



Solar on Multifamily
Affordable Housing

SOMAH

Semiannual Progress Report

Reporting Period
July 1, 2025 – December 31, 2025

Table of Contents

1. Executive Summary	6
2. Background	7
2.1 Application Pathways: Track A and Track B.....	8
2.2 Eligibility Options: Income-Qualified, Disadvantaged Communities, Tribal Ownership, and Public Housing Authority	10
2.3 Program Budget	10
2.3.1 Program Administrative Budget	11
2.3.2 Program Incentive Budget	11
3. Program Progress — Key Performance Areas.....	16
3.1 Program Administration	16
3.1.1 Applications and Incentive Statistics	16
3.1.2 Program Payments.....	48
3.1.3 Bidding Process	52
3.1.4 Eligible SOMAH Properties Map	53
3.1.5 California Distributed Generation Statistics	55
3.2 Marketing, Education, and Outreach (ME&O)	55
3.2.1 ME&O Plan	56
3.2.2 Monitoring, Evaluation and Research	56
3.2.3 Contractors	57
3.2.4 Property Owners	62
3.2.5 Tenants.....	66
3.2.6 Stakeholders.....	68
3.3 Workforce Development	69
3.3.1 Local Hiring and Job Training Data	70
3.4 Community-Based Organizations	77
3.5 Technical Assistance	80
3.5.1 TA and Support Services	81
3.5.2 Upfront Technical Assistance	83
3.5.3 Fleet Monitoring	87
4. Program Planning and Development.....	90
4.1 Reporting, Feedback and Accountability Mechanisms	91
4.1.1 Public Forums	91
4.1.2 IOU Working Group	91
4.1.3 SOMAH Advisory Groups	92
4.1.4 Third-Party Program Evaluation	93
4.2 Program Design and Updates.....	94



4.2.1	Decision 24-11-006	94
4.2.2	Program Handbook Records	96
5.	Conclusions.....	99
6.	Appendix A	100



Figure 1 – Application Steps (*Includes Optional Upfront Technical Assistance)	9
Figure 2 – Total Program Administrative Expenditures by Category	11
Figure 3 – Project Capacity and Budget	13
Figure 4 – Cumulative Program Budget	15
Figure 5 – Application Status by IOU Territory since Program Start.....	17
Figure 6 – Cumulative Applications Received	20
Figure 7 – Current Milestones by IOU Territory	25
Figure 8 – Percentage of Active Applications by Milestone and Territory	26
Figure 9 – Applications by Incentive Track since Program Start	27
Figure 10 – Overall Property Eligibility Pathways.....	28
Figure 11 – Property Eligibility by Incentive Track	29
Figure 12 – Property Eligibility by Reservation Status since Program Start	30
Figure 13 – Property Eligibility by DAC/Tribal Ownership Status since Program Start	31
Figure 14 – System Ownership Type	34
Figure 15 – System Ownership Type by Property Eligibility.....	35
Figure 16 – Application Reservation Status by Incentive Track	36
Figure 17 – Average System Size (kW) by Reservation Status	38
Figure 18 – Average Energy Storage System Size (kW) by Reservation Status.....	39
Figure 19 – Average PV System Size (kW) by IOU Territory and Reservation Status	39
Figure 20 – Average Energy Storage System Size (kW) by IOU Territory and Reservation Status.....	40
Figure 21 – Distribution of System Sizes (kW).....	40
Figure 22 – Distribution of Energy Storage System Sizes (kW)	41
Figure 23 – Progress to 300 MW	43
Figure 24 – Percentage of Program MW by Reservation Type	43
Figure 25 – Active Project Density and Location Visualizations.....	46
Figure 26 – Completed Project Density and Location Visualization	47
Figure 27 – Program Payment Statistics.....	50
Figure 28 – Eligible SOMAH Properties Map	54
Figure 29 – Completed and Planned Surveys by Category	57
Figure 30 – Points of Interaction with Potential Contractor Applicants	58
Figure 31 – Number of Eligible Contractors Over Time	59
Figure 32 – Eligible Contractor Statistics	60
Figure 33 – Active Contractor Diversity	61
Figure 34 – Subcontractor Statistics	62
Figure 35 – Points of Interaction with Potential Property Owner Applicants	63
Figure 36 – Social Media Followers	65
Figure 37 – Property Owner Subscribers Over Time.....	66



Figure 38 – Job Trainee Race/Ethnicity Breakdown.....	72
Figure 39 – Job Trainee Gender Breakdown	73
Figure 40 – Highest Level of Job Trainee Education	74
Figure 41 – Percentage of Trainee Placements by Project Role	75
Figure 42 – Average Trainee Wage Compared to CA Minimum Wage	75
Figure 43 – Hours per Job Trainee Placement	76
Figure 44 – Percentage of Trainee Placements by Employment Status.....	77
Figure 45 – Points of Interaction with Potential Property Owner Applicants	78
Figure 46 – Technical Assistance Preview Report Request Summary	82
Figure 47 – Breakdown of TA and Support Service Request Types	83
Figure 48 – Track A Summary.....	87
Figure 49 – Estimated Versus Actual System Performance	89
Figure 50 – Completed SOMAH Systems Being Monitored	90
Figure 51 – Handbook Versions	97



1. Executive Summary

Covering the second half of 2025, this 13th Solar on Multifamily Affordable Housing (SOMAH) Program Semiannual Progress Report (SAPR) celebrates six years of program accomplishments. This report highlights a continued increase in projects, with 103 total application submissions in the second half of 2025, along with steady use of the Affordability Prescreen service and Progress Payment Pathway milestone, progress on system performance monitoring, and the introduction of energy storage incentives. Marketing efforts continue to focus on property owners and contractors — building awareness, strengthening participation pathways, and reducing program barriers — to drive application volume and help SOMAH achieve its goals.

The second half of 2025 continued to have a large influx of applications, totaling 98 new applications submitted. This is 35 more applications than were submitted in Q1-Q2 2025. New applications received during this reporting period that remained active through the end of Q4 added 14.29 MW capacity toward the program's 300 MW goal. Six of these applications were Track A applications, and five were prescreen conversions to application submittal. The Affordability Prescreen service helped identify 11 SOMAH Eligible properties and one ineligible potential project prior to a formal application submission.

Additional funding was released for Pacific Gas and Electric Company (PG&E), Liberty Utilities, and PacifiCorp Utilities Company. And throughout the reporting period, the program continued to maintain plentiful funding for all investor-owned utility (IOU) territories with immediate application review and no waitlists.

The second half of 2025 saw a decline in extension request submittals compared to the first half of 2025, falling from 156 to 106. The significant wave of project completions will continue into 2026, as another 59 inspections were completed in the second half of 2025.

The SOMAH Program Administrator (PA) continues to focus on participant needs and challenges while striving to implement a resilient and successful program. During this reporting period, the SOMAH PA implemented program changes directed by California Public Utilities Commission (CPUC) Decision (D.)24-11-006, the most notable being the rollout of incentivized integrated energy storage systems. Storage is identified in D.24-11-006 as a technology that, when paired with solar, can further maximize support for tenants via tenant bill savings and provide other positive grid impacts such as resiliency and reliability.



During the second half of 2025, marketing, education, and outreach (ME&O) efforts focused on changes implemented by D.24-11-006. Tactics and messaging around program changes to property owners and contractors were prioritized to increase applications, with a greater focus on outreach in Liberty and PacifiCorp utility territories. Marketing highlighting storage incentives and the new Early Payment Pathway for tribes helped increase interest in SOMAH and drive application submissions. Tenant education and workforce development played a key role in outreach with in-person and virtual events. Also, stakeholder outreach focused on co-marketing collaboration with SOMAH IOUs and government offices in Liberty and PacifiCorp territories.

Community-based organizations (CBOs) continue to be strong partners for SOMAH, assisting in outreach and as advisors serving multiple audiences and the SOMAH PA. CBO partners led and participated in numerous in-person events that highlighted the program's community and workforce benefits to property owners, tenants, local stakeholders, and other decision-makers. They also had success meeting property owners at conferences and hosting events as well.

2. Background

The SOMAH Program provides financial incentives for installing photovoltaic (PV) energy systems on multifamily affordable housing. The program is designed to deliver clean power and credits on energy bills to hundreds of thousands of California's affordable housing residents. The program was created as the Multifamily Affordable Housing Solar Roofs Program by California Assembly Bill (AB) 693 (Stats. 2015, Ch. 582), authored by former State Senator Susan Talamantes Eggman (D-District 05) (then Assemblymember) and signed by Governor Jerry Brown in 2015. Senate Bill (SB) 92 (Stats. 2017, Ch. 26), adopted with the 2017-18 State Budget, further clarified the funding for the program. CPUC D.17-12-022 (effective Dec. 14, 2017) implemented AB 693 and changed the name of the program to the Solar on Multifamily Affordable Housing (SOMAH) Program to distinguish it from other state clean energy and low-income solar programs. D.17-12-022 established the program's budget, incentive structure, and eligibility policies, among other items. California Senate Bill 355 (SB 355) further modified the program in October 2023, extending the program through 2032 and implementing several modifications to expand program eligibility.

