



2024 Marketing, Education & Outreach Plan





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About the SOMAH Program

The SOMAH Program, launched in July 2019, provides financial incentives for installing solar photovoltaic (PV) energy systems on multifamily affordable housing. SOMAH's goals include:

- Installing 300 megawatts (MW) of solar generating capacity on multifamily affordable housing statewide by 2032.¹
- Expanding access to solar generation and its benefits to customers in multifamily affordable housing, where it is typically limited.
- Providing direct financial benefits to tenants in the form of energy bill credits.
- Promoting local economic development in underserved communities through solar job training opportunities and local hiring.
- Providing greater accessibility to the program through a single point of contact, full-service Technical Assistance and coordination with other low-income programs.

The SOMAH Program is administered by the SOMAH Program Administrator (SOMAH PA),² a team of nonprofit organizations that function as a single entity and provide a host of no-cost services to maximize community benefit and participation. Services include comprehensive Technical Assistance for property owners, tenant education resources and paid job training. An Advisory Council and a Job Training Organization (JTO) Task Force provide input into program development and ensure the program maximizes benefits to the communities it serves. For more detailed information about the program and its requirements, see the [SOMAH Program Handbook](#) and the [Semiannual Progress Report \(SAPR\)](#).

In addition to fostering a robust pipeline of program applications, the marketing, education and outreach (ME&O) strategies outlined in this plan prioritize the participation of [disadvantaged communities](#) (DACs)³ and ensure geographically and demographically diverse participation from SOMAH audiences — solar contractors, property owners and job trainees — while educating and engaging tenants about SOMAH's opportunities and benefits.

¹ As amended by SB 355, previously 2030.

² The SOMAH Program Administrator team comprises the Association for Energy Affordability (AEA), Center for Sustainable Energy (CSE), GRID Alternatives (GRID) and California Housing Partnership Corporation (CHPC) and is supported by subcontracted community-based organizations.

³ Defined as the top 25% most pollution-burdened census tracts within CalEnviroScreen [SB 535 Disadvantaged Communities | OEHA \(ca.gov\)](#).



About the 2024 SOMAH Marketing, Education & Outreach Plan

This ME&O plan will guide 2024 activities by the SOMAH PA team to reach its target audiences and support overall program goals. This plan builds on the activities and learnings from the SOMAH launch and subsequent ME&O plans, with updated strategies to address program gaps, challenges and opportunities.

2023 Marketing, Education and Outreach in Review

In 2023, the SOMAH PA continued its outreach and marketing efforts through new and expanded activities such as online webinars; email marketing; wellness calls to help participants navigate and complete program requirements and to share key program updates including SOMAH's incentive increase and updated incentive structure (D. 23-03-007); direct outreach to owners of potentially eligible properties with the support of SOMAH's community-based organization (CBO) partners; and a workforce development needs assessment for contractors to better understand hiring, training and workforce development needs from SOMAH-eligible solar contractors ([see 2024 Goal 3 Section for more information](#)). In-person engagements were also conducted by the SOMAH PA and its CBO partners, including Tenant Education Training workshops and surveys ([see 2024 Goal 4 Section for more information](#)) and ribbon-cuttings celebrating completed SOMAH projects, which engage multiple audiences through attendance by property/developer staff, contractor staff, government stakeholders job trainees, and residents. These types of events help the PA and its partners share about their organization's partnership with SOMAH and learn about participants' experiences with the program. This information has been used to inform messaging and develop marketing collateral, including success stories and blog articles. In addition, the SOMAH PA's participation in panels for partner webinars and conferences, such as the [2023 San Diego Green Building Council webinar](#) and the [2023 California Climate & Energy Forum in Santa Rosa](#), helped expand SOMAH's outreach and opportunities to co-market.

The SOMAH PA also continued to pursue opportunities to reach underrepresented populations such as engaging Tribal governments to better understand how to support increased enrollment of Tribal projects in the program. With CBO partnerships added in gap regions identified in previous years, the PA also sought to leverage regional and local government stakeholder networks and investor-owned utilities (IOUs) to co-market the program. One of these efforts resulted in a new co-marketing relationship with Orange County Power Authority, which was facilitated by SOMAH's CBO partner OC



Goes Solar (OCGS). The SOMAH PA understands the value and impact of these relationships in increasing awareness of the SOMAH Program and in providing credibility through partnerships with trusted entities administering related programs. These partnerships are crucial in the development and dissemination of marketing collateral to share SOMAH's impact and success to potential applicants (property owners and contractors) and affordable housing communities across California.

Key highlights from 2023 include:

- **First Completed Tribal Project Funded by SOMAH**
In August, the Bishop Paiute Tribe, GRID Alternatives Inland Empire (IE) office and the SOMAH PA celebrated the installation of a **49-kW DC** solar system at [Coyote Mountain Apartments](#). The **24-unit** property is the first SOMAH Program incentivized installation to be completed within a Tribal reservation in California. The ribbon-cutting event was attended by Tribal members and leadership, program participants, Southern California Edison representatives, California Public Utilities Commission (CPUC) Commissioner John Reynolds, and Christina Snider, Tribal Affairs Secretary to Governor Gavin Newsom. To learn more about this project watch [here](#). In addition to the ceremony, the SOMAH PA and CBO partner California Environmental Justice Alliance (CEJA) facilitated two continued tenant education workshops for the location (**see 2024 Goal 4 section for more details**).
- **Celebrations of 1,550 kW in SOMAH Projects**
During the year, the SOMAH PA and its partners attended three additional ribbon-cutting celebrations marking completion of projects in the cities of Carlsbad, Sanger and Orange, co-led by project contractor Sunrun. The [Villa Loma Apartments](#) in Carlsbad celebrated a **780.04-kW DC** solar system that will help **344** families save an estimated **\$60⁴** per month on energy bills. The ceremony was attended by property owner BRIDGE Housing, Congressman Mike Levin, residents and SOMAH's CBO partner CEJA. The [Memorial Village](#) project in Sanger recognized the completion of a **123.8-kW CEC-AC** solar system that will help **48** households save an estimated **\$70⁵** per month on energy bills. The ceremony was attended by property owner Fresno Housing, Mayor of Sanger Frank Gonzalez, residents, Fresno District 4 Supervisor Buddy Mendes and SOMAH PA partners Self Help Enterprises (SHE) and Proteus. In Orange, at The Knolls, SOMAH PA CBO partner OC Goes Solar attended a ribbon-cutting ceremony hosted by co-owners BLDG Partners and The Foundation for Affordable Housing along with Sunrun. The **646-kW** system will serve **260** tenant units and save residents approximately **\$60⁶** per month on energy bills.
- **Growth in Annual Web Traffic**
In October 2022, SOMAH launched its new website offering an easier user experience with clearer messaging, cleaner design and new resources to navigate the application process and spur participation. By incorporating interactive

⁴ [Sunrun Partners with BRIDGE Housing to Provide Energy Equity to Residents in Multifamily Complex in Southern California: Sunrun Inc. \(RUN\).](#)

⁵ [Sunrun Partners With Fresno Housing To Create Solar Installation For Renters: Sunrun Inc. \(RUN\).](#)

⁶ [https://investors.sunrun.com/news-events/press-releases/detail/299/sunrun-provides-affordable-housing-community-with-clean.](https://investors.sunrun.com/news-events/press-releases/detail/299/sunrun-provides-affordable-housing-community-with-clean)

functionality and single call-to-action (CTA) buttons on audience pages, CalSOMAH.org realized a **24%** increase in page views from 2022, **11%** increase in new users, **15%** increase in time for page/sessions and **40+** multifamily property owner leads.⁷

- **Growth in Social Media Followers**

SOMAH's social media followers increased from **583** to **803** as of November 7, 2023, across LinkedIn, Twitter, Facebook and Instagram. This represents an **increase of 37.7%** from 2022.

- **New Applications**

As of November 30, 2023, the SOMAH Program saw **123** new applications⁸ representing over **13 MW** of solar, of which over **3 MW** is allocated for projects in DACs. These new projects add to the **108** projects that have been completed and paid, with **98** more nearing completion.

Property Market Analysis & Program Participation

In 2023, the SOMAH PA conducted comprehensive research on the multifamily affordable housing market, building upon earlier analyses conducted by the California Housing Partnership Corporation (CHPC). This research, combined with the PA's audience-specific expertise, plays a crucial role in shaping ME&O strategies. Despite the changes mandated by passage of California Senate Bill (SB) 355, the market assessment data currently considers only properties that align with SOMAH's existing eligibility criteria. Once the new eligibility requirements outlined in SB 355 are ready for implementation, the SOMAH PA intends to broaden the market assessment to encompass a wider range of properties now meeting the updated criteria. To develop targeted marketing and outreach strategies, this analysis was expanded to regions with high concentrations of SOMAH-eligible DAC properties. Additionally, this research focused on underserved geographic regions and provided insights on specific historically underserved subpopulations, including tribal entities and rural housing properties. The 2023 market research also included an analysis of the Low-Income Housing Tax Credit (LIHTC) program, with information on the current number of existing SOMAH-eligible LIHTC properties.

⁷ Between Jan. 1 - Nov. 7, 2023, most visited pages were: 1) the [SOMAH homepage](#) – 7,589 visitors, 2) the [About page](#) – 2,464 visitors, 3) the Property owner [program overview & requirements](#) page – 1,670 visitors, 4) the [property owner landing page](#) from the paid media campaign – 1,321 visitors.

⁸ As of November 30, 2023, 11 new applications were canceled or withdrawn.



SOMAH Eligible Properties Map

The SOMAH PA continues to use the California Housing Partnership's preservation database to create and maintain the SOMAH [Eligible Properties Map](#) – an interactive tool that allows users to search for potentially eligible properties across the state. It includes features such as the number of affordable housing units per property, if the property is located in a DAC and street address. The PA updates the map quarterly to include the status of a property's enrollment in the SOMAH Program (i.e., SOMAH enrolled vs. non-SOMAH enrolled) to ensure the map serves as a lead generation tool for contractors and stakeholders. Given the pending changes outlined in SB 355, the PA intends to update the data to include potentially eligible new construction and higher-income properties (66% of units at or below 80% average median income) once programmatic updates are ready to be implemented.

Analysis of Potentially SOMAH-Eligible Properties

Analysis of the CHPC's Affordable Housing Preservation Database reveals there are approximately **4,328** properties potentially eligible for SOMAH and meet the following program requirements: 5+ units, 10+ years remaining on deed restriction, IOU or community choice aggregator (CCA) customer, and either meets affordability requirements or is located in a DAC. The potentially SOMAH-eligible database does not exclude master metered properties or properties that have used the Multifamily Affordable Solar Housing Program or installed solar through other programs such as the Low-Income Weatherization Program (LIWP). As such, properties included in this database are considered "potentially eligible" as a full eligibility review with a submitted SOMAH application is necessary to confirm criteria are satisfied.

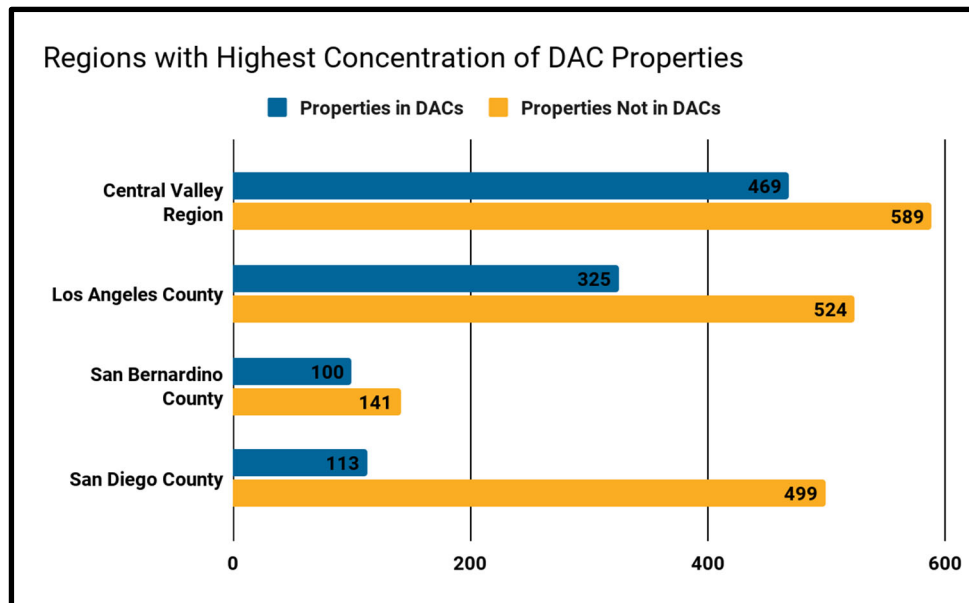
Among the properties that could qualify for SOMAH, the majority are situated within the Pacific Gas and Electric (PG&E), Southern California Edison (SCE) and San Diego Gas & Electric (SDG&E) service territories.

Properties in DACs and High-Priority Regions

Approximately **35% (1,529)** of all potentially SOMAH-eligible properties are located in DACs as defined by CalEnviroScreen. The Central Valley has the highest concentration of potentially SOMAH-eligible DAC properties, **79.6% (469)**. Other regions of focus with high concentrations of DAC properties include Los Angeles, San Diego and San Bernardino counties. As the SOMAH PA continues to develop outreach strategies to boost program participation in DACs, the Central Valley region⁹ remains a high priority.

⁹ SOMAH's definition of Central Valley includes the following counties: Fresno, Kern, Kings, San Joaquin, Tulare, Stanislaus, Madera and Merced.

