style-type: none"> <li>• Removal of required Cover Sheet for Multifamily Affordable Housing</li> <li>• Option to submit PPM with EECM</li> <li>• Minimum time requirement for Progress Payment filing from four to two months</li> </ul>	
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The SOMAH PA is committed to continuous improvement in program planning and development, while balancing the need for robust stakeholder engagement in proposing updates and reducing program complexity to the maximum extent possible. With those guiding principles, the SOMAH PA worked closely with stakeholders this period to address program gaps and ensure it is being implemented in ways that provide meaningful economic benefits to participating tenants and properties, particularly in the state's environmental justice communities.

Advice Letter AL 133-E was submitted on February 15, 2022, and approved on April 28, 2022, with the following changes made after the initial submission, accounting for stakeholder feedback submitted via a protest during the public comment period. In addition to the approval of the SOMAH PA's other proposed changes, explored in detail in the previous SAPR, the SOMAH PA's Supplemental Advice Letter, AL 133-E-A, included additional changes to avoid confusion around stakeholder participation as it relates to the Code of Conduct. These changes included: updating language around compliance with the participant Code of Conduct to outline that the severity of noncompliance will be at the discretion of the PA and adding language prior to listing of SOMAH's advisory bodies to clarify that neither advisory group is a participant of the application process, and therefore, they do not need to adhere to the application requirements outlined in the SOMAH Program Handbook.

**Sixth Handbook Edition Development: Planning Stages**

Beginning in Q3, the SOMAH PA will draft another handbook update to incorporate revisions that will further streamline the program application process in response to recommendations from the recently completed Third-Party Evaluation. These changes will include:

- Streamlining the Reservation Request Milestone by restructuring it into two phases.
- Waiving of application fees /deposits for all projects.





More information on the SOMAH PA's response to recommendations and application streamlining is included in Section 4.1.4, Third-Party Evaluation. The SOMAH PA is continuing to identify and align on additional updates to include in the next handbook update.

#### 4.2.2 Incentives Petition for Modification

The SOMAH PA will submit a Petition for Modification (PFM) to address the program's annual incentive step-down and incentive levels. The SOMAH PA was intent on making the proposal as straightforward as possible to address the current standstill of applications without bringing additional complexity to the program. The goals of the PFM are to: 1) eliminate the current annual incentive step-down methodology; 2) increase the incentive levels to better align with project costs; 3) prioritize DAC and tribal land properties with a higher incentive; and 4) authorize the SOMAH PA to propose future modifications through a Tier 2 Advice Letter. Through increased incentives, the SOMAH PA intends to jumpstart the program, supporting both the existing project pipeline and attracting new applications. With slowing of applications over the past year (aside from the October 2021 incentive step-down spike), the high level of currently available funding represents an unnecessary delay in delivering energy credits and direct financial benefit to tenants across the state at a time of historic inflation. Increasing incentives to the proposed levels will spur participation, allow for the SOMAH Program to achieve the 300 MW minimum installation target and support the programmatic benchmark of 40% of participating projects located in DACs.

The SOMAH Program has had two incentive step-downs since program launch in 2019, the first in July 2020 and the second in October 2021, and incentives have decreased roughly 7.2% since Year 1 overall. Supporting rationale for removing the incentive step-down mechanism includes that fact that AB 693 did not prescribe an incentive step-down, but instead indicated that the program must be "aligned with the installation costs for solar energy systems in affordable housing markets and take account of federal investment tax credits and contributions from other sources to the extent feasible." Additionally, per CPUC D.17-12-022, "Incentive levels will decrease by the annual percent decline in residential solar costs as reflected by NREL reports, or 5% annually, whichever is less," which is the language the SOMAH PA seeks to address with the Incentives PFM. As highlighted by the Third-Party Evaluation, SOMAH is not a market transformation program, and the report references that "[i]ncentive step-downs are typically used for market transformation programs that strive to increase demand for a technology and consequently drive down costs for that technology and therefore the incentives required," whereas, "[t]he affordable housing properties that the SOMAH Program was developed to serve are reliant on program incentives to install solar, and



there is no reason to believe that the need for incentives is going to change over the life of the program or after the program has ended." Stated differently, SOMAH's incentives are the mechanism through which the "split incentives" barrier is overcome, and without them, owners have little-to-no motivation or means through which to provide tenants the benefits of solar energy. There is also precedent for not having an incentive step-down, given that the MASH program, SOMAH's predecessor program, did not have an incentive step-down even though the larger market rate program, the California Solar Initiative, which fell under the same program umbrella did have a step-down.