The SOMAH Program serves electric utility and community choice aggregator (CCA) customers in the territories of Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), San Diego Gas & Electric Company (SDG&E), Liberty Utilities Company, and PacifiCorp. Funded through greenhouse gas (GHG) allowance



auction proceeds, SOMAH has a program budget of up to \$100 million annually for 10 years and an overall target to install at least 300 megawatts (MW) of generating capacity by December 31, 2032. Although it does not impact the program's overall target to install at least 300 MW of generating capacity, CPUC D.24-11-006, (effective November 7, 2024) allows incentives for storage equipment integrated with the solar generating equipment.

The program is designed to be transparent and accountable to the communities it serves. It is administered by a team of nonprofit organizations that provide a host of no-cost services to maximize participation and community benefits. These services include comprehensive Technical Assistance and Support Services for property owners and contractors, tenant education resources, and job training opportunities. An Advisory Council of community advocates provides input into program implementation and helps ensure the program maximizes benefits to the communities it is designed to serve. The SOMAH Program is jointly administered by the Association for Energy Affordability (AEA), Center for Sustainable Energy® (CSE) and GRID Alternatives, in collaboration with the California Housing Partnership and rotating CBOs. The California Public Utilities Commission (CPUC) oversees the SOMAH Program.

2.1 Application Pathways: Track A and Track B

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

¹ EPBB incentives are based on the system's capacity and design, which provide an estimate of the system's future performance. Per D.24-11-006 and effective as of November 14, 2024, the EPBB calculator was suspended for all future and active applications in Liberty and PacifiCorp territories, tribal applications in the PG&E territory, as well as PG&E projects located at or above one minute south of the 39th parallel.



Track A is designed to provide Upfront Technical Assistance (TA) services for property owners who need support with understanding if solar is right for their property. SOMAH's Technical Assistance and Support Services provide a well-rounded understanding of a property's energy needs as well as access to educational, technical, and financial resources that facilitate valuable energy efficiency upgrades and solar installations. Participants who select Track A have their incentive funding earmarked for the duration of the Upfront TA period, prior to submitting a reservation request. Participants in Track A who have not identified a solar contractor, are guided through a bid solicitation process to select an eligible solar contractor for their project.²

Track B is designed for property owners who receive direct program marketing and outreach from an eligible contractor, project developer, or similar entity. Projects on this track have already identified an eligible solar contractor who has performed, or will provide, client assessment and design services, which may include a solar site assessment, initial design, financing options review, contract review, etc. Track B projects can request to receive the program's suite of Technical Assistance and Support Services as needed and at any stage of their project. These are further described in Section 3.4, Technical Assistance.

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

Figure 1 – Application Steps (*Includes Optional Upfront Technical Assistance)



² Per D.24-11-006, the multiple bid requirement for Track A projects was removed.



2.2 Eligibility Options: Income-Qualified, Disadvantaged Communities, Tribal Ownership, and Public Housing Authority

Regardless of the application track selected, properties qualify for the SOMAH Program in four ways: Income-Qualified, Disadvantaged Communities, Tribal Ownership, and Public Housing Authority.³ A property may be eligible by meeting at least one of the requirements. All properties must also be at least five rental units and meet the definition of deed-restricted, affordable housing in Public Utilities Code Section 2852(A)(3)(a)(i). Income-Qualified refers to properties where at least 66% of the units are reserved for households at or below 80% of the area median income (AMI). Disadvantaged Communities refer to properties located in a disadvantaged community (DAC) as identified by CalEnviroScreen and the California Environmental Protection Agency (CalEPA). Tribal Ownership refers to properties owned by a California Native American tribe that is on the contact list maintained by the Native American Heritage Commission. Public Housing Authority refers to rental housing properties owned by a public housing authority or public housing agency. See Section 3.1.1, Applications and Incentive Statistics for more information on qualification options for the SOMAH Program.

2.3 Program Budget

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

³ Effective with Handbook 8 in February 2024, properties now qualify for SOMAH via four eligibility criteria. Prior to Handbook 8, projects could only qualify for SOMAH through two eligibility options: either low income or being in a disadvantaged community.



2.3.1 Program Administrative Budget

The administrative budget is shared by the SOMAH PA, CPUC Energy Division, and the IOUs. The SOMAH PA tracks the program expenses in four main categories: SOMAH Program Administration; Marketing, Education, & Outreach (ME&O); Technical Assistance; and Workforce Development. Figure 2 provides a snapshot from the SAER and outlines total program administrative expenditures through December 31, 2025.

Figure 2 – Total Program Administrative Expenditures by Category

Category	
SOMAH Program Administration	\$27,208,995
SOMAH Marketing, Education, & Outreach (ME&O)	\$17,709,668
SOMAH Workforce Development	\$2,881,543
SOMAH Technical Assistance	\$2,796,755
SOMAH Evaluation Expenses ⁴	\$1,277,328
Investor-Owned Utility (IOU) Expenses	\$7,850,332
Total	\$59,724,622

More detailed expenditure information can be found at [California Distributed Generation Programs](#).⁵

2.3.2 Program Incentive Budget

The SOMAH PA publishes updated program incentive budget information for each IOU territory to the California Distributed Generation Statistics [website](#) weekly.⁶ Because each IOU territory's annual incentive budget varies based on specific GHG allowance auction proceeds, the SOMAH PA maintains five individual application queues and up to five waitlist queues, when applicable. The funds for each utility territory may be released at separate times, with the collections based on each utility's Energy Resource Recovery Account (ERRA) or Energy Cost Adjustment Clause (ECAC). PG&E and

⁴ Prior to January 2022, Energy Division staffing costs were included in error under "SOMAH California Public Utilities Commission (CPUC) Expenditures." CPUC Energy Division staff overseeing SOMAH implementation are not funded through the SOMAH Program. Historical amounts are amended to show the expenditures directed by CPUC Energy Division staff to be spent on evaluation activities that are funded by SOMAH Program administration funds.

⁵ Detailed expenditure information may be accessed in the SOMAH Semiannual Expense Report: <https://www.californiadgstats.ca.gov/programs/>.

⁶ Program incentive budget information for each IOU territory: https://www.californiadgstats.ca.gov/programs/somah_budget/.



PacifiCorp funding is released quarterly versus the annual lump sum release for other territories.

The following utility territories released funding during the second half of 2025: PG&E (December 2025), Liberty Utilities (October 2025), and PacifiCorp Utilities (December 2025). Figure 3 summarizes the committed and remaining budget for the SOMAH Program. Figure 4 summarizes the program dollars collected by fiscal year to date for all five IOUs, including the Q4 releases mentioned above, and identifies application totals and available program funds.



Figure 3 – Project Capacity and Budget

		Waitlist		Earmarked		Pending Reservation		Reserved	
		Capacity	Budget	Capacity	Budget	Capacity	Budget	Capacity	Budget
		(MW)	(\$)	(MW)	(\$)	(MW)	(\$)	(MW)	(\$)
PG&E	Track A	0	0	2.057	6,031,010	0	0	0.823	2,290,151
	Track B	0	0	0	0	2.333	5,609,572	35.684	74,052,384
	Total	0	0	2.057	6,031,010	2.333	5,609,572	36.507	76,342,535
SCE	Track A	0	0	0.457	1,460,979	0	0	0.144	246,239
	Track B	0	0	0	0	2.350	5,248,188	22.416	46,997,836
	Total	0	0	0.457	1,460,979	2.350	5,248,188	22.560	47,244,075
SDG&E	Track A	0	0	0.138	443,089	0	0	0	0
	Track B	0	0	0	0	0.081	190,206	7.800	14,175,628
	Total	0	0	0.138	443,089	0.081	190,206	7.800	14,175,628
PacifiCorp	Track A	0	0	0	0	0	0	0	0
	Track B	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0
Liberty Utilities	Track A	0	0	0	0	0	0	0	0
	Track B	0	0	0	0	0	0	0.055	120,170
	Total	0	0	0	0	0	0	0.055	120,170
TOTAL	Track A	0	0	2.652	7,935,078	0	0	0.967	2,536,390
	Track B	0	0	0	0	4.764	11,047,966	65.955	135,346,019
	Total	0	0	2.652	7,935,078	4.764	11,047,966	66.922	137,882,408

Figure 3 continues on the next page.



		Completed		PV Application Totals		Storage Application Totals		Total Budget (\$)	Remaining Budget (\$)
		Capacity	Budget	Capacity	Budget	Capacity	Budget		
		(MW)	(\$)	(MW)	(\$)	(MW)	(\$)		
PG&E	Track A	0.148	264,801	3.028	8,585,962	0	0	310,873,030	164,963,608
	Track B	25.638	49,167,121	63.655	128,829,077	3.924	8,494,383		
	Total	25.786	49,431,922	66.683	137,415,039	3.924	8,494,383		
SCE	Track A	0.351	1,079,669	0.952	2,786,887	0	0	382,971,842	293,456,024
	Track B	15.695	28,959,684	40.461	81,205,709	1.913	5,523,222		
	Total	16.046	30,039,353	41.413	83,992,596	1.913	5,523,222		
SDG&E	Track A	0	0	0.138	443,089	0	0	98,387,648	72,449,405
	Track B	5.878	10,912,630	13.759	25,278,464	0.077	216,690		
	Total	5.878	10,912,630	13.897	25,721,553	0.077	216,690		
PacifiCorp	Track A	0	0	0	0	0	0	11,578,353	11,578,353
	Track B	0	0	0	0	0	0		
	Total	0	0	0	0	0	0		
Liberty Utilities	Track A	0	0	0	0	0	0	3,020,427	2,900,257
	Track B	0	0	0.055	120,170	0	0		
	Total	0	0	0.055	120,170	0	0		
TOTAL	Track A	0.499	1,344,470	4.118	11,815,938	0	0	806,831,300	545,347,647
	Track B	47.211	89,039,435	117.930	235,433,420	5.914	14,234,295		
	Total	47.710	90,383,905	122.048	247,249,358	5.914	14,234,295		

In Figure 3, PV Totals include capacity and budget values for Earmarked, Pending Reservation, Reserved, and Completed projects but do not include storage totals. Storage Totals include capacity and budget values for Earmarked, Pending Reservation, Reserved, and Completed projects.