Figure 1: Regions with Highest Concentration of Properties in DACs

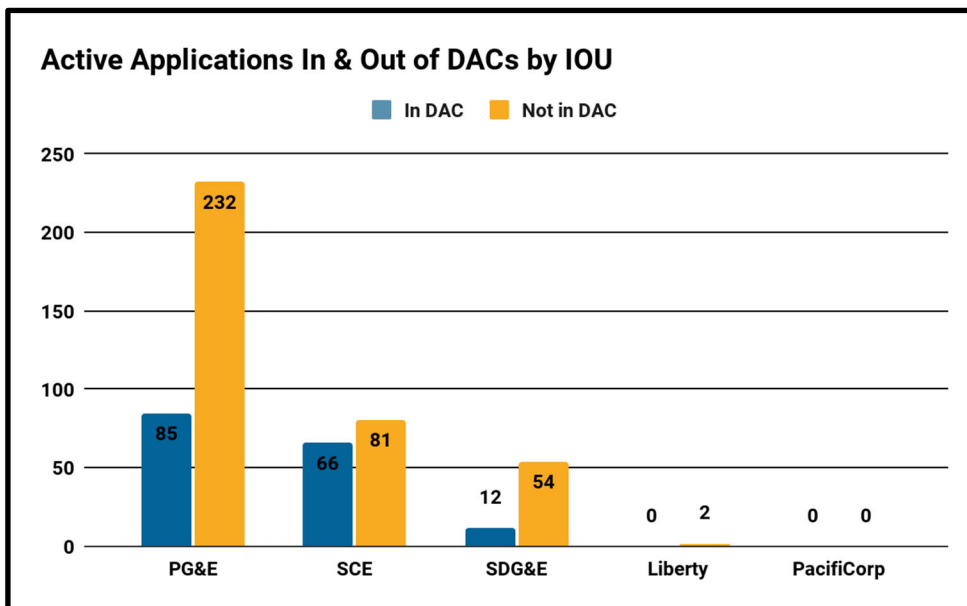
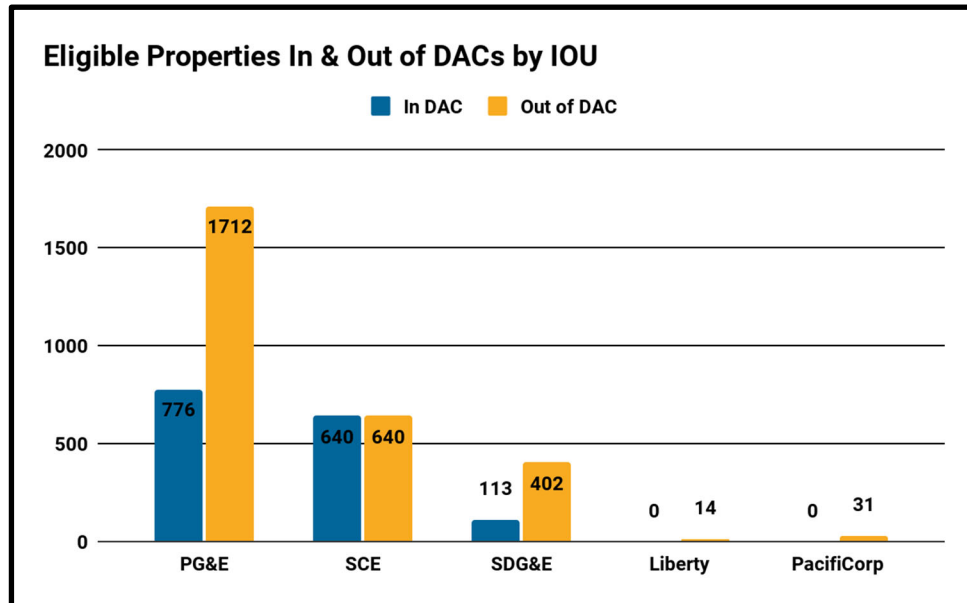


In 2022, the California Environmental Protection Agency (CalEPA) expanded its formal designation of DACs to include lands under the control of federally recognized Native American Tribes. SB 355 also expands program eligibility requirements to include an explicit pathway for CA Native Tribes to participate in the program. As a result of these developments, it is now easier for up to 109 federally recognized Tribes in California to apply for SOMAH incentives. Moving forward, the SOMAH PA will continue to gather data on Tribal multifamily affordable housing stock throughout the state, such as monitoring the California Department of Housing and Community Development's housing pipeline, to inform direct outreach strategies around engaging Tribal entities.

Analysis of Active SOMAH Applications

As of November 30, 2023, there are **(532) active SOMAH applications**. Among the active SOMAH applications, approximately **31% (163)** are for properties in DACs, which is just below the **35%** overall share of potentially eligible properties in DACs. Analysis of active SOMAH applications shows that, on average, each IOU's share of applications is roughly proportional to their overall share of potentially eligible properties in DACs. However, recognizing the potential for further impact, the SOMAH PA is proactively planning to enhance outreach efforts specifically aimed at increasing enrollment across SCE and SDG&E for DAC properties. This initiative aims to surpass mere alignment with averages, ensuring a targeted and amplified approach to maximize participation for underserved communities.

Figure 2: Comparison of SOMAH-Eligible Properties and Active Applications In & Out of DACs by IOU¹⁰



¹⁰ Figure 2 defines 'eligible properties' as those that are deed restricted multifamily family buildings with at least 5 units, existing buildings, individually metered, have at least 80% of residents with incomes at or below the area median income or be located in a CalEnviroScreen disadvantaged community, and are located within an investor-owned utility territory. Figure 2 does not include properties that may become eligible through the changes put forth in SB 355.

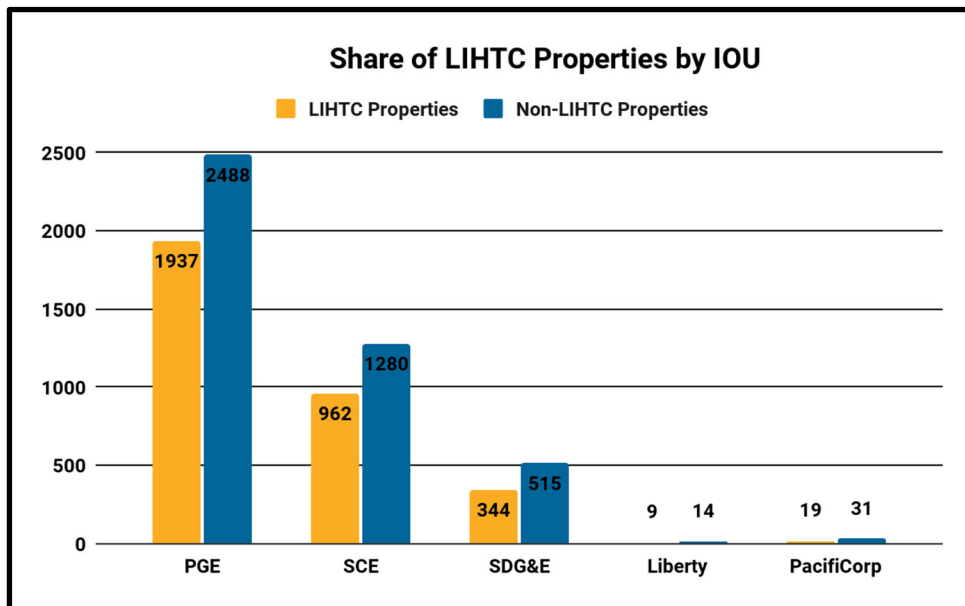
Building a Long-Term SOMAH Pipeline

The Low-Income Housing Tax Credit (LIHTC) is one of the state's largest funding sources for affordable housing development. Approximately **75% (3,271)** of potentially SOMAH-eligible properties are financed through the LIHTC program. As such, the LIHTC program serves as a great pipeline of potentially eligible properties for the SOMAH Program. Of the total LIHTC properties, **1,795** properties are leveraging financing in addition to LIHTC from additional affordable housing agencies, including U.S. Department of Housing and Urban Development (HUD), California Department of Housing and Community Development (HCD), U.S. Department of Agriculture (USDA) and California Housing Finance Agency (CalHFA). Co-leveraging multiple financing sources may increase the likelihood of qualifying for SOMAH due to the availability of multiple regulatory agreements.

Historically, LIHTC developments have been the most straightforward to qualify for the program, as the income and affordability term requirements align with those of SOMAH.

Looking ahead, as the SOMAH PA begins to implement SB 355 changes, it is anticipated that qualifying developments utilizing funding from agencies like HCD, HUD and local sources will become easier. This is because affordable housing programs facilitated by these agencies often feature less stringent income requirements. Initiating a marketing campaign is crucial to reach out to new property owners who may be unaware of SOMAH, as well as those who were previously ineligible but may now meet the updated requirements. Elevating awareness about the revised eligibility criteria is crucial in ensuring the inclusion of property owners who many have originally been turned away.

Figure 3: Share of LIHTC Properties



The SOMAH PA will continue to develop relationships with state, federal and local affordable housing financing agencies to stay up to date on the development of new affordable housing projects that might be eligible to enroll in SOMAH. Examples of new programs include the California Department of Housing and Community Development (HCD) Homekey Program, which offers funds to convert former hotels and motels into long-term temporary and permanent supportive housing. The Homekey Program has [awarded funding](#) for **116** affordable housing projects, including six Tribal projects. Additional programs of interest include the [Affordable Housing and Sustainable Communities \(AHSC\) Program](#), the Tribal Housing Grant Program (in development) and the [Transformative Climate Communities Program](#). In addition, the SOMAH PA will continue to work with HCD, as they are prioritizing Tribal inclusion in their programs, to develop an informal referral system for Tribal housing projects in development to learn more about SOMAH's offerings. Developing these relationships will help to achieve Goal 1 of the ME&O plan, by creating a pipeline of diverse projects through the engagement of a multitude of property owners.

The SOMAH Program will use the 2025 market research to improve identifying and messaging to underserved and priority communities, including those in DACs, Tribal housing and public housing authorities. To better understand the remaining gaps in the SOMAH Program pipeline, the 2025 market analysis will aim to include:

- Further research and analysis of funding programs that serve underserved communities including the Indian Housing Block Grant, Homekey and others.
- Continued research of public housing authorities and Tribal housing entities to identify those with development team capacity and thus more likely to be able to participate.
- Research and analysis on the profiles of available housing stock for non-SOMAH participating affordable housing properties in California.
- Continued DAC analysis — including working to develop categories for property owner types in DACs for more targeted outreach, and deeper analysis of major funding sources for DAC properties to draw insight on improved strategies for outreach to property owners in DACs.

2024 Overarching Priorities, Marketing Strategy, Goals & Objectives

The SOMAH Program's ME&O priorities, goals and objectives focus on outreach to increase SOMAH applications that 1) ensure the state's most under-resourced



communities are meaningfully engaged and able to access SOMAH's benefits, 2) center on equity and community benefits and 3) prioritize strategic partnerships with groups already working with SOMAH's intended audiences. The SOMAH PA's 2024 ME&O plan will continue to focus on building the program's pipeline of property owners and contractors, increasing SOMAH applications through its Technical Assistance services, hosting ongoing audience- and program-specific webinars, and developing and disseminating materials tailored for various audiences. Through this work, the PA is committed to ensuring program changes, including updated eligibility made possible through the passing of SB 355, will be clearly communicated to participants.

SOMAH's 2024 and Long-Term Overarching Priorities

- *Prioritizing DACs and Ensuring Community Benefits*

Low-income affordable housing residents, especially working-class families of color, have a high energy burden and have historically lacked access to clean energy solutions while living in some of the state's most pollution-burdened neighborhoods. DACs are not just low-income communities — they are environmental justice communities that experience environmental racism through the disproportionate burden of multiple sources of pollution. CalEPA has designated tribal housing as a DAC, which expanded SOMAH eligibility to include properties on lands under control of federally recognized Native American tribes.¹¹

- *Recruiting and Retaining Property Owners and Contractors*

SOMAH's no-cost [Technical Assistance \(TA\) and Support Services](#) are key to increasing overall program participation as well as expanding participant diversity. Additionally, the SOMAH PA will focus on working more closely with participants who manage larger portfolios of affordable multifamily properties. These services provide start-to-finish support for property owners and contractors and help tenants and job seekers access and use program benefits. The SOMAH PA will incorporate a variety of ME&O tactics to offer and promote these services to SOMAH audiences, including developing and disseminating success stories and case studies (**see 2024 Goals 1-5 activities section for more details**).

- *Creating Accessible Programming*

The SOMAH PA values the importance of balancing remote versus in-person engagement, with consideration to accessibility, audience feedback, cost-effectiveness, "return on investment" and health and safety. The SOMAH PA plans to employ a mixture of ME&O activities online, remote and in-person, always prioritizing the health and safety of the SOMAH PA and community members.

- *Collaborating with Strategic Partners*

SOMAH is a large, multifaceted program that requires educating and engaging different audiences to achieve diverse participation. To do this successfully, the SOMAH PA relies on partnerships with CBOs, job training organizations (JTOs), as well as co-marketing collaborations with IOUs, affordable housing associations and local/regional/state government entities. The goals of these efforts are to expand

¹¹ As seen in Figure 2 "Eligible Properties In & Out of DACs by IOU", PG&E and SCE service territories have higher numbers of DAC properties. Therefore, outreach in these service territories will be higher.