The SOMAH PA has worked with the SOMAH Advisory Council and CPUC staff to define program goals for participation by eligible properties located in DACs. As mentioned in Section 3.1.1, the SOMAH PA issued a DAC Participation Memo<sup>15</sup> in November 2020 that described strategies for increasing participation by eligible properties located in DACs. These strategies included establishing a programmatic benchmark for DAC participation across IOU territories, as well as setting a higher incentive structure for properties in DACs. A target of 40% of all participating SOMAH projects located in DACs was established in the SOMAH Program Handbook 5th Edition. The availability of higher incentives for projects located in DACs, in tandem with enhanced marketing, education and outreach efforts already underway, should generate additional demand, spur contractors to seek out additional projects in these areas, attract new contractors to participate in the program (thereby increasing contractor diversity), increase the share of host customer-owned systems and improve financial viability for projects already under consideration.

The SOMAH PA reviewed SOMAH Program cost data from the Third-Party Program Evaluation, along with external market analyses that indicate multifamily solar PV costs are increasing. Specifically, the Third-Party Evaluation noted that the initial projects in the SOMAH Program represent the low-hanging fruit that are easier to complete or are part of a larger portfolio of properties. The SOMAH PA believes that projects now are going to be harder for contractors to acquire and/or will require more complex installations and will only continue to increase in difficulty with future years. If the incentives were to continue to decrease while project costs increase, and project

<sup>15</sup> The January 2021 [Semiannual Progress Report](#) includes a summary of the 2020 CPUC DAC Participation Memo.



complexity and customer acquisition difficulty increases, the task of meeting the 300 MW goal becomes increasingly difficult.

To address the timing of the annual July step-down, the SOMAH PA also submitted an extension request on June 24, 2022, to pause the incentive step-down. The request was subsequently approved on June 30, 2022, providing the SOMAH PA the opportunity to submit the PFM by October 1, 2022, with the incentive step-down paused until the PFM has been determined by the CPUC.

## 5. Conclusions

Through the first half of 2022, SOMAH maintained available funding in all five IOU territories but experienced an ongoing shortfall of new application submissions since the October 2021 incentive step-down. In the active application queue, there was a significant uptick in use of the optional Progress Payment Pathway along with the forecasted increase in completed projects coming to fruition with activity seeing the largest increase in Q2. The increase in completed projects is a steady stream that is anticipated to build over the summer months in Q3, providing opportunities for additional program data collection, feedback from project closeout surveys and celebrations of interconnected projects with ribbon-cuttings and educational events that are expected to spur further participation. The PA hopes to jumpstart the program with the forthcoming Incentives Petition for Modification and preserve access to the existing Step 3 incentives with the extension request.

ME&O efforts are continuous for the SOMAH Program at all stages of project timelines: 1) before an application is submitted to get property owners and contractors to apply; 2) during the project for tenants, job trainees and applicants to obtain adequate resources; and 3) after the project is over to help exemplify success stories. Paid media campaigns, in-person conferences and workshops, as well as increases in co-marketing partnerships, is helping build SOMAH brand awareness. As the number of project closeouts continues to increase, the SOMAH PA will be able to further showcase what makes SOMAH a unique program that benefits communities as a whole.

Workforce efforts continue to connect a network of job training organizations, trainees and employing contractors with data emerging around trainee demographics and post-training employment with the completion of more projects this period. Technical assistance (TA) continues to support projects already within the program via standard TA and represent the program's only new applications via upfront technical assistance this period, providing applicants a baseline education around solar, its potential



benefits on a site-specific basis and connection to bidding contractors amid process and communications improvements underway stemming from SOMAH's third-party evaluation process.

For the remainder of 2022, the PA will continue implementation efforts for the Phase II and vendor evaluation efforts to wrap up the responses to recommendations. While the Petition for Modification is under review with the CPUC, the PA will focus on development of Handbook 6.0 with the target to file in Q3, in order to further lower administrative barriers to participation for applicants and improve service delivery in general. Stakeholder feedback and collaboration remains a strategic engagement point for the SOMAH PA as continued partnership with stakeholder and participants yields the most productive and innovative results for the program. With 44 completed projects at the close of this reporting period, 3,745 tenant households will benefit from SOMAH by receiving monthly bill credits. The SOMAH PA looks forward to the rapid acceleration of the delivery of the benefits of solar energy to tens of thousands more Californians through 2022 and in years to come.

## 6. Appendix A

As referenced in Section 3.1.1, Application and Incentive Statistics, following is the description of PowerClerk statuses.