Figure 4 – Cumulative Program Budget

	2016 Budget (\$)	2017 Budget (\$)	2018 Budget (\$)	2019 Budget (\$)	Under- Collections True-up (\$)	2020 Budget (\$)	2021 Budget (\$)	2022 Budget ⁷ (\$)	2023 Budget (\$)	2024 Budget (\$)	2025 Budget (\$)	Application Totals (\$)	Total Budget (\$)	Remaining Budget (\$)
PG&E	1,740,992	4,359,110	39,330,000	33,963,300	31,620,584	34,898,605	28,448,281	41,600,106	38,400,027	25,348,294	31,163,731	145,909,422	310,873,030	164,963,608
SCE	2,733,251	4,536,050	41,400,000	30,581,476	45,542,591	20,410,891	57,569,657	66,028,108	43,839,644	25,142,074	45,188,100	89,515,818	382,971,842	293,456,024
SDG&E	0	0	9,270,000	9,104,076	11,343,785	10,294,957	9,831,156	18,524,768	13,454,945	4,296,389	12,267,572	25,938,243	98,387,648	72,449,405
PacifiCorp	422,443	961,291	1,009,512	1,150,528	0	1,177,394	1,090,332	1,512,862	1,606,391	1,666,073	981,527	0	11,578,353	11,578,353
Liberty Utilities	132,440	258,329	314,706	419,517	0	326,327	300,128	401,608	299,170	568,202	TBD	120,170	3,020,427	2,900,257
TOTAL	5,029,126	10,114,780	91,324,218	75,218,897	88,506,960	67,108,174	97,239,554	128,067,452	97,600,177	57,021,032	89,600,930	261,483,653	806,831,300	545,347,647

⁷ D.22-09-009 modified D.17-12-022 for the SOMAH forecast budgeting process. Each IOU can propose to set aside their proportionate share of \$100 million for SOMAH, if they adequately show that the IOUs' collective revenue will exceed \$100 million. The SOMAH PA releases funds based on the IOUs' set-asides, then trues-up the final three months of the year once the IOUs submit their Joint Advice Letter.



3. Program Progress — Key Performance Areas

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

3.1 Program Administration

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

3.1.1 Applications and Incentive Statistics

SOMAH continues to have ample funding available in all five IOU territories, with an available incentive budget of more than \$545.35 million across the program for this reporting period. No IOU territory has had a waitlist since Q4 2020 (SDG&E). Stakeholders and interested applicants should refer to the program funding page on CalSOMAH.org for up-to-date information on recently released and available funding per territory and can subscribe to the SOMAH email list for real-time notifications when additional funding is released.

There are two main ways for previously allocated funds to become available for other projects. First, a project may be canceled by the SOMAH PA due to missed deadlines or failure to meet program eligibility requirements or be voluntarily withdrawn by the applicant or host customer. Second, incentive funds may become available as a result of application review. For example, an applicant's adjustments to the system size after receiving consumption data from the IOU typically affects the reserved incentive amount. The SOMAH PA has observed that nearly all projects will adjust their system size after receiving site consumption data during the Reservation Request Milestone (or during Upfront TA for Track A projects), therefore, modifying the requested incentive with the system size adjustment. With adjustments like this, the previously allocated funds are then returned to the pool of available funding or applied to waitlisted projects (when applicable) through an ongoing reconciliation process by the SOMAH PA. Similarly, the program maintains a small buffer in each territory's budget to



accommodate potential increases in system sizes and incentive amounts resulting from consumption data from the IOU, anticipated future load additions, Solar Sizing Tool recommendations, or other reasons.

The lack of a method for applicants to easily retrieve tenant consumption data before submitting a program application has historically resulted in a longer reservation request review timeline. During Q3 and Q4 2025, the PA has continued improving the process of retrieving consumption data through leveraging increased communication and improved formatting in the data request process to shorten the reservation request review timeline. Application streamlining efforts have been included in each of the approved handbook versions starting in 2022 with Handbook 5. Historical information on SOMAH's handbook updates is outlined below and in Section 4.2.2, Program Handbook Records.

Figure 5 – Application Status by IOU Territory since Program Start

Program	Active	Complete/ Incentive Paid	Canceled/ Withdrawn	Total
PG&E	260	243	264	767
SCE	131	97	116	344
SDG&E	54	48	61	163
Liberty Utilities	1	0	1	2
PacifiCorp	0	0	1	1
Total	446	388	443	1277

N = 1,277

Of the 103 total applications submitted between July and December 2025, 98 remain active at the close of the reporting period, a decrease of 13.4% from the January through June 2025 reporting period during which 95 of the 119 applications submitted remain active. Application submissions throughout this reporting period were steady with large spikes in July (31 submissions) and October (24 submissions). The increase in new applications was largely attributed to the program's newly expanded eligibility requirements and the PA's increased program engagement and re-engagement efforts.

Of the 98 active submitted applications from July through December 2025, 63 new applications were submitted in Q3, and 35 were submitted in Q4. Eight of the new applications were Track A projects, all were submitted in the larger IOU territories (PG&E, SCE and SDG&E), six were previously canceled re-entry applications, six participated in the Affordability Prescreen service, and 20 included integrated storage with the submittal.



Track A application submissions have remained steady since the last reporting period. This pace can be attributed to the SOMAH PA's coordination with other energy efficiency program administrators, increased use of the Technical Assistance and Support Services request form, and significantly increased popularity of the prescreen service. The prescreen service provides property owners who are unfamiliar with SOMAH the ability to submit applications with confidence by predetermining their eligibility for the program, providing them an introduction to PowerClerk and the SOMAH PA, and pre-generating their application number, allowing a smooth transition into the reservation request process.

SOMAH did not receive new applications in Liberty Utilities or PacifiCorp territories this reporting period, but the SOMAH PA looks forward to further engagement with the northern utilities with a goal to increase participation in these territories in 2026 and beyond.

One active application in the Liberty Utilities territory has reached the Proof of Project Milestone. However, a previously active application in PacifiCorp territory was canceled but plans to re-enter the program after resolving extenuating circumstances with site conditions and project planning.

As part of SOMAH's ME&O efforts in these territories, in November, the SOMAH PO team spoke about the program alongside city and county representatives from Yreka, Weed, and Modoc counties at the first annual Siskiyou-Modoc Virtual Housing Workshop. In addition, the PO team sent mailers to priority properties in the Liberty and PacifiCorp territories.

The PA has discussed program barriers and disadvantages in the northern multi-jurisdictional utilities. To address these issues, the SOMAH PA developed Technical Assistance Preview Reports in Q3 for the territories' likely eligible properties (as identified in the SOMAH property eligibility map), which included high-level system design details and the costs/benefits of pursuing solar for each potentially eligible property. The PA contacted the property owners individually in both the PacifiCorp and Liberty territories and provided them with a high-level Technical Assistance Preview Report, highlighting projected SOMAH benefits specific to their potential projects. In conjunction with new data from the IOUs, the PA narrowed down precise eligible property information in the PacifiCorp and Liberty territories and plans to build off this first round of outreach with an update to the Technical Assistance Preview Reports illustrating the impacts of removing the EPBB calculator for projects located in these two territories.