SOMAH's reach and build credibility with and accountability to the communities SOMAH serves. The SOMAH PA continues to partner with 8 CBOs across California: Asian Pacific Environmental Network (APEN), California Environmental Justice Alliance (CEJA), Communities for a Better Environment (CBE), Community Environmental Council (CEC), Environmental Health Coalition (EHC), Self-Help Enterprises (SHE), OC Goes Solar (OCGS), and The Niles Foundation (TNF). These CBOs support property owner outreach, tenant education, workforce development, and local government outreach for comarketing. **Figures 4 and 5** (see below) show the variation between where potentially eligible SOMAH properties lie within CBO organizing areas in comparison to the active applications of the current pipeline.

Figure 4: Overlay of CBO Organizing Areas and Reach, JTO Locations and SOMAH-Eligible Properties & IOU Territories

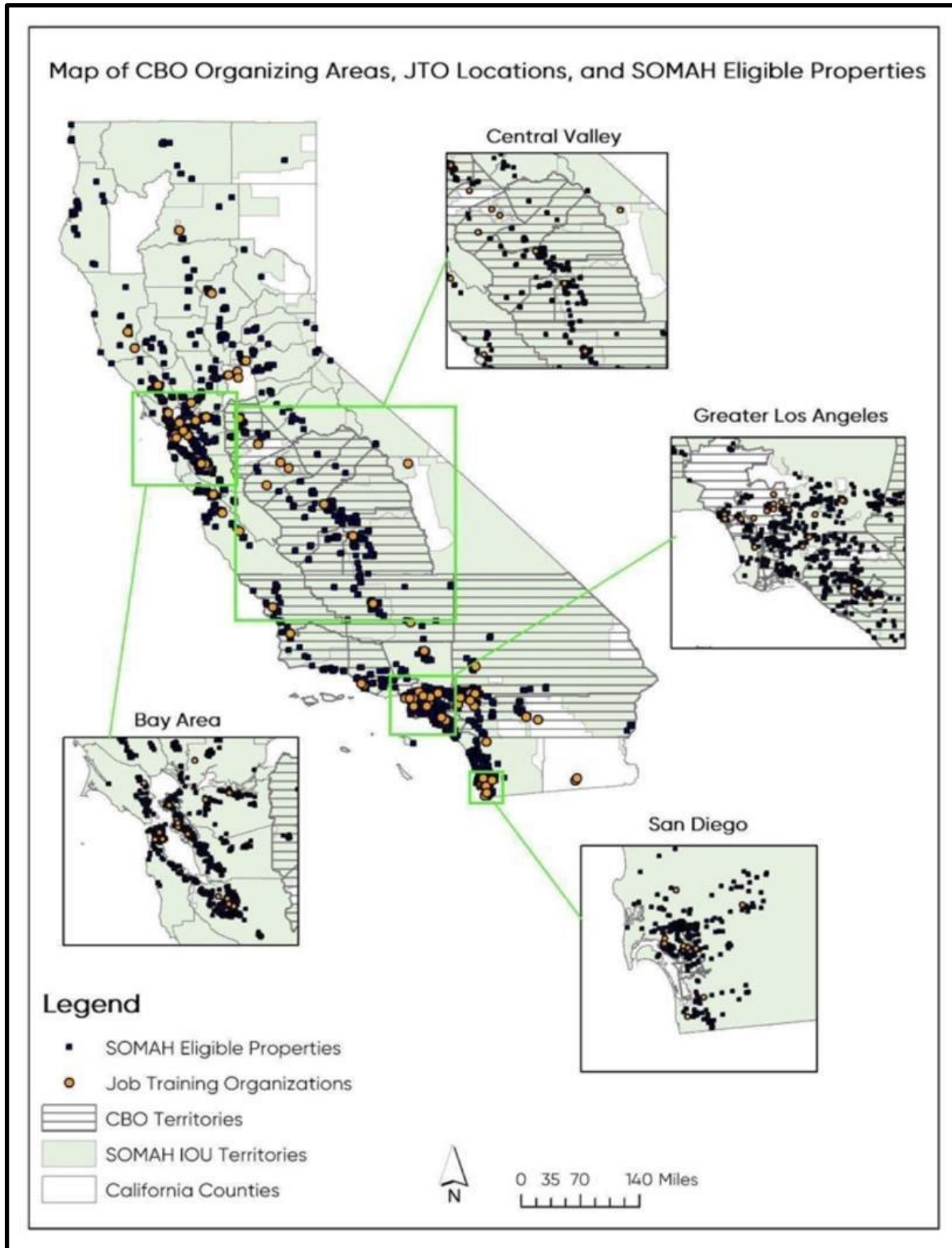
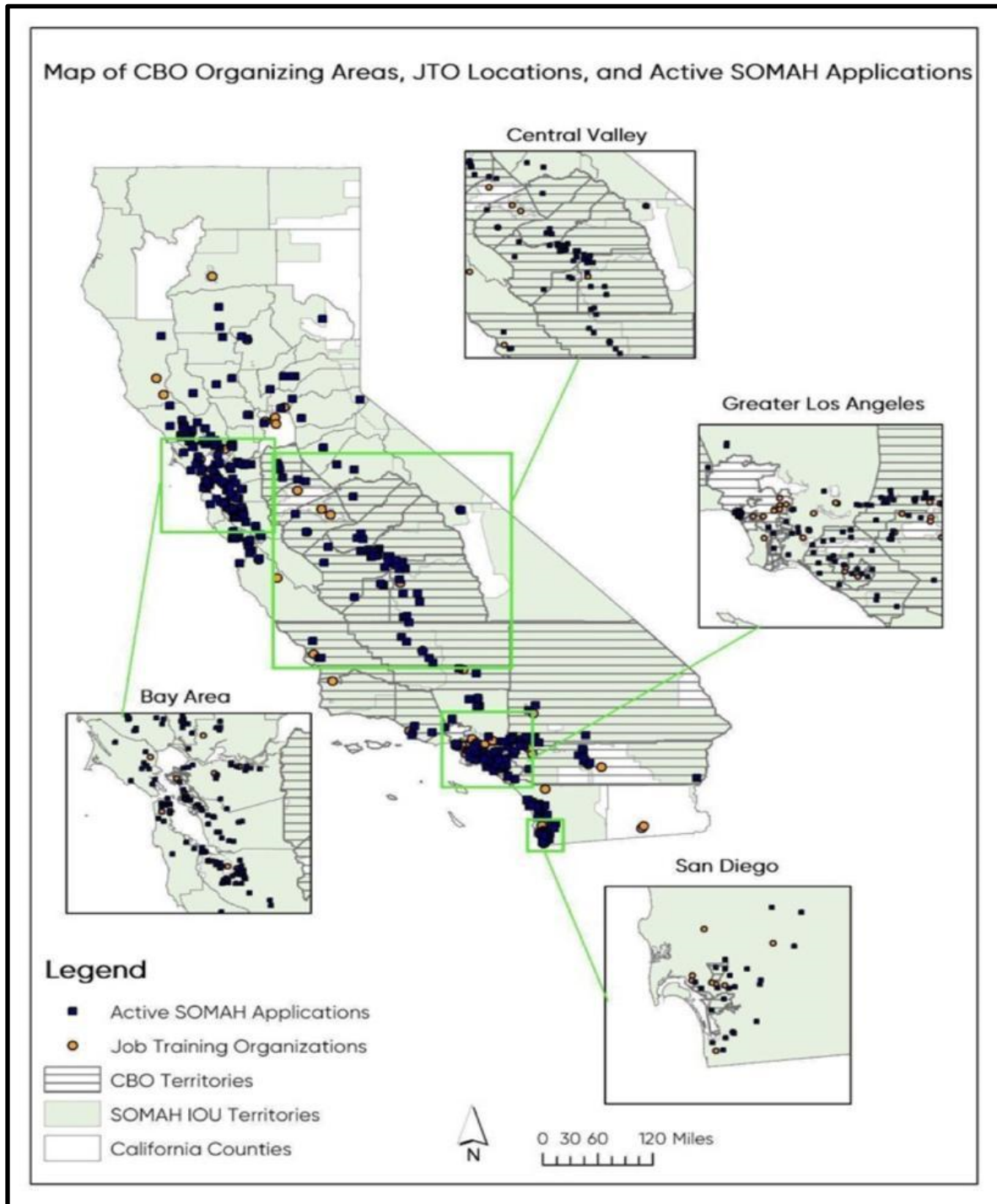


Figure 5: Overlay of CBO Organizing Areas and Reach, JTO Locations, SOMAH Applications and SOMAH-Eligible IOU Territories¹²



¹² for completed projects view [2024 January SAPR](#) and [Eligible Properties Map](#)

SOMAH's 2024 Marketing Strategy

The SOMAH PA maintains ongoing efforts to engage contractors, multifamily affordable housing property owners, tenants, JTOs, job trainees and various stakeholders (regional and local government agencies, elected officials, IOUs and CCAs) with vested interest in SOMAH's outcomes. This marketing strategy considers factors such as audience (including segmented audiences within larger audience categories), location (e.g., Tribal communities, DACs, and utility territories), language, accessibility and specific campaign goals (e.g., increasing general awareness, driving attendance to specific events and/or increasing participation in specific program areas).

While the PA contends it may not be able to celebrate every project with a ribbon cutting, success story, or case study, there are still additional perspectives that the PA intends to share to expand the reach of the program and ensure its goals around equity and accessibility are achieved.

The bullets below are a high-level summary of the key strategies the PA will use in 2024, building on lessons learned from outreach and activities in previous program years.

- *Narrative Based Content*
 - Continue development of narrative based content (success stories, blogs, articles, etc.) These efforts are timely, relevant, and intended to highlight the diversity of projects and participants' experiences and ultimately encourage other eligible properties to enroll in the program.

Including the following projects:

- New construction and upfront payment (pending Commission direction from SB 355)
- Subcontractors
- Diverse contractor and property ownership type
- Regions with consideration to CBO areas and/or previously not highlighted
- Public Housing Authority (PHA)
- Projects leveraging ITC adders
- Liberty and PacifiCorp projects
- Job trainees
 - tenants
 - justice impacted

- *Direct Outreach*
 - Organize and execute both in-person and digital events to speak directly with impacted community members, particularly those living or working in DAC areas.

This includes:

- On-site events (e.g., ribbon cuttings¹³ceremonies, tenant education workshops)
- Webinars (i.e., workshops, presentations and audience-specific trainings)
- Trade and community conferences
- *Website Updates*
 - Continue updating the website by adding educational and informational resources and unique and credible testimonials to keep audience members engaged and interested in the program.
- *Paid Media*
 - Leverage paid media for education, awareness and lead generation. This includes:
 - Online/mobile:
 - Google search keyword ads
 - Exploration of various online display ad platforms to reach Tribal audiences
- *Organic Social Media*
 - The SOMAH PA has a social media presence on LinkedIn, X (formerly Twitter), Facebook and Instagram. The 2024 organic social media will include the following:
 - Maintain up-to-date platforms with latest events and content updates.
 - Strengthen social media partnerships with IOUs and other stakeholders.
 - Continue to leverage industry-related hashtags and topics to increase general program awareness.
 - Continue to add and follow relevant organizations on social media channels, including tribal groups, CBOs, affordable housing organizations, energy efficiency programs, government organizations, etc.
- *Earned Media*
 - Leverage local and trade media to raise awareness of the program with prospective applicants and allies.
 - Press releases and press conferences: Use project launches, completions and milestones to create media opportunities featuring partners, CBOs and impacted community members.
 - Story pitching: Regularly pitch local success stories to local press, including print publications and television stations with particular focus in gap regions and DACs.

¹³ Within the coming year the SOMAH PA has forecasted on partnering with one completed project per quarter to lead a ribbon cutting. This is not inclusive of ribbon cuttings that the SOMAH PA is invited to but not a part of hosting.

- *Email Marketing*
 - Continued use of the resource library to develop multiple email marketing nurture campaigns for property owners and contractors.
 - An email marketing campaign for tribal audiences.

SOMAH's 2024 ME&O Goals

1. **Goal 1:** Engage property owners to build and maintain a multiyear pipeline of diverse projects.
2. **Goal 2:** Retain a robust and diverse contractor base and support eligible contractor participation with new application submissions.
3. **Goal 3:** Ensure sufficient job trainee participation and preparation for SOMAH job training opportunities or relevant careers.
4. **Goal 4:** Educate SOMAH-eligible tenants and tenants living in participating SOMAH properties about the program and how to maximize their benefits.
5. **Goal 5:** Ensure stakeholders are informed and actively co-marketing the program.

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

Overview

The introduction of increased incentive rates and elimination of the annual incentive step-down in the beginning of 2023 have helped the program's capacity to enroll additional applications in 2023 compared to previous years. As of November 30, 2023, a total of **532** applications were submitted that will benefit **39,221** tenants across the state. Of the applications submitted in 2023, over **30%** are taking advantage of SOMAH's Technical Assistance and Support Services to assist their projects. While SOMAH has observed an increase in new applications, the program recognizes the need for a greater influx of applications to achieve its goal of installing 300 MW of solar capacity.

Property Owner Outreach

By November 30, 2023, the SOMAH PA conducted outreach to a total of **330** affordable housing organizations across the state. Within this extensive outreach effort, the PA made connections with **12** housing authorities and **119** Tribal entities, including Tribal housing authorities. To expand the program's marketing reach and bolster awareness, the SOMAH PA continued a property owner email nurture campaign coupled with strategic paid advertising. These initiatives helped to secure **83** new SOMAH email subscribers by November 30.