### *Upfront Technical Assistance*

- Upfront Technical Assistance Request Submitted: Applicant has entered the required information and uploaded the Upfront Technical Assistance Request documentation for program administrator review.
- Upfront Technical Assistance Review: Upfront Technical Assistance Request is under review by the program administrator.
- Pending QA – Upfront Technical Assistance Request: The Upfront Technical Assistance Request has been reviewed by the program administrator and is pending quality assurance check.
- Suspended – Upfront Technical Assistance Request: Upfront Technical Assistance Request is incomplete or requires further action by the applicant. The program administrator sent correction information via email from the PowerClerk portal.
- Overdue – Technical Assistance Request Follow-up: The requested corrections for the Upfront Technical Assistance Request are overdue and should be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Resubmitted – Upfront Technical Assistance Request: The Upfront Technical Assistance Request has been resubmitted with corrections and is in queue for review by the program administrator.
- Upfront Technical Assistance Approved: Applicant has entered the required information and uploaded the reservation request documentation for review.

### *Reservation Request Milestone*

- Reservation Request Submitted: Applicant has entered the required information and uploaded the reservation request documentation for review.
- Reservation Request Review: Reservation request is in queue for review by the program administrator.
- Pending QA – Reservation Request: Reservation request is under final review by the program administrator.
- Suspended – Reservation Request: Errors were found during reservation request review and require corrections by the applicant. The program administrator sent correction information via email from the PowerClerk portal.



- Overdue Corrections – Reservation Request: The requested corrections for the reservation request are overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Resubmitted – Reservation Request: The reservation request has been resubmitted with corrections and is in queue for review by the program administrator.
- Pending Data Request: The application is in queue to be sent to the IOUs for electric usage data request.
- Pending IOU Data: Electric usage data has been requested from the IOU.
- Processing IOU Data: Electric usage data has been received and is under review by the program administrator.
- Pending Application Deposit: Reservation request is free of errors and pending receipt of the application deposit before moving to reservation approved status.
- Overdue – Application Deposit: The application deposit is overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Reservation Approved: Reservation request requirements have been met and the application deposit has been received. The project's funding will be reserved for 18 months, starting from the reservation approval date.

#### *Energy Efficiency Compliance Milestone*

- Overdue – Energy Efficiency Compliance Milestone: The Energy Efficiency Compliance Milestone is overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Energy Efficiency Compliance Milestone Submitted: Applicant has entered the required information and uploaded the Energy Efficiency Compliance Milestone documentation for review.
- Energy Efficiency Compliance Milestone Review: Energy Efficiency Compliance Milestone is in queue for review by the program administrator.
- Pending QA – Energy Efficiency Compliance Milestone: The Energy Efficiency Compliance Milestone has been reviewed by the program administrator and is pending quality assurance check.
- Suspended – Energy Efficiency Compliance Milestone: Errors were found during Energy Efficiency Compliance Milestone Review and require corrections by the applicant. The program administrator sent correction information via email from PowerClerk.
- Overdue Corrections – Energy Efficiency Compliance Milestone: The requested corrections for the Energy Efficiency Compliance Milestone are overdue and



must be submitted as soon as possible. Please contact the program administrator if assistance is required.

- Resubmitted – Energy Efficiency Compliance Milestone: The Energy Efficiency Compliance Milestone has been resubmitted with corrections and is in queue for review by the program administrator.
- Energy Efficiency Compliance Milestone Approved: Energy Efficiency Compliance Milestone requirements have been met.
- Pending Site Verification: Program administrator is completing a Site Verification. The application is held in this status until results are received and processed.
- Energy Efficiency Compliance Milestone Postponement Approved: The Energy Efficiency Compliance Milestone Postponement has been approved. The energy efficiency requirements must be submitted with the Proof of Project Milestone or Incentive Claim Milestone.

#### *Proof of Project Milestone*

- Overdue – Proof of Project Milestone: The Proof of Project Milestone is overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Proof of Project Milestone Submitted: Applicant has entered the required information and uploaded the Proof of Project Milestone documentation for review.
- Proof of Project Milestone Review: Proof of Project Milestone is in queue for review by the program administrator.
- Pending QA – Proof of Project Milestone: The Proof of Project Milestone has been reviewed by the program administrator and is pending quality assurance check.
- Suspended – Proof of Project Milestone: Errors were found during Proof of Project Milestone Review and require corrections by the applicant. The program administrator sent correction information via email from the PowerClerk portal.
- Overdue Corrections – Proof of Project Milestone: The requested corrections for the Proof of Project Milestone are overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Resubmitted – Proof of Project Milestone: The Proof of Project Milestone has been resubmitted with corrections and is in queue for review by the program administrator.
- Proof of Project Milestone Approved: Proof of Project Milestone requirements have been met.