The total numbers of new applications (including both active and canceled applications) submitted in the previous reporting periods are as follows:

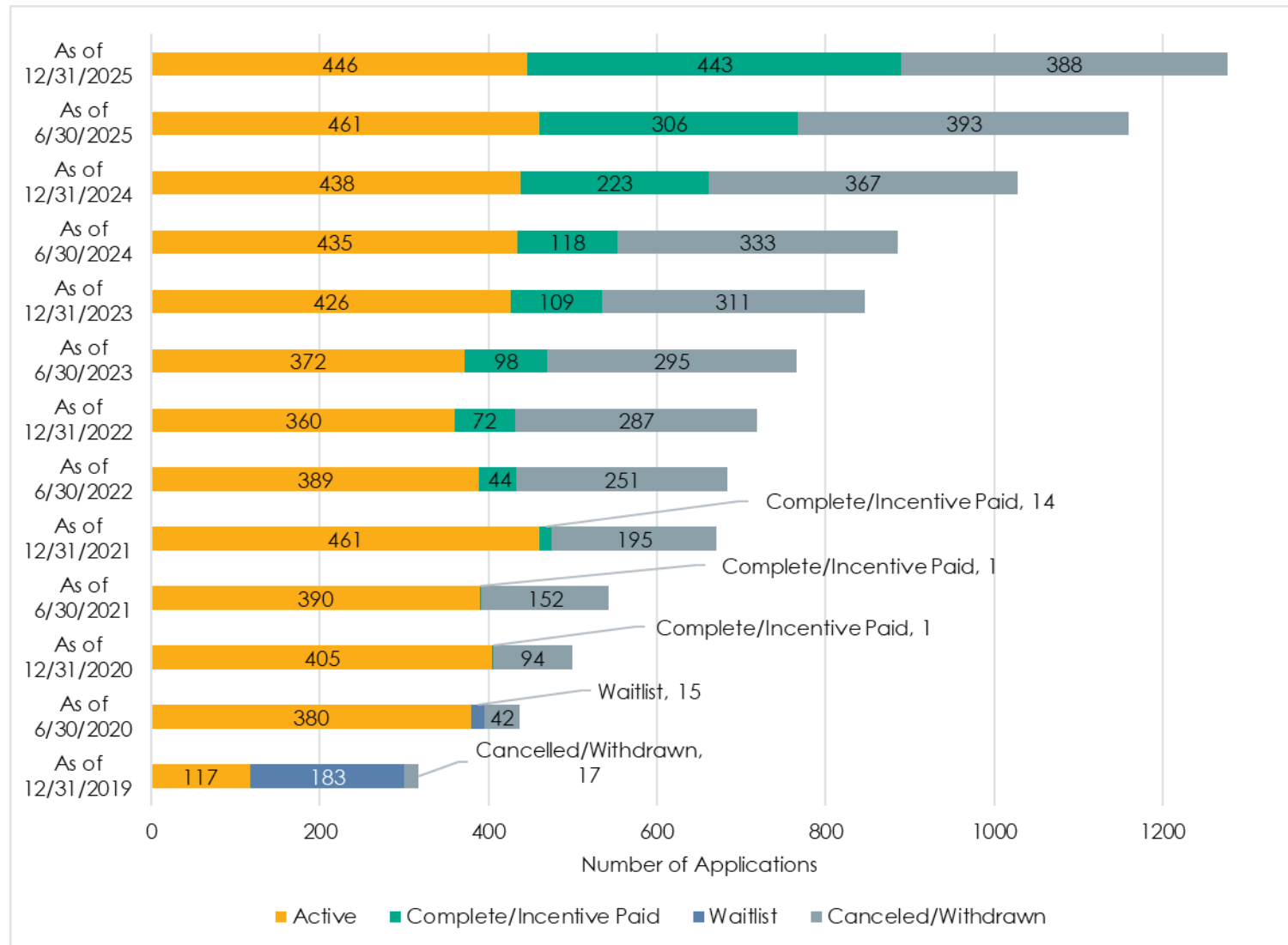


- July–December 2025: 103 new applications
- January–June 2025: 120 new applications
- July–December 2024: 147 new applications
- January–June 2024: 63 new applications
- July–December 2023: 81 new applications
- January–June 2023: 46 new applications
- July–December 2022: 35 new applications
- January–June 2022: 14 new applications
- July–December 2021: 127 new applications
- January–June 2021: 43 new applications
- July–December 2020: 63 new applications
- January–June 2020: 120 new applications
- July 2019–December 2019: 317 new applications

Total new application volume in the second half of 2025 remained on par with the high application volume seen at the beginning of the year, totaling 223 applications submitted in 2025. This total is a 5% increase compared to 2024 and nearly double the number of applications submitted in 2023 (127 total applications). The 2025 application volume is up 353.06% from the application slowdown in 2022 (49) and represents the second highest annual volume, only behind 2019 when the program initially opened to a wave of applications. The program continues to see application submittals throughout the year, with 2025 submissions peaking around 30 applications a month.

Third-party evaluations (2020 Phase I SOMAH Process and Impact Assessment Report, 2021 Phase II Evaluation Report, and 2023 Triennial SOMAH Evaluation Report) highlight the importance of pipeline management, which continues to be a key focal point for the SOMAH PA. Pipeline management efforts aim to increase and maintain program participation with continued new application submissions to meet the program's 300 MW goal. Section 3.2, Marketing, Education, and Outreach includes more information about SOMAH's ME&O efforts on pipeline management and increasing program participation and diversity.

Figure 6 – Cumulative Applications Received





In November 2022, the SOMAH PA launched the Affordability Prescreen service, which provides potential participants with a high-level review of a property's regulatory documentation prior to submitting a formal application through the application portal, PowerClerk. The opportunity to prescreen properties for SOMAH eligibility alleviates a significant administrative burden for both applicants and application assignees. Through this resource, participants can establish communication with the SOMAH PA that helps overcome initial application questions and build rapport prior to application submission. By using additional supportive measures, such as the Affordability Prescreen service and SOMAH's suite of Technical Assistance and Support Services, quality leads with viable projects are better able to submit program applications in PowerClerk. See Section 3.2.4, Property Owners for more information.

With more prescreen requests and the SOMAH PA's desire to streamline the application process, the Affordability Prescreen process migrated to PowerClerk in June 2024. This enhancement integrated the popular service into the same platform as the program application. Potential applicants can now submit a prescreen request directly through PowerClerk using the VersaForm feature. Unlike the previous iteration of this service, the VersaForm feature does not require a PowerClerk account for submission, further minimizing administrative burden on potential applicants. An additional goal of this process improvement is to increase familiarity with PowerClerk, further encouraging eligible prescreens to convert to an active SOMAH application. Once the prescreen request is deemed eligible, relevant data is automatically copied into the new SOMAH application in the appropriate utility territory, ultimately reducing the applicant's required data entry.

Since implementing the Affordability Prescreen service at the end of 2022, the process has proven effective in reducing administrative burden for both applicants and the SOMAH Program Administrator by identifying ineligible projects before they enter the application pipeline. To date, 86 prescreen entries have converted into active SOMAH applications, while 77 properties were identified as ineligible, resulting in zero application cancellations due to regulatory documentation ineligibility after submission.

Prescreen data is tracked to record project conversion rates into active applications and to identify eligible projects that may benefit from further marketing, education, and outreach efforts. Common reasons for ineligibility include expired deed restrictions or having less than 10 years remaining in their compliance period, as well as lack of information within the document to locate the property.

This reporting period followed a similar trend to the previous period, with a continued decrease in prescreens deemed "eligible with income affidavit." This decrease directly



correlates with the Handbook 8 update expanding SOMAH's affordability requirements and the option to use an income affidavit confirming the property meets the affordability requirements even if not explicitly stated or confirmed in the regulatory agreement. The volume of prescreens and throughput to new application submissions is as follows:

- July 2025–December 2025: 17 prescreens processed
 - 10 eligible, 1 eligible with income affidavit, 1 ineligible
- January 2025–June 2025: 34 prescreens processed
 - 20 eligible, 1 eligible with income affidavit, 10 ineligible
- July 2024–December 2024: 46 prescreens processed
 - 25 eligible, 2 eligible with income affidavit, 19 ineligible
- January–June 2024: 31 prescreens processed
 - 14 eligible, 1 eligible with income affidavit, 16 ineligible
- July–December 2023: 27 prescreens processed
 - 8 eligible, 4 eligible with income affidavit, 15 ineligible
- January–June 2023: 49 prescreens processed
 - 18 eligible, 9 eligible with income affidavit, 22 ineligible
- September–December 2022: 34 prescreens processed
 - 25 eligible, 3 eligible with income affidavit, 6 ineligible

Applicants and property owners have also shared valuable feedback for projects that have chosen not to or are unable to move forward with the SOMAH Program after initial application submission. The SOMAH PA solicits additional details from all canceled and withdrawn applications for tracking and reporting efforts. This feedback has helped the SOMAH PA address eligibility challenges and barriers to program participation via program handbook changes. Additionally, this cancellation feedback has allowed the SOMAH PA to prioritize outreach to potentially “recoverable” canceled applications to determine if their needs can be addressed to facilitate future participation. This outreach is discussed further in Section 3.2.4, Property Owners. Applicant and SOMAH PA combined efforts resulted in six previously canceled applications re-entering the program in the second half of 2025.

The SOMAH PA maintains consistent communication with SOMAH contractors who have active applications to understand their project timelines and potential barriers. This interface with contractors and program participants also helps support forecasting efforts for program activities as well as tailor project assistance for unique application situations. Over the past year, as application activity picked up for 18-month reservation expiration due dates, extension requests for the Incentive Claim Package deadline remained consistent with 54 extension requests received in Q3 and 52 extension



requests received in Q4. As active projects continue and new projects enter the queue, estimated construction timelines become more accurate, which contributes to the decrease in extension requests for each reporting period. Below is a breakdown of Incentive Claim Package deadline extensions submitted in the previous reporting periods:

- July 2025–December 2025: 106 new extension requests processed
- January 2025–June 2025: 157 new extension requests processed
- July 2024–December 2024: 207 new extension requests processed
- January–June 2024: 322 new extension requests processed
- July 2023–December 2023: 251 new extension requests processed
- January 2023–June 2023: 243 new extension requests processed
- July 2022–December 2022: 171 new extension requests processed
- January 2022–June 2022: 98 new extension requests processed
- July 2021–December 2021: 24 new extension requests processed

It is important to note that “new extension requests” refer to the number of extension requests submitted, not the number of applications that received extensions. All applications may submit more than one extension request throughout their application timeline. Each extension request is reviewed and approved on a case-by-case basis. From start to completion, the average length of an Incentive Claim Package deadline extension request is 174 days. The maximum extension term per request is 180 days. Like previous reporting periods, most extension requests cite one of two reasons: 1) changes to the original design layout or funding of the project; or 2) problems in the permitting or interconnection process that caused a delay. Utility-related delays, such as long interconnection timelines, difficulty scheduling shutdowns and meter releases, and inspection delays, were cited at varying levels of frequency. Despite these extensions, the program continues to consistently complete and pay out projects.