Additionally, the PA supported property owner webinars designed to foster program awareness and adoption and build the expertise of affordable housing staff. These informative sessions included:

- Incentives for Financing Clean Energy in Multifamily Affordable Housing (March 15, 2023)
 - 29 attendees
- SOMAH Program and Technical Assistance Services Overview (April 11, 2023)
 - 7 attendees
- Accelerating Electrification with Solar Energy for Multifamily Housing (September 27, 2023)
 - 75 attendees
- Climate Action Campaign Webinar (October 5, 2023)
 - 42 attended

Furthermore, the SOMAH PA attended two significant affordable housing conferences in 2023: *Housing California* and the *Southern California Association for Non-Profit Housing (SCANPH)* conference. These events provided valuable platforms for networking, sharing insights from program implementation and promoting the SOMAH Program to a wider audience of housing professionals and stakeholders. The SCANPH conference provided an opportunity to connect with property owners representing regions with low SOMAH enrollment including Los Angeles County, the Inland Empire, and Orange County.

SOMAH's second Triennial Third-Party Evaluation report in 2023 provided several recommendations to enhance the program's efforts in establishing a pipeline of multiyear projects. These recommendations include:

- Engaging in direct outreach to property owners and regularly updating SOMAH's Salesforce database to ensure accurate contact information.
- Actively participating in events where property owners are involved.
- Offering support to property owners who have host customer-owned systems to prevent application cancellations.
- Collaborating with funding sources like Fannie Mae to facilitate the smooth participation of applicants and overcome any obstacles within the SOMAH Program.

The SOMAH PA is committed to prioritizing these suggestions by concentrating on creating meaningful opportunities for direct outreach with property owners and continuing to provide Technical Assistance and Support Services to both prospective and enrolled applicants.

Challenges and Lessons Learned

Although the program has advanced considerably, there are still challenges in enrolling new applications. For instance, out of the **98** eligibility prescreen submissions received in 2023, **47** projects met SOMAH's eligibility criteria, leaving a gap in the conversion of engagement to new applications. The remaining **51** applications did not qualify for the program for various reasons, such as the developments being new construction, master metered or lacking active regulatory agreements that meet SOMAH's eligibility requirements.¹⁴ The SOMAH PA plans to revisit ineligible projects that may now be eligible as a result of SB355.

The SOMAH PA contacted **119** Tribes and Tribal housing authorities throughout California. Preliminary discussions have started between SOMAH and **three** Tribes that have not participated in SOMAH previously. In Q4 2023, SOMAH was placed on one Tribal Council meeting agenda to be introduced to council members. The PA continues research in eligibility pathways for Tribes. Early findings reveal that very few Tribes in the state currently possess qualified multifamily affordable housing that aligns with SOMAH's criteria. Historically, Tribes have faced various obstacles when participating in multifamily affordable housing programs, including competitive funding applications that do not consider Tribal timelines and/or sovereignty and multifamily housing programs not offering enough long-term support for property management. Due to the limited number of eligible projects available for enrollment, the SOMAH PA has concentrated on identifying these barriers and formulating an appropriate marketing strategy for engaging with Tribes. To better prepare for future outreach to Tribes, the SOMAH PA has undertaken the following initiatives:

- Participated in a second Tribal training session with two Advisory Council members to gain deeper insights into Tribal housing and effective outreach tactics.
- Co-hosted a ribbon-cutting event with the Bishop Paiute Tribe to establish community relationships, gather essential materials such as photos, videos and interviews and develop a comprehensive case study of the Tribal project.
- Produced Tribal-specific marketing materials to provide better support for engaging Tribal projects to enroll in SOMAH.
- Collaborated with additional clean energy programs, such as Disadvantaged Communities Single-family Solar Homes (DAC-SASH) and the Tribal Grant Solar Accelerator Fund, to explore opportunities for partnerships, referrals and co-marketing efforts to ensure mutual success.
- Conducted direct outreach calls and emails to 108 federally recognized Tribes in California.

¹⁴ See [SOMAH Program Handbook Section 2.2.1](#)



These efforts demonstrate the SOMAH PA's commitment to addressing the unique challenges faced by Tribal housing authorities and fostering productive collaborations to ensure solar can be more easily accessed by Tribes.

Proposed Program Changes

SB 355 offers the potential to expand the pool of affordable housing properties eligible to participate in SOMAH. SB 355 creates a pathway for new construction, expands the definition of eligible properties to include mobile home parks, adjusts the income level requirement to participate in the program and introduces an advanced payment option. Furthermore, SB 355 outlines explicit participation pathways for Tribes and public housing authorities. With this legislation enacted, there is an opportunity to co-leverage SOMAH with vital statewide electrification initiatives such as the Building Initiative for Low-Emissions Development (BUILD) and Low-Income Weatherization Program (LIWP is enhanced due to the expanded and aligned eligibility requirements). With these changes, SOMAH is optimistic that the volume of applications will continue to increase in 2024 and beyond.

Priorities and Key Strategies for Property Owners

- Increase program enrollment and simplify the application process, where possible.
- Promote the changes put forth in SB 355: updated income eligibility, new construction eligibility, "properties" (rather than "buildings") owned by tribes and public housing authorities and advanced payment options.
- Prioritize outreach to property owners with DAC-located properties.
- Identify barriers to participation and increase program enrollment for tribal entities.
- Increase awareness and use of SOMAH's Technical Assistance (TA) and Support Services.
- Co-market with the Investor-Owned Utilities including Liberty and PacifiCorp to better target potentially eligible projects within the territories.
- Participate in affordable housing events and conferences that serve property owners in areas with low-SOMAH participation such as Los Angeles, the Central Valley, and San Diego.

SMARTIE Objective(s): All to be achieved by November 2024

1. Conduct direct outreach to at least 200 affordable housing organizations, including at least 20 public housing authorities. Outreach will prioritize property owners in DACs and targeted communities, such as the Central Valley, Liberty and PacifiCorp utility territories. Relevant activities will be conducted by the SOMAH PA as well as its CBOs and other co-marketing partners.
2. Conduct outreach to 180 tribes listed on the Native American Contact list maintained by the Native American Heritage Commission and foster

relationships with at least 10 tribal entities with potentially eligible multifamily affordable housing properties.

3. Follow up with all property owners, property managers and Tribal members who fill out Check Eligibility Form or subscribe to the email listserv.
4. Present on SOMAH at a minimum of three webinars/panels for property owners and public housing authorities with a minimum of 10 registrants at each, with a prioritization on attendance for property owners with properties in DACs or in other priority regions.
5. Build relationships with at least four new property owner co-marketing partners in application gap regions, such as the Central Valley, Los Angeles, Inland Empire, San Diego, rural housing (especially PacifiCorp and Liberty territories) and tribal housing entities.
6. Have a presence at key statewide and regional affordable housing conferences by participating in two to four conferences with property owners representing priority regions and/or groups such as Southern California, the Central Valley, rural areas including Liberty and PacifiCorp, and tribes.



2024 Audiences and Main KPIs (key performance indicators)

Audiences

- Affordable housing owners, including:
 - Non-profits
 - For-profits
 - Faith-based housing
 - Rural housing
 - Farmworker housing
- Tribal housing entities
- Property management companies
- Public housing authorities (PHAs)
- Property owners not subscribed to the SOMAH email list
- Property owners subscribed to the SOMAH email list
- Affordable housing associations including:
 - Housing California (HCA)
 - Non-Profit Housing Association of Northern California (NPH)
 - Southern California Association for Non-Profit Housing (SCANPH)
 - San Diego Housing Federation (SDHF)
 - California Coalition for Rural Housing (CCRH)
 - San Joaquin Valley Housing Coalition (SJVHC)
 - Kennedy Commission
 - California Association for Housing Authorities (CAHA)
- State and federal housing finance agencies such as:
 - Tax Credit Allocation Committee (TCAC)
 - California Department of Housing and Community Development (HCD)

Main KPIs

- Number of new applications
- Number of new DAC (including Tribal) applications
- Number of new email subscribers
- Number of email subscribers open rates
- Number of new interest calls
- Number of webinars and attendees
- Number of organizations contacted
- Number of diverse property owner types contacted (housing authorities, Tribal housing entities, etc.)
- Number of website visits from paid media campaigns
- Number of projects requesting or using SOMAH Technical Assistance and Support Services

<ul style="list-style-type: none"> ● <i>Co-marketing partners including:</i> <ul style="list-style-type: none"> ○ <i>Clean energy program implementers</i> ○ <i>Utility Single Point of Contacts (SPOCs)</i> ○ <i>Groups serving priority populations (i.e. Central Valley, rural housing, tribes, etc.)</i> 	
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Activities

No.	Activity	Channels/tools	Audience	Duration
1.1	Identify and conduct outreach to diverse property owner organizations and property management companies, especially in underrepresented regions and utility territories.	<ul style="list-style-type: none"> ● Salesforce ● Direct outreach ● Conferences ● CBOs ● LIHTC application data ● Program referrals ● Check Eligibility Form ● Eligibility Prescreen Form 	<ul style="list-style-type: none"> ● Nonprofit property owners ● For-profit property owners ● Housing authorities ● Tribal entities ● Management companies 	<ul style="list-style-type: none"> ● Q1-Q4 2024 ● Monthly
1.2	Continue to engage property owners and applicants with canceled/withdrawn applications to encourage application re-enrollment or identify other candidates for SOMAH in their portfolio.	<ul style="list-style-type: none"> ● PowerClerk ● Direct outreach 	<ul style="list-style-type: none"> ● Property owners ● Solar contractors 	<ul style="list-style-type: none"> ● Q1-Q4 2024 ● Monthly
1.3	Identify additional contact database sources containing affordable housing property data and scrub existing property data to better distinguish for-profit and nonprofit properties.	<ul style="list-style-type: none"> ● Affordable housing agency data including but not limited to: ● HCD ● Local city and county records ● Affordable housing 	<ul style="list-style-type: none"> ● Property owners 	<ul style="list-style-type: none"> ● Q2, Q4 2024 ● Biannually

		<ul style="list-style-type: none"> association contact lists ● Salesforce ● Direct outreach 		
1.4	Develop narrative-based content from participating owners and projects to illustrate the benefits of SOMAH to prospective applicants.	<ul style="list-style-type: none"> ● CalSOMAH.org ● Email (Marketo) ● Targeted advertisements and media ● Case studies ● Conferences ● Social media ● YouTube ● LinkedIn ● Facebook ● Instagram 	<ul style="list-style-type: none"> ● Property owners ● Property Management companies ● Affordable housing associations 	<ul style="list-style-type: none"> ● Q1-Q4 ● Quarterly and for use at Q1 and Q3 PO conferences
1.5	Develop presentations and webinars to enhance property owner capacity within SOMAH, addressing knowledge and participation obstacles. This includes creating tools, materials, and resources such as solar overviews, solar monitoring guides, project implementation checklists, etc.	<ul style="list-style-type: none"> ● CalSOMAH.org ● Email (Marketo) ● Upfront TA and Support Services ● Direct outreach ● Conferences 	<ul style="list-style-type: none"> ● Property owners and management companies 	<ul style="list-style-type: none"> ● Q1, Q2, Q3 ● Quarterly
1.6	Disseminate TA marketing and educational materials to increase Track A participation and use of TA services and increase TA applications.	<ul style="list-style-type: none"> ● CalSOMAH.org ● TA request form ● Eligibility prescreen service ● Email (Marketo) ● Conferences ● Direct outreach ● CBO toolkits ● Technical Assistance Preview Reports 	<ul style="list-style-type: none"> ● Property owners and managers 	<ul style="list-style-type: none"> ● Q1-Q3 2024 ● Monthly



1.7	Conduct thorough research on tribal needs, communication strategies, and the landscape of potentially eligible tribal properties to improve outreach strategies.	<ul style="list-style-type: none"> ● LIHTC application data ● Direct outreach ● Calls ● Interviews ● Workshops ● Salesforce ● Native American Heritage Commission Native American Contact List ● SOMAH Advisory Council 	<ul style="list-style-type: none"> ● Tribal entities 	<ul style="list-style-type: none"> ● Q1-Q2 2024 ● As needed
1.8	Launch marketing campaigns for newly eligible properties through SB 355 to inform them of programmatic changes.	<ul style="list-style-type: none"> ● CalSOMAH.org ● Email (Marketo) ● Upfront TA and Support Services ● Direct outreach ● Conferences ● Technical Assistance Preview Reports 	<ul style="list-style-type: none"> ● Property owners and management companies ● Tribes and Tribal housing authorities 	<ul style="list-style-type: none"> ● Q2, Q3-Q4 2024 ● After Handbook approval and regulatory proceedings
1.9	Broaden the SOMAH audience by adding new property owners to SOMAH email lists.	<ul style="list-style-type: none"> ● CalSOMAH.org ● Email (Marketo) ● Paid media campaigns ● Conference email lists ● RocketReach database ● LIHTC application data ● Salesforce ● Webinars 	<ul style="list-style-type: none"> ● Nonprofit property owners ● For-profit property owners ● Housing authorities ● Tribal entities ● Management companies 	<ul style="list-style-type: none"> ● Q1-Q4 2024 ● Monthly
1.10	Launch targeted external marketing campaigns to get new applications for SOMAH.	<ul style="list-style-type: none"> ● Google Ads ● Paid media 	<ul style="list-style-type: none"> ● Property owners and managers ● Tribal members 	<ul style="list-style-type: none"> ● Q1-Q3 ● Monthly
1.11	Continue to build upon the email nurture program to drive email subscribers to submit applications to SOMAH.	<ul style="list-style-type: none"> ● Email (Marketo) 	<ul style="list-style-type: none"> ● New and existing owner email subscribers ● New and existing Tribal email subscribers 	<ul style="list-style-type: none"> ● Q1-Q4 2024 ● Ongoing