### *Progress Payment Pathway*

- **Overdue Corrections Progress Payment Pathway:** The requested corrections for the Progress Payment Pathway are overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- **Pending IOU Approval – Progress Payment:** The program administrator has completed the application review and is now pending payment approval by the IOU.
- **Pending QA – Progress Payment Pathway:** The Progress Payment Pathway has been reviewed by the program administrator and is pending quality assurance check.
- **Pending Virtual Walk-through:** Program administrator is completing a virtual walk-through. The application is held in this status until results are received and processed.
- **Progress Payment Pathway Approved:** Progress Payment Pathway is in queue for review by the program administrator.
- **Progress Payment Pathway Submitted:** Applicant has entered the information and uploaded progress payment documentation for review.
- **Resubmitted – Progress Payment Pathway:** The application has been reviewed by the IOU and is in queue for review by the program administrator.
- **Resubmitted IOU Approval – Progress Payment:** The application has been reviewed by the IOU and is in queue for review by the program administrator.
- **Suspended – Progress Payment Pathway:** Errors were found during Progress Payment Pathway Review and require corrections by the applicant. The program administrator sent correction information via email from the PowerClerk portal.

### *Incentive Claim Milestone*

- **Overdue – Incentive Claim Package:** The incentive claim is overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- **Incentive Claim Submitted:** Applicant has entered the required information and uploaded the incentive claim documentation for review.
- **Incentive Claim Review:** Incentive claim is in queue for review by the program administrator.
- **Pending QA – Incentive Claim:** The incentive claim has been reviewed by the program administrator and is pending quality assurance check.





- Suspended – Incentive Claim: Errors were found during Incentive Claim Review and require corrections by the applicant. The program administrator sent correction information via email from the PowerClerk portal.
- Overdue Corrections – Incentive Claim: The requested corrections for the incentive claim are overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Resubmitted – Incentive Claim: The incentive claim has been resubmitted with corrections and is in queue for review by the program administrator.
- Pending Inspection: Project has been selected for on-site PV system inspection and an on-site field inspection will be conducted. The application is held in this status until inspection results are received and processed.
- Incentive Claim Approved: Incentive claim requirements have been met and inspection results have been processed (if applicable).
- Pending Payment: The application has been approved for payment. The application is pending payment and the status will change to Incentive Check Mailed status once payment has been issued.
- Incentive Check Mailed: The incentive check has been mailed and should be received by the payee within 30 days of the status date (check date).

#### *Waitlist*

- Waitlist: Applicant has entered the required information and uploaded the Technical Assistance Request Form or reservation request documentation for program administrator review in a fully subscribed program.
- Waitlist: Upfront Technical Assistance Review: The Upfront Technical Assistance Request is in queue for review by the program administrator in a fully subscribed program.
- Waitlist: Pending QA – Upfront Technical Assistance Request: The Upfront Technical Assistance Request has been reviewed by the program administrator and is pending quality assurance check.
- Waitlist: Suspended – Upfront Technical Assistance Request: Waitlisted Upfront Technical Assistance Request is incomplete or requires further action by the applicant. The program administrator sent correction information via email from the PowerClerk portal.
- Waitlist: Overdue – Technical Assistance Request Follow-up: The requested corrections for the Upfront Technical Assistance Request are overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.



- Waitlist: Resubmitted – Upfront Technical Assistance Request: The Upfront Technical Assistance Request has been resubmitted with corrections and is in queue for review by the program administrator in a fully subscribed program.
- Waitlist: Pending Data Request: The Upfront Technical Assistance Request has been reviewed by the program administrator and is in queue to be submitted to the IOU for historical electric usage data at the project site.
- Waitlist: Pending IOU Data: Electric usage data has been requested from the IOU and is pending review by the program administrator in a fully subscribed program.
- Waitlist: Processing IOU Data: The program administrator has received historical electric usage data for the project site from the IOUs and is processing the data.
- Waitlist: Upfront Technical Assistance Request Approved: Program administrator has reviewed and approved the Technical Assistance Request in a fully subscribed program. The project may now submit a Reservation Request Package.

#### *Other statuses*

- Canceled: The application is no longer eligible due to missing a deadline or project requirement. The project can be resubmitted with a new application at the current incentive rate.
- Withdrawn: Host customer or applicant requested that the application be removed and permanently marked with the inactive, withdrawn status. Withdrawn applications are moved to canceled status after 14 days.
- Unsubmitted: Applicant has started the application, but the information is incomplete and not fully submitted.