The SOMAH PA uses application milestone deadlines and construction timelines to assess the progress of the application queue and for broader program planning, such as project completion estimates. In the first application step, the Reservation Request Milestone, the applicant is required to enter the project's projected (if not yet initiated) or actual (if commenced) construction start date. This information helps identify where the project is in the life cycle of installation when the SOMAH application is submitted. While the construction and interconnection processes are bifurcated from the SOMAH incentive application, the timing of installation and interconnection directly relate to the project's ability to submit for the incentive claim and progress payment. After receiving reservation approval, at the start of each milestone (Energy Efficiency Compliance, Proof of Project, and Incentive Claim) applicants are prompted to report if construction has started or, if not, update the projected construction start date. As of



Q1 2024, applicants are required to provide the mechanical completion date of a project. Tracking mechanical completion dates supports the SOMAH PA's understanding of the time it takes for a system to receive permission to operate (PTO). For the 118 projects that have reported both the mechanical completion date and PTO date, the average time between mechanical completion and PTO is about nine months. By collecting this data, the PA aims to gain valuable insights into project timelines and potential delays. Additionally, the Extension Request Form includes mandatory fields for applicants to provide an updated actual or projected construction start date to ensure quality information, the most up-to-date data capture, and further insight into milestone progress.

Actual construction start timelines will continue to be updated as data is collected at different milestones in the application process. Throughout Q3-Q4 2025, 106 new extension requests were submitted, all of which contain a construction timeline. The additional data collected in the new mandatory fields shows more projects claiming actual construction start dates over projected construction start dates. In the projects that have submitted multiple extension requests, findings show the most recently submitted requests are more likely to have already begun construction instead of providing a projected construction start date. The revised Extension Request Form allows the SOMAH PA to gain more visibility into construction timelines, project progression, and the necessity for extension requests.

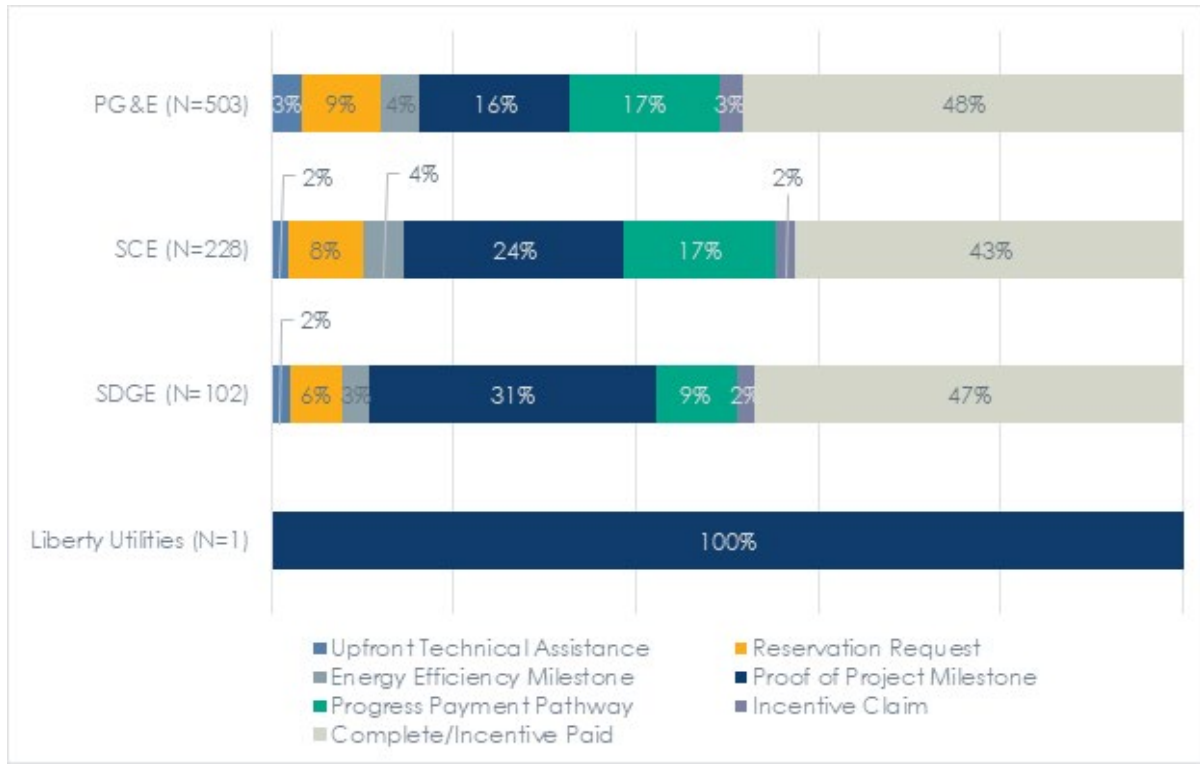
The number of projects reported to have begun construction in Q3-Q4 2025 (20) remains steady each quarter with 13 projects beginning construction in Q3 2025 and seven projects beginning construction in Q4 2025. Q1-Q2 2025 (64) had a greater number in Q1 with 39 projects beginning construction and 25 projects beginning construction in Q2 2025. Construction timeline projections continued to shift through Q1-Q2 2026 as projects progressed and were better able to forecast construction timelines with more certainty. Through feedback provided via extension requests and other direct applicant input, the SOMAH PA anticipates a significant number of projects will enter the project completion phase in the first half of 2026.

Figure 7 – Current Milestones by IOU Territory

Program	Upfront Technical Assistance	Reservation Request	Energy Efficiency Milestone	Proof of Project Milestone	Progress Payment Pathway	Incentive Claim	Complete/ Incentive Paid
PG&E	17	43	22	82	83	13	243
SCE	4	19	10	55	38	5	97
SDG&E	2	6	3	32	9	2	48
Liberty Utilities	0	0	0	1	0	0	0
PacifiCorp	0	0	0	0	0	0	0
Total	23	68	35	170	130	20	388

N = 834

Figure 8 – Percentage of Active Applications by Milestone and Territory⁸



N = 834

During this reporting period, application submissions and project completion increased, while the majority of projects moved into later phase milestones, most prominently the Progress Payment Pathway. The increase in the number of applications entering and completing the Progress Payment Pathway indicates many projects have reached mechanical completion and are likely awaiting permission to operate (PTO) prior to submitting their Incentive Claim Package. These positive trends show project closeout is likely to increase in the next reporting period.

In Q3-Q4 2025, eight new Track A applications were submitted. Six of these applications utilized the prescreen service prior to submitting Track A. Of the eight Track A applications working with the SOMAH PA to submit the documentation required for the

⁸ PacifiCorp is not represented in Figure 8 because no projects are active in this territory at the time of reporting.



Upfront Technical Assistance stage in PowerClerk, six are approved and two have been canceled, one due to tax credit funding restrictions and one because an existing system is on NEM. The SOMAH PA works diligently with property owners to ensure they receive guidance through every part of the Track A application process, program requirements, platforms, etc. More information can be found in Section 3.5, Technical Assistance.

Figure 9 – Applications by Incentive Track since Program Start

Assigned Incentive Track	Active	Complete/ Incentive Paid	Canceled/ Withdrawn	Total
Track A	33	4	57	94
Track B	413	384	386	1183