1.12	Identify new co-marketing partners to market the SOMAH Program to their audiences.	<ul style="list-style-type: none"> ● SOMAH CBO Partners ● Affordable housing partner channels ● Webinars ● Conferences and events ● Clean energy programs ● Co-marketing toolkit ● CalSOMAH.org ● Social media ● Case studies, etc. from 1.4 	<ul style="list-style-type: none"> ● Property owners not on SOMAH email list ● Non-profit property owners ● For-profit property owners ● Housing authorities ● Tribal entities ● Property management companies ● Government agencies list 	<ul style="list-style-type: none"> ● Q1-Q4 ● Quarterly and at affordable housing conferences
1.13	Co-market with IOUs including Liberty and PacifiCorp to disseminate SOMAH materials including direct emails and mailers to their customers.	<ul style="list-style-type: none"> ● IOUs ● Co-marketing toolkit ● Case studies 	<ul style="list-style-type: none"> ● Property owners ● Property owners not on SOMAH email list ● Property management companies 	<ul style="list-style-type: none"> ● Q2, Q4 ● Biannually, as offered by IOUs
1.14	Integrate sponsorship opportunities only when this results in a direct marketing opportunity to have a booth and/or promotion at key industry events.	<ul style="list-style-type: none"> ● Statewide and/or regional conferences (Housing CA, SCANPH, CCRH) ● Electrification Training Series ● Clean energy events 	<ul style="list-style-type: none"> ● Property owners ● Management companies ● Affordable housing associations ● Clean energy partners 	<ul style="list-style-type: none"> ● Q1, Q3-Q4 ● Quarterly
1.15	Research and promote available solar financing information and resources to interested property owners.	<ul style="list-style-type: none"> ● CalSOMAH.org ● Email (Marketo) ● Direct outreach ● Webinars (GoToWebinar) 	<ul style="list-style-type: none"> ● Property owners and managers 	<ul style="list-style-type: none"> ● Q1-Q4 2024 ● As requested
1.16	Create marketing materials and launch paid media campaigns tailored to Tribal entities, including a tribal email nurture campaign, tribal flyers and digital ads	<ul style="list-style-type: none"> ● Direct outreach (email and phone calls) ● Email (Marketo) ● Tribal digital publications 	<ul style="list-style-type: none"> ● Tribal entities ● Tribal housing authorities 	<ul style="list-style-type: none"> ● Q1-Q3 after Handbook 8 is approved ● Monthly

Goal 2: Retain a robust and diverse contractor base and support eligible contractor participation with new application submissions

Overview

Contractors are highly motivated to connect with property owners who want to participate in the program and have led the application process for **99%** of current applications (see [SOMAH Semiannual Progress Report 2023-07-31](#)). The SOMAH PA recognizes the value contractors bring to the program and is committed to providing them support to successfully navigate the program. The PA provides this support by ensuring contractors have sufficient knowledge about SOMAH and its offerings to property owners and trainees, access to tools and resources to promote the SOMAH Program to property owners and information about program eligibility, requirements, submitting applications and online bidding.

Subcontractors

SOMAH defines a subcontractor as a solar contractor company that is not the primary contractor (often the applicant), but as the company that has been hired by the prime contractor to complete the solar installation for a SOMAH project. Primary research conducted by SOMAH in the form of one-on-one interviews and focus groups with SOMAH-eligible and ineligible contractors as well as input from Advisory Council members has concluded that the PA can increase contractor participation through subcontractor opportunities.

In 2023, the SOMAH PA launched a subcontractor tool to help prime contractors find subcontractors near SOMAH projects for installation opportunities. The subcontractor tool was featured in the December 2023 SOMAH Scoop newsletter. The SOMAH PA also created a new contractor resource that lists SOMAH-eligible power purchase agreement (PPA)¹⁵ providers. This resource is particularly useful for contractors who traditionally offer host customer-owned systems that would like to connect with a PPA provider and expand their system ownership offerings to include third-party owned systems. The PA expects this pairing will help with financial burdens and limitations with ownership options that smaller contractors have identified as barriers to participating in SOMAH.

Potential Contractors¹⁶

In 2023, the SOMAH PA also focused on engaging potentially eligible contractors in

¹⁵ Under a solar PPA, the property owner or the host customer pays per kilowatt-hour of energy produced on a monthly basis to the system owner.

¹⁶ Potential contractors are solar contractors who have not participated in the required eligibility process or signed up for the SOMAH email sign-up and must be recruited to participate in the program.



geographic areas where gaps in participating contractors exist. This outreach was primarily conducted through phone calls (calls to all eligible contractors in the Central Valley and the service territories of Liberty Utilities and PacifiCorp), email announcements by partner organization California Solar & Storage Association (CalSSA) and a Solar Power World magazine email to over 4,200 California-based solar contractors. Shortly after the Solar Power World campaign, October's Applicant and Contractor Eligibility Training had the highest registrations with 29 contractors, which can be attributed to this effort. The contractor regional gap continues to be unfulfilled and a focus of the PA in 2024. In 2023, The PA conducted contractor research in the PacifiCorp and Liberty service territories to find potential contractors who could join SOMAH. The PA will use the findings to conduct further outreach in 2024. Detailed findings can be found in the [2024 January Semiannual Progress Report](#) (SAPR).

Challenges and Lessons Learned

Increasing contractor participation has remained challenging. In 2023, the program continued to have a low number of participating contractors compared with the number of eligible contractors, with **14** out of 183 participating.¹⁷ A total of **25** new contractors became eligible for SOMAH in 2023. SOMAH considers the new signups a success because new contractors may have viable leads that other contractors are not aware of and can lead to more application submissions. However, no new eligible contractors submitted any applications. SOMAH had more success engaging subcontractors, working with **22** existing primary contractors to complete **81** installations. The PA views this as a noteworthy success given the feedback from interviews that many contractors are interested in learning more about SOMAH through a subcontracting opportunity or are specifically interested in the subcontractor role versus acting as a primary contractor due to capacity, experience and other constraints. The PA is looking forward to continuing to increase the number of participating contractors through one-on-one consultations, reengaging SOMAH-eligible contractors with program updates, Contractor Office Hours webinars and improvements to the contractor nurture campaign.

SOMAH continues to streamline program information and update materials to make program requirements easier to understand, as noted in contractor feedback, including the second [Triennial SOMAH Evaluation](#) (2023).

In 2023, new resources were created to make the application process easier to navigate. Application tutorial videos were released for each application SOMAH milestone. The SOMAH PA created a contractor email nurture campaign to disseminate the information and marketing materials that contractors pinpointed as most important to them. The campaign sent seven emails to all email listserv subscribers self-identified as contractors between May 11, 2023, and August 3, 2023. The campaign reached **488**

¹⁷ A nonparticipating SOMAH-eligible contractor has completed the eligibility process but has not submitted an application



contractors and generated **1,903** email openings throughout the nearly three-month time frame.

Figure 8: Contractor Email Nurture Campaign Statistics

	Email Name	Sent	Delivered	% Delivered	Opened	% Opened
Email 1	Success Tips for SOMAH Contractors	501	488	97.4%	297	60.9%
Email 2	Property Eligibility Requirements	492	484	98.4%	293	60.5%
Email 3	Affordability Prescreen Request	486	476	97.9%	276	58.0%
Email 4	Eligible Properties Map	480	472	98.3%	262	55.5%
Email 5	Costs, Incentives & Financial Basics	470	459	97.7%	261	56.9%
Email 6	Tips for Working with MFAH	463	455	98.3%	253	55.6%
Email 7	Contractor Marketing Toolkit	455	442	97.1%	261	59.0%
	Total	3,347	3,276	97.9%	1,903	58.1%

moving forward, each new contractor who subscribes to the listserv will receive nurture campaign emails to ensure they benefit from the same engagements and information. Website stats show contractors typically do not engage with the program's resources, yet contractors reported in the second Triennial SOMAH Evaluation (2023) a desire for more program resources.

Priorities and Key Strategies for Contractors

- *Prioritize outreach to contractors headquartered in DAC and application gap regions*

The majority of SOMAH applications continue to be contractor-led (Track B) applications (see [2024 January SAPR](#)). The SOMAH PA expects an increase in applications by focusing on contractor outreach in DACs and where there are few or no eligible contractors. In 2023, direct outreach efforts led to new eligible contractors joining the program from the PacifiCorp and Liberty Utilities service territories as well as the Central Valley. SOMAH was not able to engage solar contractors on tribal lands and will continue this effort in 2024.

- *Increase application submissions for current nonparticipating contractors*

The number of participating contractors and subcontractors versus nonparticipating contractors is low — **36** (**22** subcontractors and **14** prime contractors) out of **183** eligible contractors. The SOMAH PA educates contractors on complex program requirements and how to use the SOMAH Eligible Properties Map for lead generation. Contractor Office Hour webinars in 2023 engaged contractors on important program requirements of VNEM (with **34** registrations) and fleet monitoring (with **16** registrations). In Q1 2024, SOMAH will host SB355 and Handbook 8 focused Office Hours. In Q2 2024, property leads Office Hours

will be scheduled, also covering tribal property outreach and differences in requirements. The PA is also planning on having general office hours where topics are not focused on to encourage more questions from contractors.

- **Reintroduce SOMAH Progress Payment Pathway to contractors**

SOMAH's second Triennial SOMAH Evaluation (2023) reported that many contractors interviewed were not aware of the handbook change that allowed the Progress Payment Pathway Milestone, which allows applicants to receive 60% of the SOMAH incentive before the Incentive Claim Milestone. Finding 7 states "Contractors reported that the financial costs of the program make it difficult for smaller contractors without as much capital to participate. Participating and nonparticipating contractors believed that these larger contractors are the only companies able to secure contracts through the SOMAH Program because they have the capacity to withstand financial risk. Both participating and nonparticipating contractors stated the incentive structures were too low to either engage property owners or to make a profit." Therefore, the pathway will be reintroduced to contractors with an informative email in 2024 and an email will be added to the contractor nurture campaign to ensure eligible contractors are aware of the program offering.

SMARTIE Objective(s): All to be achieved by November 2024

1. Continue outreach (direct emails and calls) to potentially eligible contractors across geographic gap regions, regions with limited SOMAH-eligible contractors and where there are eligible properties: Liberty Utilities-6 , PacifiCorp-10, Central Valley-approximately 21, and tribal lands-research required).
2. Re-engage contractors through at least two refresher training sessions including office hours.
3. Increase application submissions by at least four nonparticipating contractors.
4. Hold four Contractor Eligibility Trainings.
5. Match subcontractors to all of the applications that would like a third-party contractor to assist with PV installations, subject to need by primary or subcontractor and upon request.



2024 Audiences and Main KPIs

<p>Audiences</p> <ul style="list-style-type: none"> • Diverse contractors (women, minority and/or LGBTQ+-owned businesses) • Contractors with applications • Potential contractors • Nonparticipating contractors • Subcontractors 	<p>Main KPIs</p> <ul style="list-style-type: none"> • Number of new SOMAH-eligible contractors and subcontractors • Number of new self-identified diverse SOMAH-eligible contractors (women, minority and/or LGBTQ+-owned businesses) • # of applications per contractor • Number of applications from diverse or small contractors that had no previous applications through 2023 • Number of contractor webinar registrants • Number of direct emails opened or completed calls to eligible nonparticipating contractors in gap regions
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Activities

No.	Activity	Channels/tools	Audience	Duration
2.1	Develop and execute a plan for expanding contractor coverage into low coverage and priority geographic areas.	<ul style="list-style-type: none"> • Direct emails • Direct calls • Social media campaigns 	<ul style="list-style-type: none"> • Potential contractors • Nonparticipating contractors 	<ul style="list-style-type: none"> • Q1-Q4 • For Eligibility Trainings
2.2	Improve email nurture campaign for nonparticipating contractors by adding additional content, such as the progress payments pathway.	<ul style="list-style-type: none"> • Marketo • CalSOMAH.org 	<ul style="list-style-type: none"> • Contractors in listserv 	<ul style="list-style-type: none"> • Q1-Q4 • As needed

2.3	Update Eligibility Training as needed.	<ul style="list-style-type: none"> Eligibility Training 	<ul style="list-style-type: none"> Potential contractors Nonparticipating contractors Subcontractors 	<ul style="list-style-type: none"> Quarterly With program updates and evaluation recommendations
2.4	Pair active contractors with subcontractors for installation and/or finance opportunities with PPA providers.	<ul style="list-style-type: none"> Direct emails Direct calls Marketo CalSOMAH.org - subcontractor tool 	<ul style="list-style-type: none"> Eligible nonparticipating subcontractors Subcontractors Contractors with applications 	<ul style="list-style-type: none"> Q1-Q4 As needed
2.5	Collect and analyze contractor demographic data.	<ul style="list-style-type: none"> Primary contact information 	<ul style="list-style-type: none"> Newly eligible contractors 	<ul style="list-style-type: none"> Q1-Q4 After Eligibility Training
2.6	Improve marketing materials for contractors to use when engaging property owners according to feedback, such as the progress payment pathway.	<ul style="list-style-type: none"> Marketing toolkit CalSOMAH.org 	<ul style="list-style-type: none"> Contractors (all) 	<ul style="list-style-type: none"> Q1-Q4 With program updates and evaluation recommendations
2.7	Hold office hour webinars with a special topic based on frequently asked questions and important program updates.	<ul style="list-style-type: none"> Webinars 	<ul style="list-style-type: none"> Nonparticipating contractors 	<ul style="list-style-type: none"> Q1-Q3 Quarterly
2.8	Promote SOMAH through external	<ul style="list-style-type: none"> CalSSA 	<ul style="list-style-type: none"> Potential contractors 	<ul style="list-style-type: none"> Q1-Q4