N = 1,277

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

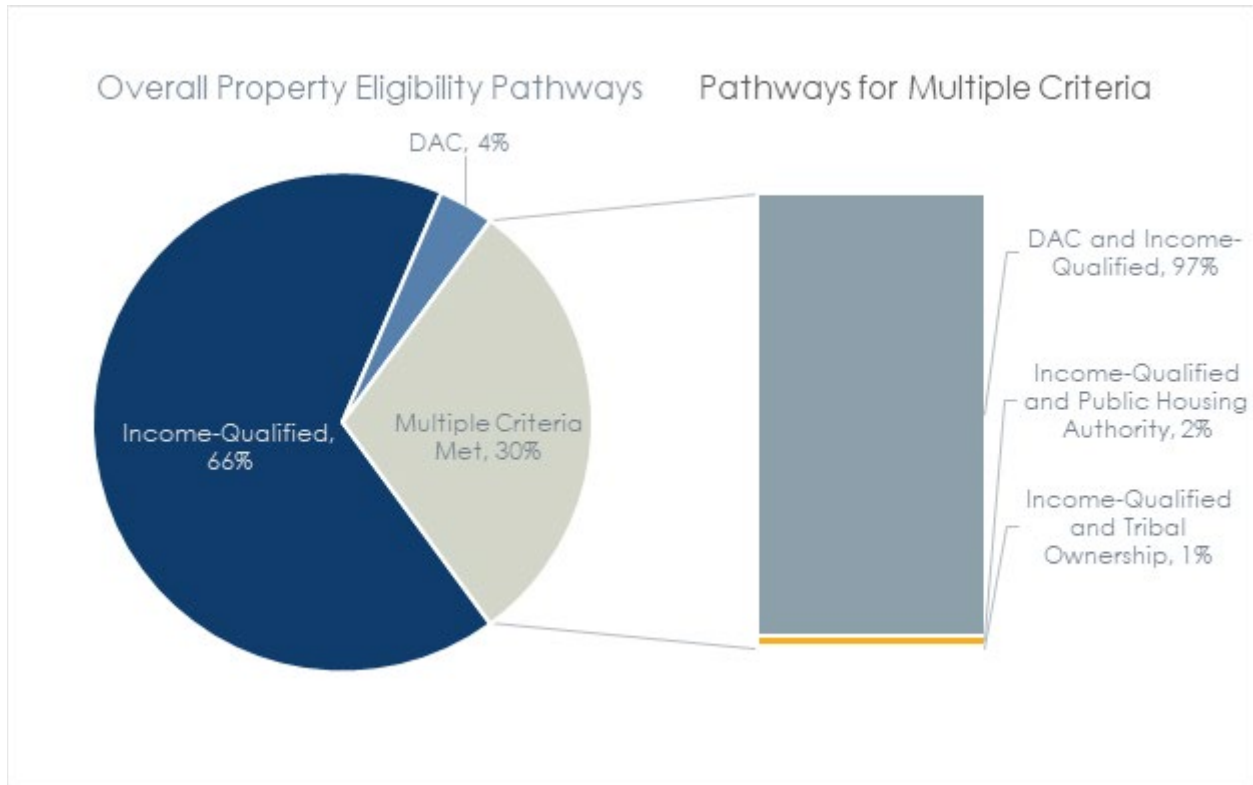
- Income-Qualified: 66% of property residents have incomes at or below 80% AMI as determined by the California Department of Housing and Community Development.
- DAC: The property is located in a disadvantaged community (DAC) as identified by CalEPA.
- Tribal Ownership: The property is owned by a California Native American tribe.⁹
- Public Housing Authority: The property is rental housing property that is owned by a public housing authority or public housing agency.¹⁰

⁹ As defined in Section 21073 of the Public Resources Code, "tribe" is defined as a California Native American tribe. "California Native American tribe" means a Native American tribe located in California that is on the contact list maintained by the Native American Heritage Commission for the purposes of Chapter 905 of the Statutes of 2004. Please contact the SOMAH PA for additional details on the Native American Heritage Commission list and related eligibility.

¹⁰ To qualify under Public Housing Authority, the property must be owned by either a public housing authority created pursuant to the Housing Authorities Law (Chapter 1 [commencing with Section 34200] of Part 2 of Division 24 of the Health and Safety Code) or a public housing agency, as defined in Section 1437a of Title 42 of the U.S. Code.

Figure 10 breaks down the eligibility pathways under which active SOMAH projects are qualified. Figure 11 shows the breakdown between application track and eligibility pathways during this period of performance.

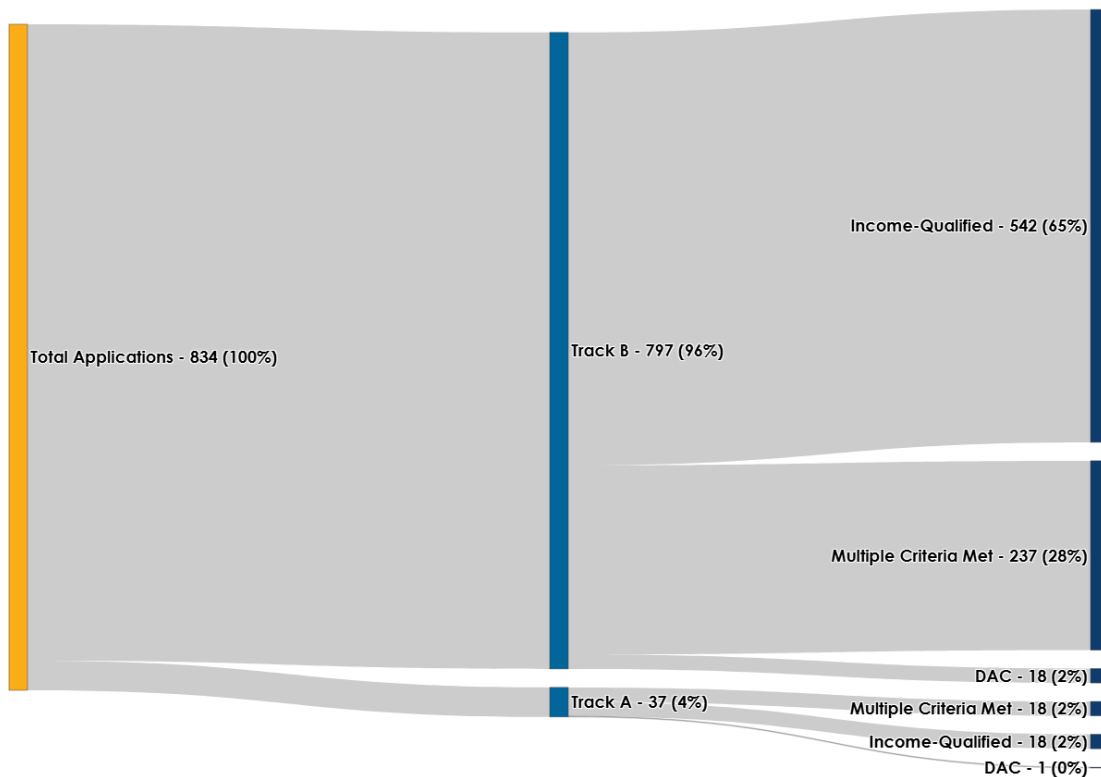
Figure 10 – Overall Property Eligibility Pathways



Of the 834 active applications¹¹ received, approximately 67% qualified through only the income pathway, approximately 2% qualified through just the DAC pathway, and approximately 31% qualified for the program through multiple criteria met. During the first two years of the program, participation of DAC projects fluctuated between 25-30% of SOMAH projects. At the close of this reporting period, the overall percentage of all applications located in DACs declined slightly from 32.6% to 31.7%.

¹¹ Active applications are those that have not been canceled or withdrawn. This figure includes applications pending reservation approval that have not yet had their project information fully finalized.

Figure 11 – Property Eligibility by Incentive Track¹²



Figures 12 and 13 further break down the property eligibility statuses by count and percentage to highlight the number of DAC, Public Housing Authority, and Tribal Ownership-qualifying properties.¹³ The SOMAH PA continues to consider ways to increase participation for DAC-qualifying properties and will continue work to meet the benchmark and support overall program goals. Two impactful updates that have supported increasing DAC project participation in SOMAH are the Handbook 5 update to uphold DAC status of both the current and immediately previous version of

¹² Calculations used for this visual are subject to rounding and total percentages may not equal 100%.

¹³ DACs are not distributed evenly across the IOU territories. The percentage of census tracts that are DACs in each IOU territory varies, along with the overlap of eligible properties in a DAC by each IOU territory. The SOMAH PA does not know of any properties located in DACs in Liberty Utilities or PacifiCorp territories.



CalEnviroScreen and the inclusion of federally recognized tribal lands as part of the CalEnviroScreen DAC designation. Both updates expand additional potentially eligible properties to qualify for SOMAH through their DAC status.

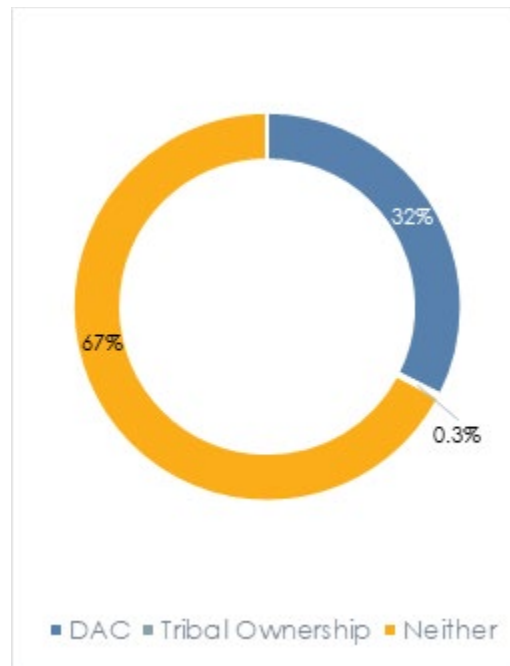
Since implementing Handbook 8 and establishing the two additional eligibility pathways, no new projects have qualified solely through Tribal Ownership or Public Housing Authority. Based on eligible property data reviewed by the SOMAH PA, most eligible properties that are owned by a tribe or public housing authority also qualify for SOMAH by being in a DAC or low-income. As a result, projects that qualify through the Tribal Ownership or Public Housing Authority pathway and are in a DAC or Income-Qualified would be classified under "Multiple Criteria Met." Not included in Figure 12 or 13, but looking granularly at two more specific property types, U.S. Department of Agriculture (USDA) and U.S. Department of Housing and Urban Development (HUD) funded properties make up 10% of all active and completed projects.

Figure 12 – Property Eligibility by Reservation Status since Program Start

Property Eligibility	Pending Reservation Approval	Reservation Approval Received	Complete/ Incentive Paid	Canceled/ Withdrawn
Multiple Criteria Met	24	123	108	126
DAC	1	8	10	27
Income-Qualified	29	261	270	289
Tribal Ownership	0	0	0	0
Public Housing Authority	0	0	0	0
Data not reported	0	0	0	1

N = 1,274

Figure 13 – Property Eligibility by DAC/Tribal Ownership Status since Program Start



N = 1,274

The Reservation Request Milestone is the application entry point for Track B projects, the majority of SOMAH's application pipeline, and the second application step for Track A projects. The Reservation Request Package is a robust and distinguishable milestone for all projects to complete. Split into Phase I and Phase II, the Reservation Request Package includes up to eight required documents and an application deposit (for nonpriority groups) before achieving reservation approval in Phase II of the milestone. The main components of the Reservation Request Milestone's two phases are 1) eligibility verification through review of the associated eligibility documentation, 2) IOU data request for consumption data and system sizing, and 3) the application deposit (for nonpriority groups¹⁴) before issuing a reservation approval. This approval is an

¹⁴ An application deposit invoice will not be issued, nor is an application deposit required for priority group applications. Priority groups include DAC and tribal properties.



important achievement for projects and for programmatic data and milestone tracking.

At the close of Q4 2025, there were 54 applications yet to receive reservation approval. Track A applications that have not yet submitted a reservation request account for 22 of the 54 applications. The remaining 32 applications are in the Reservation Request Milestone and of those, 17 applications are currently in Processing Data Request, Data Results Shared, or Pending Application Deposit status before receiving final reservation approval. The remaining 15 applications are in Reservation Request Submitted, Pending QA, Suspended, or Review status. Most of the program's applications have passed the Reservation Request Milestone; 392 applications have received reservation approval and 388 are completed and paid projects.

Not only is reservation approval a significant achievement for an application, but it also signals an important handoff of information between the SOMAH PA and IOUs. Based on mandates in CPUC D.17-12-022, the SOMAH PA sends monthly reports to the IOUs for the Multifamily Energy Savings Program (MFES). Previously named the Energy Savings Assistance Program (ESA), MFES was launched to provide in-unit and whole-building upgrades for low-income residents. MFES is split into two territories, Northern and Southern California. The Southern program includes customers in SCE and SDG&E territories while the Northern program serves PG&E customers.

The SOMAH PA sends project referrals to the partner IOUs both monthly and annually. A list of projects that have reached reservation approval status are shared monthly, along with a roll up of all projects with approved reservations. These reports are an important part of the data exchange between the SOMAH PA and IOUs, which creates "warm" MFES Program leads that will hopefully become active MFES participants. The outcome of the monthly reported leads is collected annually in Q4 with returned data from the IOUs based on completed projects that have received SOMAH incentives. The first IOU data collection was completed in Q4 2021 with information on whether the SOMAH projects materialized into ESA Common Area Measures or in-unit referrals. With the limited number of completed projects at the time of the request in 2021, the available data for ESA referrals increased significantly with the 2023 data request. The MFES Program launched on July 1, 2023. The most current data on successfully enrolled MFES projects is noted below, and the SOMAH PA will continue to report on these projects in future reports.

The annual ESA referral data request is a rolling list of completed projects. Since 2021, the IOU reporting captured ongoing efforts of ESA Common Area Measures and in-unit engagement for SOMAH projects. As of 2024, the IOU reporting captures MFES Program efforts for SOMAH projects. The SOMAH PA collected reportable feedback for the 2024



annual ESA referral data request in Q1 2025. Results of the 2024 request are summarized below while feedback for the 2025 annual ESA referral data request will be shared in the forthcoming Q1-Q2 2026 SAPR.

PG&E

- 18 projects referred to ESA/MFES, equating to 745 tenant units.
- 1 project completed ESA Common Area Measures, and 1 project is in progress for in-unit.
- Measures installed include occupancy sensors and tankless water heaters.

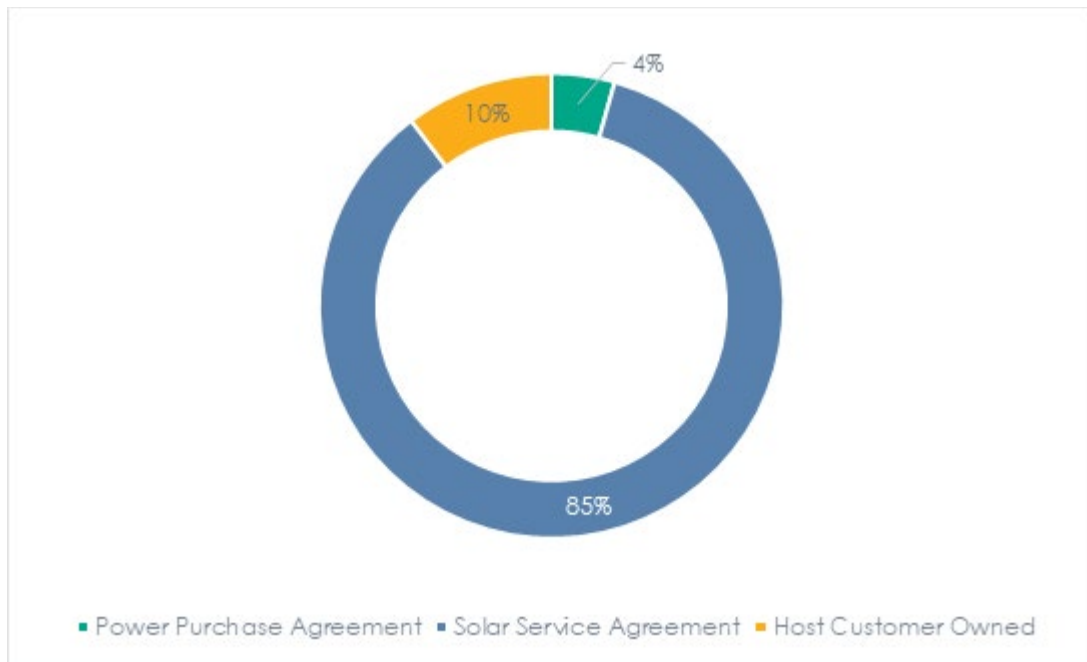
SCE

- 3 projects referred to ESA, equating to 167 tenant units.
- 5 projects enrolled in ESA Common Area Measures and in-unit.
- Measures installed include bulb replacements, outdoor and indoor fixtures, pool pump replacement, HVAC, and smart thermostats.

SDG&E

- 9 projects referred to ESA, equating to 575 tenant units.
- No projects enrolled in ESA Common Area Measures or in-unit.
- Measures installed include air sealing, LED lights and bulb replacements, smart strips, microwaves, shower head replacements, water education, in-home energy education, and assessment.