	SOMAH channels.	<ul style="list-style-type: none"> ● Partner channels 		<ul style="list-style-type: none"> ● For Contractor webinars
2.9	Leverage narrative-based content (from Goal 1 Activities) to encourage participation with nonparticipating contractors.	<ul style="list-style-type: none"> ● CalSOMAH.org ● Email (Marketo), see activity 2.2 	<ul style="list-style-type: none"> ● Nonparticipating contractors ● Potential contractors 	<ul style="list-style-type: none"> ● Q1-Q4 ● Ongoing
2.10	Market contractor engagement position for one-on-one consultations and meetings with property owners.	<ul style="list-style-type: none"> ● CalSOMAH.org ● Email (Marketo) ● Eligibility Training ● Office Hours ● Newsletter 	<ul style="list-style-type: none"> ● Contractors (all) 	<ul style="list-style-type: none"> ● Q1-Q4 ● Ongoing, as requested
2.11	Update eligibility map program statuses and expand property data with SB 355 eligibility improvements.	<ul style="list-style-type: none"> ● CalSOMAH.org ● Email (Marketo) ● Contractor Office Hours webinar ● Direct emails 	<ul style="list-style-type: none"> ● Contractors (all) 	<ul style="list-style-type: none"> ● Q1-Q2 ● When data is confirmed and available
2.12	Attend solar contractor event for networking and program outreach.	<ul style="list-style-type: none"> ● Intersolar North America Conference 	<ul style="list-style-type: none"> ● Contractors (all) 	<ul style="list-style-type: none"> ● Q1 ● January 2024

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

Overview

The SOMAH PA continues to build the pipeline of eligible job trainees. In 2023, job training outreach efforts focused on the following:

- Informing [SOMAH-eligible job training organizations](#) (JTOs) about SOMAH's job training opportunities as a pathway for their students and graduates to get hands-on experience on multifamily solar photovoltaic installations.
- Encouraging job seekers and prospective job trainees to sign up for the SOMAH [Job Training Portal](#), where they can use the resume bank and job board to find open training opportunities and connect with SOMAH contractors.
- Educating job seekers and job trainees on career development resources and solar career opportunities.
- Supporting contractors' fulfillment of SOMAH's job training requirements by connecting them with job seekers and local JTOs, thus helping ensure SOMAH trainees are local and targeted hires.

The SOMAH PA regularly conducts outreach and engagement with prospective job trainees, JTOs, contractors, tenants and CBO partners through meetings, presentations and webinars to ensure goals are met and job training opportunities are successful. In 2023, the SOMAH PA's workforce development ME&O efforts focused on eight objectives with emphasis on the core program audiences (contractors, JTOs and job trainees). The status, challenges and lessons learned from these objectives are discussed below and were used in the development of 2024 program objectives.

Contractor Job Training Support

The SOMAH PA directly supports contractors with job training requirements by helping them connect with eligible trainees. In February and September 2023, the PA provided semiannual Job Training Overview webinars that presented a detailed overview of the job training requirements and shared helpful resources for facilitating meaningful job training experiences. Beginning in Q2 2023, the SOMAH PA also launched a contractors' needs assessment to gauge hiring, training and workforce development needs from solar contractors eligible for the program. The feedback provided will allow the SOMAH PA to better support contractors in 1) complying with SOMAH's job training requirements, 2) staying competitive in the solar industry and 3) improving SOMAH's workforce development services.

Job Training Organization Outreach

JTOs are trusted partners in connecting trainees with SOMAH projects. In 2023, the SOMAH PA's ME&O efforts focused on targeted outreach to JTOs local to SOMAH projects, JTOs serving targeted populations – in particular, those in hard-to-reach regions – and JTOs serving Tribal communities. Furthermore, the SOMAH PA worked toward ensuring areas with active or waitlisted projects engaged at least one JTO in the same county. In 2023, **65%** of projects met these criteria. To ensure the success of future projects, the SOMAH PA will continue to focus on outreach to JTOs in certain targeted regions (including Tribal communities and rural areas) while redirecting focus toward strengthening relationships with current JTO partners in 2024. In Q2 2023, the workforce development team implemented a stipend program to assist trainees willing to travel to work on SOMAH projects by reimbursing the cost of travel and/or lodging. This stipend is only available to trainees and can be accessed through a direct request to the workforce development team or through a referral from a partner JTO. The combination of stronger JTO partnerships and the newly implemented stipend will help ensure all SOMAH projects meet the workforce development requirements even when there are no JTOs within the same county. SOMAH's CBO partners and SOMAH's JTO Task Force also support JTO outreach. CBOs inform their local communities about SOMAH's job training opportunities and facilitate local JTO connections. The JTO Task Force advises the SOMAH PA on strategies to connect with JTOs, support job trainees in accessing solar careers and link with solar employers.

The SOMAH PA is also increasing tenant participation in job training opportunities by informing tenants of the opportunities via tenant education workshops (**See 2024 Goal 4 for more information**). The SOMAH PA is also working with CBOs to include more information about workforce development opportunities in tenant outreach/education materials. To date, **17** tenants have participated in SOMAH projects as trainees. Through this new approach, trainees will learn about SOMAH job training opportunities earlier in the process, increasing the time frame in which they can apply to participate in a project.

The JTO Task Force serves to ensure that the voices and interests of job training organizations remain at the forefront of the SOMAH Program's job training efforts. The SOMAH PA and the JTO Task Force have developed strategies that include outreach methods and pathways to reach targeted applicants and recommendations on how to reduce regional and service gaps.

Job Trainee Support

The SOMAH PA supports job trainees via webinars and workshops geared toward professional development including the *Fair Chance Hiring workshop* (July 2023). Additional support measures for trainees includes providing education to contractors on the benefits of expanding their workforce by increasing awareness of and accessibility to career opportunities. These strategies offer the SOMAH PA multiple ways to encourage job trainees to update and upload their resume into the resume bank on the SOMAH Job Training Portal, increasing their exposure to SOMAH contractors and



employers. While it is encouraged for Job Portal registrants to upload resumes and certifications for a competitive edge, it is not mandatory. We provide support in crafting and enhancing resumes for trainees. The 2023 objective to have 30% of job trainees in the Job Training Portal have resumes on file was reached. The SOMAH PA will continue to emphasize the importance of resumes during presentations to all audiences to increase this metric's performance in 2024.

The SOMAH job trainee program provides a diverse array of opportunities for potential trainees to gain valuable experience. While contractors primarily rely on SOMAH trainees for solar installation tasks, these trainees have also been involved in other aspects, including proposal writing, project management, and post-installation operations and maintenance. Our curated resources not only support a hands-on installation experience but also contribute to the professional growth of trainees, nurturing their expertise in the solar industry. This will give SOMAH job trainees the ability to apply confidently to solar installer roles but also relevant career options, like project managers, site surveyors, permit runners, and site inspectors.

In Q1 2023, the SOMAH PA launched a free, online repository of solar training classes in partnership with HeatSpring titled [SOMAH Academy: Comprehensive Solar Study](#). This includes a curated list of free courses that can be completed online independently. The workforce development team also added a resume template and an online resume builder to the Job Training Portal for trainees to use free of charge. These resources were developed to expand accessibility for potential job seekers and the pool of available employees for contractors to work with to fulfill SOMAH job training requirements.

Obstacles and Insights

The SOMAH PA's tactics are intended to secure hiring for local and targeted hires¹⁸ and trainees living in DACs. As of November 2023, **79%** of job trainees were local hires and **47%** lived in DACs. While the outlined objectives for 2023 sought to have **90%** and **51%** respectively, those goals were not met because contractors ultimately make all hiring decisions regardless of recommendations or urging from the SOMAH PA. For example, contractors may continue to work with the same trainee on several projects, and while the trainee may have been local at one point, they may not be for subsequent projects. Lastly, outreach to trainees in DACs is challenging because the SOMAH PA does not have information on how many of the trainees referred by JTOs and CBOs live in a DAC at the first point of contact. Generally, the PA has concentrated on targeted

¹⁸ SOMAH defines a local hire as an individual who lives within the same county as the SOMAH project and targeted hire to include: DAC residents, affordable housing residents, women, people of color and other individuals who face barriers to employment: being homeless, being a custodial single parent, receiving public assistance, lacking a GED or high school diploma, participating in a vocational English as a second language program, or having a criminal record or other involvement with the criminal justice system.

populations since there are JTOs with specific audiences, who the SOMAH PA can connect with (i.e., re-entry, English as a Second Language).

Priorities and Key Strategies for Job Trainees, JTOs and Contractors

- *Analyze and develop a plan of action from the Contractor Workforce Needs Assessment*

In 2023, the SOMAH PA launched the Contractor Workforce Needs Assessment to survey contractors on hiring needs and their trainee experiences. The SOMAH PA anticipates being able to report on these findings in the July 2024 Semiannual Progress Report. The SOMAH PA will use these findings to adapt SOMAH's ME&O efforts around promoting SOMAH's Technical Assistance and Support Services to better support contractors. The SOMAH PA will continue to engage the Job Training Organization Task Force on solar industry workforce needs and training opportunities to provide trainees with meaningful and career-advancing opportunities.

- *Help to ensure job trainees have meaningful job training experiences*

The SOMAH PA will continue to conduct job trainee surveys in 2024 to gather feedback on the job trainee experience, job placement and retention. Per recommendations from Verdant in SOMAH's second Triennial Third-Party Evaluation, the survey will be modified to incorporate questions around trainee motivations for participating, how this impacts their interests in solar careers moving forward and their overall interests and expectations regarding a career in solar and renewable energy industries. Survey responses will allow the SOMAH PA to improve trainees' SOMAH job training experience.

- *Support contractors with local and targeted hiring of job trainees*

The SOMAH PA will continue to provide personalized support to contractors to help them meet the job training requirements and recruit qualified job trainees, prioritizing local and targeted trainees¹⁹ for every SOMAH project. In its outreach, the SOMAH PA works with JTOs serving targeted populations and organizations located in SOMAH project areas. This also includes connecting contractors to local JTOs to foster direct hiring pipelines and employer-trainer relationships.

- *Celebrate job training successes through narrative based content*

A crucial aspect of increasing awareness of job training opportunities is sharing firsthand experiences of program participants. The SOMAH PA and its CBO partners have developed promotional materials (e.g., success stories, blogs, testimonials) using material from interviews of job trainees, JTOs and contractors about how SOMAH's job training opportunities have benefited them. These materials have been published on the SOMAH website. The SOMAH PA will continue to collect interviews and stories in 2024 to share them with prospective job trainees and JTOs to increase participation in the SOMAH Program.

¹⁹ SOMAH defines a local hire as a trainee that resides in the same county as the SOMAH project. SOMAH defines a targeted hire as a trainee that is a resident of disadvantaged communities (per [CalEnviroScreen 4.0](#)), affordable housing residents, women, people of color and other individuals who have faced or who have overcome at least one of the following barriers to employment: being homeless, being a custodial single parent, receiving public assistance, lacking a GED or high school diploma, participating in a vocational English as a second language program or having a criminal record or other involvement with the criminal justice system.

- *Engage and prepare tenants for SOMAH job training opportunities and solar careers*

Starting in 2023, the SOMAH PA has focused more efforts on connecting tenants to local JTOs and to SOMAH contractors by focusing outreach in three ways. The first way is by working with CBOs to promote tenants as eligible trainees in their outreach. The second is by promoting tenants as eligible trainees through SOMAH's tenant education services and webinars. The third is through increased coordination between contractors and property owners for on-site job trainee recruitment. These efforts to promote tenants as trainees will continue in 2024 due to the increase in awareness resulting from the collaboration with the tenant education team, benefiting overall trainee recruitment. The workforce development and tenant education teams will also collaborate to further integrate workforce development information into tenant education materials and present job training opportunities early in the installation process.

SMARTIE Objective(s): All to be achieved by November 2024

1. Strategically engage and confirm the eligibility of a JTO in one or more of the four following priority areas per quarter: Northern California, Central Valley, Central Coast and Tribal communities.
2. Educate SOMAH contractors on job training requirements, jobsite safety and relevant labor policies and best practices by hosting at least two contractor-focused job training webinars.
3. Educate and engage job seekers and job trainees on solar career pathways and high value soft skills in preparation for solar careers by hosting two job trainee-focused webinars.
4. Ensure at least 35% of job trainees in the Job Training Portal have resumes on file.
5. Ensure at least 80% of hired SOMAH job trainees are local or targeted hires by doing targeted outreach to JTOs local to SOMAH projects and JTOs serving targeted populations.
6. Do targeted outreach to JTOs serving DACs to reach a goal of 40% of job trainees living in DACs.
7. Ensure 25% of job trainees complete the job trainee survey.



2024 Audiences and Main KPIs

<p>Audiences</p> <ul style="list-style-type: none"> ● Prospective job trainees, specifically: <ul style="list-style-type: none"> ○ Tenants of SOMAH properties ○ Local job trainees who reside in the same county as active SOMAH projects ○ Targeted hires (those who have experienced barriers to employment) ○ Tribal communities ● Eligible JTOs ● Potentially Eligible JTOs ● Communities reached by CBO partners ● Contractors facilitating the job training requirements 	<p>Main KPIs</p> <ul style="list-style-type: none"> ● Number of SOMAH-eligible JTOs that serve tribal communities ● Number of SOMAH-eligible JTOs in Northern California, Central Valley and Central Coast ● Number of touch points with existing JTO partners ● Number of job trainees signed up for the SOMAH Job Training Portal ● Percent of job trainees with a resume uploaded in the resume bank on the SOMAH Job Training Portal ● Number of job trainees hired ● Percent of job trainees who are local or targeted hires ● Percent of job trainees who reside in DACs
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Activities

No.	Activity	Channels/tools	Audience	Duration
3.1	Conduct targeted outreach to: <ul style="list-style-type: none"> ● Current JTO partners. ● JTOs that serve tribal 	<ul style="list-style-type: none"> ● Direct phone calls/meetings ● Direct emails ● Job training overview presentations 	<ul style="list-style-type: none"> ● JTOs 	<ul style="list-style-type: none"> ● Q1-Q4 ● Ongoing

	<p>communities.</p> <ul style="list-style-type: none"> • Electrical training programs. • JTOs that serve DACs. • JTOs that serve targeted populations to encourage their students/trainees to join SOMAH's Job Training Portal and resume bank. 	<ul style="list-style-type: none"> • Digital collateral 		
3.2	<p>Host at least four webinars for workforce development audiences.</p>	<ul style="list-style-type: none"> • Webinars 	<ul style="list-style-type: none"> • Job trainees • JTOs • Contractors 	<ul style="list-style-type: none"> • Q1-Q4 • Quarterly
3.3	<p>Increase engagement on Job Training Portal and resume bank use.</p>	<ul style="list-style-type: none"> • Direct emails to job trainees with limited engagement on the Job Training Portal • Job Training Newsletter • Social media 	<ul style="list-style-type: none"> • Job trainees • Contractors 	<ul style="list-style-type: none"> • Q1-Q4 • Quarterly

3.4	Share job training experiences via narrative-based content with relevant SOMAH audiences to encourage job trainee participation and contractor hiring success.	<ul style="list-style-type: none"> ● CalSOMAH.org ● Social media ● Job Training Newsletter ● Webinars 	<ul style="list-style-type: none"> ● Job trainees ● JTOs ● Contractors ● CBOs 	<ul style="list-style-type: none"> ● Q1-Q4 ● Quarterly
3.5	Survey job trainees who have participated in job training opportunities about their SOMAH training experience and career progression.	<ul style="list-style-type: none"> ● Survey 	<ul style="list-style-type: none"> ● Job trainees 	<ul style="list-style-type: none"> ● Q1-Q4 ● As projects are completed

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

Overview

The primary objective of tenant education is to ensure tenants living in potentially eligible SOMAH properties and tenants living in properties participating in SOMAH are aware of and able to benefit equitably from SOMAH. Tenant education (TE) goals are to ensure tenant safety, reduce tenant confusion and discomfort during installation and help center community voices. To achieve this, the SOMAH PA continues to work closely with the program's eight CBO partners²⁰ who support tenant education by conducting community and tenant outreach, supporting TE material development, assisting contractors and property owners with TE services, sharing SOMAH's workforce development opportunities and engaging local and regional government entities around co-marketing opportunities with the SOMAH PA.

Community-Based Organization Partnerships

The PA's CBO partnerships are key in achieving SOMAH's TE goals. These goals include creating culturally appropriate TE materials for the communities they serve, supporting TE services (e.g., facilitating TE workshops) and doing community outreach to residents in both participating SOMAH properties and potentially eligible SOMAH buildings. Additionally, SOMAH's expanded eligibility through the passing of SB 355 will most likely increase the number of potentially eligible properties, including Tribal properties that may participate in SOMAH. To support increasing Tribal participation, the SOMAH PA will be updating outreach materials and identifying community-based organization(s) that serve Tribal communities or related organizations like Tribal housing authorities to build connections and potential future partnerships.

Tenant Education

CBO partners and the SOMAH PA continue to prioritize promoting SOMAH's TE services. These services provide property owners and contractors free direct support to complete their tenant education requirements and/or provide continued tenant education to residents at completed SOMAH projects. These promotion efforts are primarily conducted through phone calls, direct emails and quarterly webinars (held in February, April, August and October 2023). The SOMAH PA coordinates with on-site property staff or the host customer to ensure materials are accessible to residents based on needs, including language, readability and format (PowerPoint, handouts, etc.).

²⁰ SOMAH CBO partners are: California Environmental Justice Alliance, The Asian Pacific Environmental Network, Communities for a Better Environment, Community Environmental Council, Environmental Health Coalition, OC Goes Solar, Self-Help Enterprises, The Niles Foundation.

- *Tenant Education Workshops*

In 2023, the SOMAH PA and CBO partners conducted **13** TE workshops in the following areas: Palm Desert, Stockton, Bishop Paiute Tribe Reservation, Sanger and Oakland. Workshops were adapted to meet the needs of residents, customizing elements like location, language, timing and resident profile, which included creating separate sessions for adults and children. The SOMAH PA will continue to evaluate survey findings about TE materials and plans to update SOMAH's tenant education requirement to incorporate pre- and post-installation TE materials. Planned updates include developing a tenant testimonial video to be released by Q4 2024. The ME&O efforts, supported or led by CBO partners, provide opportunities to achieve the PA's objective to engage at least 50% of tenants with more than one touch point, to support tenants in accessing the direct long-term financial benefits of the SOMAH Program. Such touch points include newsletters, continued engagement, educational content/workshops, etc.

- *Tenant Education Surveys*

In 2023, the SOMAH PA received feedback from TE surveys. These surveys were employed to help the SOMAH PA better understand the effectiveness of SOMAH's TE materials. The surveys were launched in Q4 2022 and mailed to nine completed SOMAH projects. Although the majority of surveys were completed online and via mailed back responses, the SOMAH PA and CBO partner CEJA administered in-person surveys at one of the project locations. In 2024, the SOMAH PA will analyze findings in the survey to inform changes in TE materials and how they are disseminated to ensure tenants understand SOMAH's benefits.

Challenges and Lessons Learned

The SOMAH PA has been streamlining its communication about SOMAH and its benefits to tenants. For example, tenant education workshops are often paired with workforce development workshops to bring awareness of job trainee opportunities for tenants living in SOMAH projects. As a job trainee, tenants can receive paid job training experience. By pairing the tenant and workforce development workshop, residents are more readily aware of job training opportunities early enough to apply and participate, thus removing the barrier presented by inconsistent outreach.

In 2023, the SOMAH PA sought to have at least 10% of tenants living in buildings enrolled in SOMAH participate as job trainees and as of November 15, 2023, residents represent **7%** of job trainees. This is most likely because timeline eligibility and position accessibility/availability fluctuate and are an indication of changes needed in how TE materials are being shared. In 2024, the PA will explore the feasibility of a tenant "ambassador program," as well as other options to ensure residents receive tenant education that is relevant, informative and with equitable methods of outreach. These tactics align with the SOMAH PA's own internal plans that began in 2023 and the third-party evaluator's phase III recommendations.

Priorities and Key Strategies for Tenant Engagement

- *Increase property owner and/or contractor engagement with tenant education services*

The SOMAH PA will continue to promote the program's tenant education services, including expanded continuing tenant education services, through one-on-one calls and other existing outreach methods to property owners and contractors participating in the program. These services ensure property owners and contractors complete the TE requirement for their projects equitably and that tenants receive comprehensive TE materials. The SOMAH PA plans to implement with the support of CBO partners an initiative around engaging properties with underperforming solar systems to prioritize them for continued tenant education. Additionally, the SOMAH PA will continue engaging program participants around proposed changes so that if/when they occur, property owners and contractors feel prepared.

- *Strengthen and revise current tenant education requirements to be more effective*

In early 2024, the SOMAH PA intends to revisit its plan to adjust tenant education requirements, so that administering tenant education is more consistent and effective across all SOMAH projects. Currently, the methods and effectiveness of tenant education varies across projects. Some properties receive engaging workshops, while others receive more passive and ultimately ineffective outreach (mailers). The SOMAH PA will continue attempts to mitigate this issue through proposed updates to current TE requirements, adapting TA materials and resources and building capacity to support more projects with tenant education services.

SMARTIE Objective(s): All to be achieved by November 2024

1. Ensure contractors and property owners understand how to fulfill tenant education requirements (including updates to requirements) through quarterly Tenant Education Training webinars, listserv announcements, public forums and contractor emails.
2. Revise SOMAH tenant education materials based on tenant feedback from surveys, focus groups and community-based partners.
3. Design revised materials to include resources specifically for youth, people with disabilities, seniors and tenants with limited access to technology to ensure all tenants have an accessible curriculum.
4. Create at least one tenant testimonial video from a completed SOMAH project that focuses on the benefits of SOMAH for tenants.
5. Facilitate at least one tenant education workshop per quarter to support program participants complete tenant education requirements.
6. Increase tenant participation in job training opportunities to 10% of hired job trainees by collaborating with the SOMAH workforce development team to encourage local hiring by contractors through webinars.



2024 Audiences and Main KPIs

<p>Audiences</p> <ul style="list-style-type: none"> • Tenants in properties enrolled in SOMAH • Tenants interested in job training opportunities • Community-based organization partners • Contractors • Property owners • Local and regional stakeholders 	<p>Main KPIs</p> <ul style="list-style-type: none"> • Number of tenant education services workshops conducted by SOMAH PA team or CBO partners • Number of tenant education webinars conducted for contractors and property owners • Number of tenants who enroll in energy savings/assistance programs • Number of views for tenant education videos • Number of calls to the TE hotline and share of inquiries successfully fielded • Number and percent of tenants that participated in job training opportunities
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Activities

No.	Activity	Channels/tools	Audience	Duration
4.1	Educate participating property owners and contractors about tenant engagement and prepare them to comply with tenant education requirements.	<ul style="list-style-type: none"> • Workshops • Webinars • Flyers • Emails • Phone calls • CBO toolkits 	<ul style="list-style-type: none"> • Property owners • Contractors 	<ul style="list-style-type: none"> • Q1-Q4 • Quarterly
4.2	Continue CBO and SOMAH PA facilitated tenant education services	<ul style="list-style-type: none"> • Workshops • Flyers 	<ul style="list-style-type: none"> • Tenants in SOMAH properties 	<ul style="list-style-type: none"> • Q1-Q4 • As requested

	remotely/in-person tenant workshops ²¹ to support the second TE requirement.	<ul style="list-style-type: none"> • Emails 		
4.3	Work with CBOs to educate property owners on how to inform tenants about program benefits and job training opportunities.	<ul style="list-style-type: none"> • Workshops • Newsletters • Email blasts • CBO Resource Hub 	<ul style="list-style-type: none"> • Property owners 	<ul style="list-style-type: none"> • Q1-Q4 • Ongoing
4.4	Identify barriers/challenges for tenants in participating in job trainee opportunities.	<ul style="list-style-type: none"> • TE Workshop Feedback Evaluation • Interviews 	<ul style="list-style-type: none"> • Tenants in SOMAH buildings 	<ul style="list-style-type: none"> • Q1-Q4 • Ongoing
4.5	Evaluate and optimize tenant education content on CalSOMAH.org aimed at tenants. Monitor trends and continually optimize the site and materials to facilitate a clear user path and determine content additions and enhancements.	<p>Print Materials</p> <ul style="list-style-type: none"> • Simple Ways to Save Energy • What to Expect with SOMAH • How Will Your Bill Change? • Get Paid to Install Solar on Your Building • How Solar Energy Works 	<ul style="list-style-type: none"> • Tenants in SOMAH buildings • CBOs 	<ul style="list-style-type: none"> • Q1-Q3 • Until Evaluation is completed

²¹ The SOMAH PA has forecasted doing three TE workshops per quarter

		<ul style="list-style-type: none"> ● Installation Timeline 		
4.6	Collect narrative-based content centered around tenants benefiting from SOMAH and share via targeted media and social media outlets.	<ul style="list-style-type: none"> ● Media ● Social media ● CalSOMAH.org ● CBO toolkits ● Case studies ● Success stories ● Testimonials 	<ul style="list-style-type: none"> ● General public ● Stakeholders ● Tenants ● Property owners 	<ul style="list-style-type: none"> ● Q1-Q4 ● As needed
4.7	Staff and optimize multilingual tenant hotline to answer questions with pre-recorded messages and live support.	<ul style="list-style-type: none"> ● Phone line 	<ul style="list-style-type: none"> ● Tenants in SOMAH buildings 	<ul style="list-style-type: none"> ● Q1-Q4 ● Ongoing

Goal 5: Ensure stakeholders are informed and actively co-marketing the program

Overview

Connecting with SOMAH stakeholders across California is crucial to the program's success. SOMAH Program stakeholders include investor-owned utilities (IOUs), community choice aggregators (CCAs), regional energy networks (RENs) and government agencies at the city and county as well as elected and appointed officials. These stakeholders help bring notoriety and name recognition to the SOMAH Program, build trust with target communities and identify opportunities for SOMAH to layer with and support relevant clean energy and energy efficiency programs. The stakeholder outreach goal is twofold: to inform stakeholders about the SOMAH Program and to encourage action leading to application submissions as the program progresses toward its overall installation goal of 300 MW of projects.

Outreach Success

In 2023, SOMAH stakeholder outreach efforts led to successful partnerships. To continue to expand SOMAH's network and reach, the PA prioritized building new and fostering existing partnerships with **20 co-marketing partners**. These collaborations not only extended SOMAH's promotional reach through partner channels but also facilitated seamless referrals of property owners across various programs and partner organizations. Co-marketing efforts included co-leading webinars targeting property owners, developing cross-program referral processes, collaborating on direct outreach activities and identifying key challenges and solutions to solar adoption. SOMAH's 2023 co-marketing partners include:

- Disadvantaged Communities – Single-Family Solar Homes Southern California Association of Non-Profit Housing Energy Smart Homes
- Tri-County Regional Energy Network Vermont Energy Investment Corporation Liberty Utilities
- PacifiCorp Utility
- Bay Area Regional Energy Network (BayREN) and Bay Area Multifamily Building Enhancements (BAMBE) Program
- Southern California Regional Energy Network
- TECH Clean California
- Climate Action Campaign
- San Diego Regional Climate Collaborative
- San Diego Green Buildings Council
- San Diego Solar Equity Program
- City of Chula Vista
- Orange County Power Authority
- Mayor of Sanger
- Congressman Mike Levin



- County of Los Angeles
- Sierra Club of Los Angeles
- City of Irvine
- San Diego Community Power

Partner outreach highlights include:

1. Joint panel discussion at the [California Climate and Energy Collaborative \(CCEC\) Forum](#) with BayREN's BAMBE Program during which an example of a SOMAH project that used both programs was featured.
2. Property owner focused webinar with Energy Smart Homes (a PG&E single point of contact energy efficiency program).
3. Joint webinar panel hosted by the San Diego Green Building Council (SDGBC) featuring solar equity programs San Diego Solar Equity Program, DAC-SASH and SOMAH.
4. Joint webinar with the [Climate Action Campaign](#)'s electrification programs for property owners.

In 2024, the SOMAH PA will continue to cultivate these partnerships and look for additional opportunities to co-market the program. Speaking opportunities at conferences will continue to be a key strategy for stakeholder outreach, building on the opportunities that the PA had to speak in 2023 at a [SDGBC webinar](#) and the [CCEC Forum](#).

Ribbon-cutting ceremonies celebrating completed projects are also a tactic for partnering with and promoting SOMAH to stakeholders – allowing them to showcase their support for SOMAH as they meet constituents. Both SOMAH-led and applicant-led ribbon-cuttings have engaged valuable stakeholders including government officials and IOU staff, including the Mayor of the City of Sanger and CA 49th District Representative. In 2023, the SOMAH PA will continue to leverage completed projects to build relationships with relevant stakeholders and to encourage those stakeholders to share successes of the completed projects via their own outreach channels. Throughout 2023, the SOMAH PA will continue outreach to local government offices focused on sustainability, energy and climate action planning in areas in which there are identified eligible properties.

Finally, the SOMAH PA will guide the contracted CBOs in their outreach to officials within their communities.

CBO outreach efforts in 2023 included:

- California Environmental Justice Alliance (CEJA) – Introduced to East Bay Community Energy (EBCE), which led to an interest call to discuss opportunities to collaborate. Additionally, CEJA introduced the PA to a representative from District 4 Councilmember, which led to an interest call to discuss the program on

February 1, 2023. CEJA also secured an introductory meeting with San Diego Community Power in December, in which the regional CCA representatives expressed interest in beginning a comarketing partnership.

- OC Goes Solar (OCGS) – Presented on the SOMAH Program during a Solarize Irvine Program presentation for the Irvine City Council on May 12, 2023. As a result, Councilmember featured a SOMAH blurb in her office's June newsletter and the Mayor provided a supportive quote. Additionally, SOMAH was connected to Orange County Power Authority (OCPA). OCPA was cemented as a co-marketing partner for SOMAH in October 2023.
- Self-Help Enterprises (SHE) – Presented to the City of Shafer council members and mayor on January 18, 2023. This presentation led to discussion on a partnership/sharing of logos for co-marketing opportunities.
- Environmental Health Coalition (EHC) – Direct outreach efforts to the National City, ideally to be added to the city council meeting agenda and advocate on behalf of SOMAH.

Challenges and Lessons Learned

Success in reaching an interested individual at a stakeholder office is a primary challenge when conducting this type of outreach. Furthermore, it is equally challenging to convince an interested stakeholder to co-market the SOMAH Program through their channels.

From experience, the PA has learned that cold emails to CCAs and government offices to start a partnership primarily do not result in responses. For instance, in 2023 SOMAH contacted 25 CCAs across PG&E, SCE and SDG&E service territories, which led to no responses. The successful connections with CCAs in 2023 came from preexisting relationships with CBOs and PA members. Similarly, government office communications initiated by SOMAH are more often unanswered than answered, eliminating most chances to further coordinate an interest call.

Additionally, when an interest call is successfully scheduled, and there is synergy between SOMAH and the stakeholder, the distribution of a SOMAH promotional piece by the stakeholder is not always successful. There are often hierarchies in decision-making or strict messaging guidelines that prevent stakeholders from co-marketing SOMAH. Since SOMAH has seen more success with ribbon-cutting attendance opportunities, reaching government offices for in-person opportunities remains the most effective route to stimulate interest in promoting the program through interviews conducted by the SOMAH PA. This type of interview content is particularly helpful as it is used on marketing materials and the SOMAH website to increase program legitimacy.

Priorities and Key Strategies for Audience

- *Seek out opportunities to reach many stakeholders at once*
In 2024, the SOMAH PA plans to increase program awareness among local governments through guest presentations and co-hosted webinars. Participation in these activities with a wide audience allows the SOMAH PA to develop multiple leads and connections to government entities that can be explored further in one-on-one outreach.
- *Provide stakeholders with additional support for potential action items when conducting outreach*
The SOMAH PA will continue to develop materials to help stakeholder partners promote the SOMAH Program within their communities. For example, the SOMAH PA will provide a list of options to government and legislative offices during initial engagement that can guide their promotion activities. This list will not limit ideas but will provide clear guidance to help connect direct outreach to direct action.
- *Leverage the success of completed SOMAH projects*
The SOMAH PA will use completed SOMAH projects as talking points to reach out to and connect with elected officials and government offices across the state. Outreach will continue to be prioritized in the Central Valley, PacifiCorp Utility and Liberty Utilities service territories, and DACs. The SOMAH PA will leverage the success of completed SOMAH projects by creating case studies and success stories per the second Triennial Third-Party Evaluation (2023).

SMARTIE Objective(s): All to be achieved by November 2024

1. Conduct direct outreach to 10 government or legislative offices where there are identified eligible properties to explore and secure co-marketing opportunities.
2. Work with new or existing energy efficiency industry partners to complete four co-branding or co-marketing efforts.
3. Work with investor-owned utilities (IOUs) to co-market SOMAH with tactics including direct outreach mailers to property owners (PacifiCorp and Liberty) and attending ribbon-cutting events (all).
4. Work with at least one stakeholder partner in a DAC to release a promotional piece about SOMAH.

2024 Audiences and Main KPIs

Audiences	Main KPIs
<ul style="list-style-type: none"> ● Investor-owned utilities (IOUs) ● Community choice aggregators (CCAs) ● Regional energy networks (RENs) ● Energy efficiency programs ● Government and legislative offices <ul style="list-style-type: none"> ○ City staff ○ County staff ○ Elected and appointed officials ● <i>Regional government associations such as San Diego Association of Governments (SANDAG) and Western Riverside Council of Governments (WRCOG)</i> 	<ul style="list-style-type: none"> ● Number of new engaged stakeholders contacted/added to Salesforce database ● Number of maintained partnerships (i.e., number of meetings with stakeholders with which the SOMAH PA has an existing partnership) ● Number of government staff taking action in support of SOMAH (i.e., social media posting, testimonial, letter of support) ● Number of co-marketing activities completed with multifamily energy efficiency programs ● Number of co-marketing efforts completed with IOUs ● Number of presentations given to intended audiences ● Percent of co-marketing activities focused in DACs ● Number of stakeholder websites promoting SOMAH ● Number of SOMAH web references by partners

Activities

No.	Activity	Channels/tools	Audience	Duration
5.1	Provide content for and maintain information on the Stackable Programs page of the SOMAH website.	<ul style="list-style-type: none"> ● CalSOMAH.org 	<ul style="list-style-type: none"> ● RENs ● Energy efficiency programs ● Government officials 	<ul style="list-style-type: none"> ● Q1-Q4 ● As needed
5.2	Present at sustainability events where stakeholders are present.	<ul style="list-style-type: none"> ● Virtual conferences, meetings and webinars ● In-person events 	<ul style="list-style-type: none"> ● Local governments ● Regional government associations 	<ul style="list-style-type: none"> ● Q1-Q4 ● Ongoing

			<ul style="list-style-type: none"> Energy efficiency programs 	
5.3	Share upcoming speaking events on social media channels.	<ul style="list-style-type: none"> Social media - organic 	<ul style="list-style-type: none"> All stakeholders 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
5.4	Support CBOs in their outreach through updated marketing materials.	<ul style="list-style-type: none"> CBO toolkit 	<ul style="list-style-type: none"> Local governments 	<ul style="list-style-type: none"> Q1-Q4 As needed
5.5	Provide regionally focused materials and content as requested by stakeholder to promote SOMAH within their communities.	<ul style="list-style-type: none"> Partner toolkit 	<ul style="list-style-type: none"> All stakeholders 	<ul style="list-style-type: none"> Q1-Q4 As needed
5.6	Extend invitations to ribbon-cuttings to elected officials and local government staff.	<ul style="list-style-type: none"> Events 	<ul style="list-style-type: none"> Local governments 	<ul style="list-style-type: none"> Q1-Q4 As needed

Evaluation and reporting

Since SOMAH's launch in July 2019, the SOMAH PA has collected data on program metrics and key performance indicators (KPIs) outlined in annual ME&O Plans. Rather than providing individual KPIs by activity, a set of KPIs is established for each ME&O goal and its objectives to assess more directly the SOMAH PA's success in achieving each goal. For 2024, the SOMAH PA will continue to conduct existing evaluation tactics to track the success and impact of ME&O efforts. The SOMAH PA will evaluate 2024 ME&O efforts by:

1. Surveys and focus groups of SOMAH's audiences.
2. Quarterly internal KPI reviews and tracking.
3. Semiannual Progress Report data and narrative reporting.
4. Ensuring key recommendations from SOMAH's Phase II Third-Party Evaluation are being thoughtfully addressed through ME&O efforts.

Additionally, the SOMAH PA will continue to gather feedback through other program efforts such as webinars and public forums to improve upon ME&O approaches and the SOMAH Program overall. SOMAH's Advisory Council, Job Training Organization Task Force and CBO partners also continue to provide guidance and oversight of the program's implementation, which includes ME&O strategies.

Surveys and Focus Groups

The SOMAH PA will continue to implement surveys and focus groups for property owners, tenants, contractors and job trainees as part of ongoing evaluation efforts to better understand their experiences accessing and participating in SOMAH. Results and findings from surveys and focus groups will continue to inform updates and modifications to ME&O strategies and tactics, mainly around communication and messaging as well as materials. These surveys and their methodologies account for different outreach needs and approaches to each intended audience. Surveys and focus groups for each major audience occur at different times throughout the year, and key findings from these will be shared via reporting processes like the Semiannual Progress Report.

Quarterly KPIs

Over the course of 2024, the SOMAH PA will continue to review, update and finalize internal KPIs across ME&O objectives and program areas — seeing where there are information gaps and gaining better insights about the program's progress. On a quarterly basis, the SOMAH PA will review KPI outcomes from the previous quarter. This review serves as an opportunity to shift or adjust ME&O efforts for the upcoming quarter(s) based on the efficacy demonstrated in the KPIs.



Semiannual Progress Report

SOMAH is required to report on program progress and key metrics semiannually via the Semiannual Progress Report in January and July each year. This report is comprehensive and includes ME&O progress and milestones as well as application statistics, Technical Assistance, DAC participation statistics and program planning and development updates.

Phase II Third-Party Evaluation

SOMAH's Phase II Third-Party Evaluation process was completed in June 2023. The SOMAH PA continues to integrate the findings and recommendations of that evaluation into ME&O strategies and tactics. The SOMAH PA also continues to regularly meet with the CPUC to identify opportunities to incorporate key recommendations into the program's ME&O efforts for 2023 and beyond. These opportunities for updates have been implemented throughout this document in the overarching strategies, goals, activities and tactics for 2024 ME&O efforts. (See <https://www.cpuc.ca.gov/somah> "Evaluation Reports" section for final responses to recommendations).

Appendix I: 2024 ME&O Plan Budget Forecast²²

		Total		
Category	Subtask	Labor	Non-Labor	Category Total
Marketing and Outreach	ME&O Admin	\$519,073	\$0	\$519,073
Marketing and Outreach	Website Development & Enhancements	\$71,736	\$10,030	\$81,766
Marketing and Outreach	Community Based Organization	\$277,872 ²³	\$524,300	\$802,172
Marketing and Outreach	Cooperative Marketing Efforts	\$98,988	\$0	\$98,988
Marketing and Outreach	Conferences	\$30,259	\$10,700	\$40,959
Marketing and Outreach	Tenant Engagement	\$131,556	\$3,000	\$134,556
Marketing and Outreach	Property Owner Engagement	\$303,434	\$6,600	\$310,034
Marketing and Outreach	Contractor Engagement	\$54,518	\$0	\$54,518
Marketing and Outreach	Contractor Training	\$16,014	\$0	\$16,014
Marketing and Outreach	Marketing Collateral Development	\$163,622	\$4,415	\$168,037
Marketing and Outreach	Communications	\$46,227	\$1,300	\$47,527
Marketing and Outreach	Media	\$140,832	\$27,680	\$168,512
Marketing and Outreach	ME&O Plan Development	\$60,199	\$0	\$60,199
Workforce Development	Cooperative Marketing Efforts	\$29,815	\$1,000	\$30,815
	Totals	\$1,944,146	\$589,025	\$2,533,171

²² In 2023 the MEO Plan's forecasted budget was \$3,005,734

²³ This includes 1 FTE that manages CBO contracts, invoicing, and coordinates across approximately ~6 additional SOMAH PA staff who are working with CBO partners. Also includes labor costs for the additional SOMAH PA staff that are working and sharing scopes/activities with CBO partners.