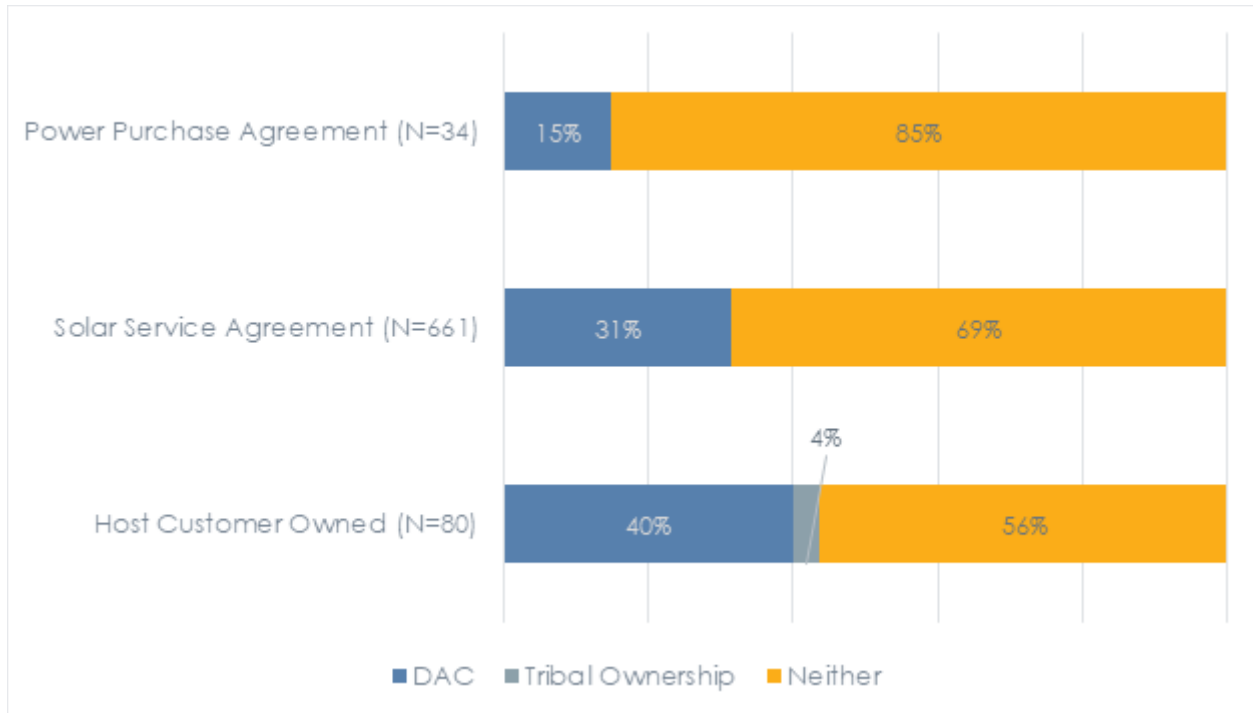
Figure 14 – System Ownership Type



N = 776

As Figure 14 shows, 85% of SOMAH projects are Solar Service Agreement (SSA) systems, similar to what some contractors term power purchase agreements (PPAs). With Handbook 5, the SOMAH PA began differentiating contract types between SSAs and PPAs, both of which are third-party ownership models, in an effort to capture the most accurate information based on the solar PV contract. For the purposes of SOMAH, an SSA is where the customer pays a fixed monthly fee for the use of the system as opposed to paying a rate for the amount of electricity generated. Feedback shared by past third-party program evaluations, and by both property owners and contractors, suggests the third-party ownership option is more financially feasible for property owners given the minimal upfront costs associated with this arrangement. Additionally, some contractor companies have preferred system financing/ownership options for their installations, which likely influences the system ownership breakdown for the current application queue. The SOMAH PA has continued to engage with interested parties to support additional PPA providers approved for the program. Additional information on PPA providers can be found in Section 3.2.3, Contractors.

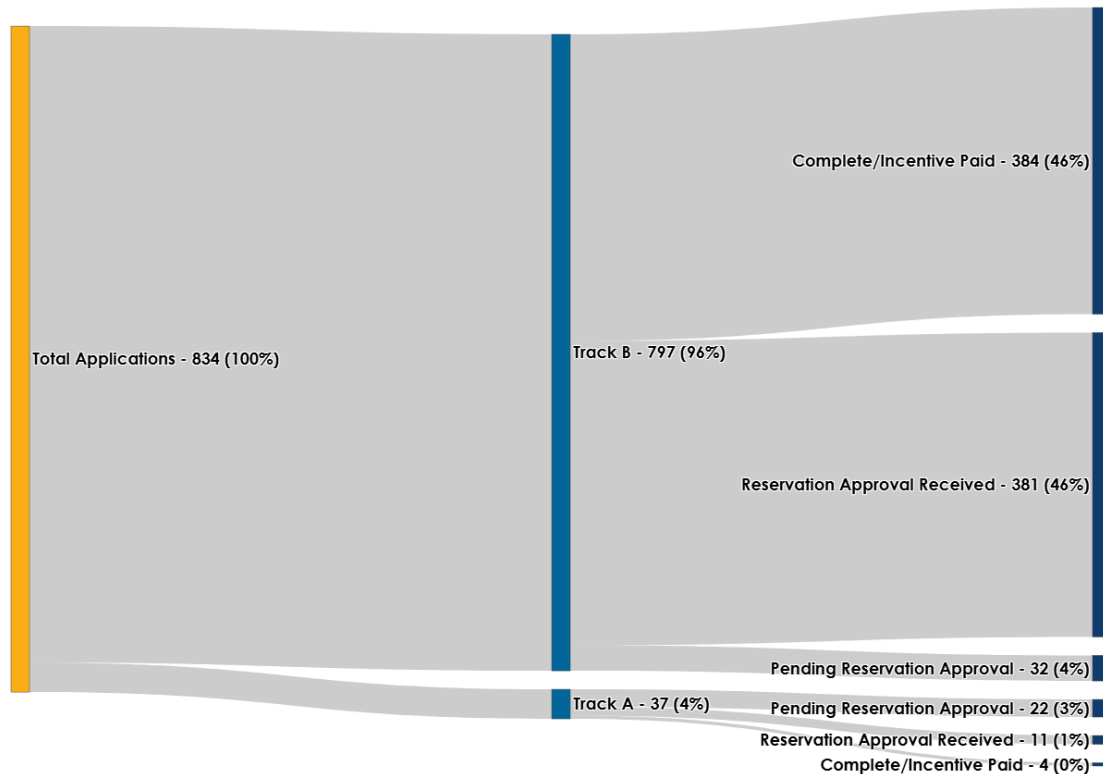
Figure 15 – System Ownership Type by Property Eligibility



N = 768

Figure 15 further segments system ownership types by DAC, Tribal Ownership, or neither DAC nor Tribal Ownership properties. It illustrates that 40% of host customer-owned systems are reported to be installed in DACs and another 4% at tribal-owned properties. In comparison, 46% of solar installations in DACs have entered an SSA or PPA, illustrating that DAC and tribal-owned properties are more likely to enter an SSA or PPA than purchase their solar systems.

Figure 16 – Application Reservation Status by Incentive Track¹⁵



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

Energy Efficiency Compliance Milestone

The goal for the Energy Efficiency Compliance Milestone (EECM) is to assess the project site for energy efficiency opportunities, focusing on reducing site consumption before producing solar energy at the property. There are two pathways to fulfill the EECM requirement:

- Pathway 1 – Energy efficiency whole-building walk-through audit.
- Pathway 2 – One of the following:

¹⁵ Calculations used for this visual are subject to rounding and total percentage may not equal 100%.



- Recent or active participation in an approved whole-building energy upgrade program.
- Documentation of a recent California Tax Credit Allocation Committee rehabilitation.
- Documentation that the property was completely constructed under a recent version of Title 24.

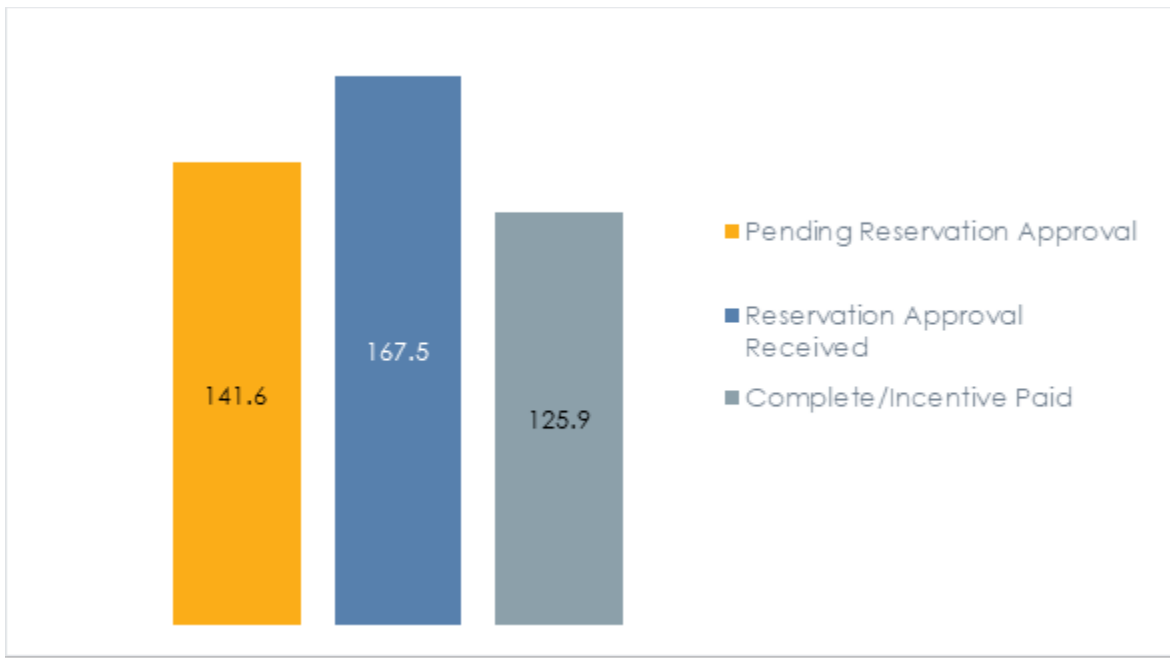
To accommodate COVID-19 challenges with completing Pathway 1, the SOMAH PA temporarily introduced the EECM Postponement option in July 2020, allowing projects that received reservation approval to postpone submitting their EECM documentation up to submission of the Incentive Claim Milestone. Of the 277 applications that have participated in EECM postponement, only 13 are left that have yet to fulfill these requirements. The SOMAH PA anticipates that the remaining applications with EECM postponement will be submitted and reach the Incentive Claim Milestone by the end of 2026.

Application Statistics

Completing application milestones is a critical step in the application process and important for collecting valuable program data. In this reporting period, the program queue has projects in all stages of application, construction, and completion processes representing each of the program's five application milestones (with the option to opt out of one¹⁶). The Reservation Request and Energy Efficiency Compliance Milestones are important steps in determining project eligibility and system size, as they consider consumption history and available energy efficiency upgrades. Proof of Project and Incentive Claim Milestones provide information on the contracted and executed system as well as proof of compliance with the program's job training and tenant education requirements.

¹⁶ Per D.24-11-006, the Progress Payment Pathway is the default option, with an option to opt out. This change was implemented through Handbook 9.

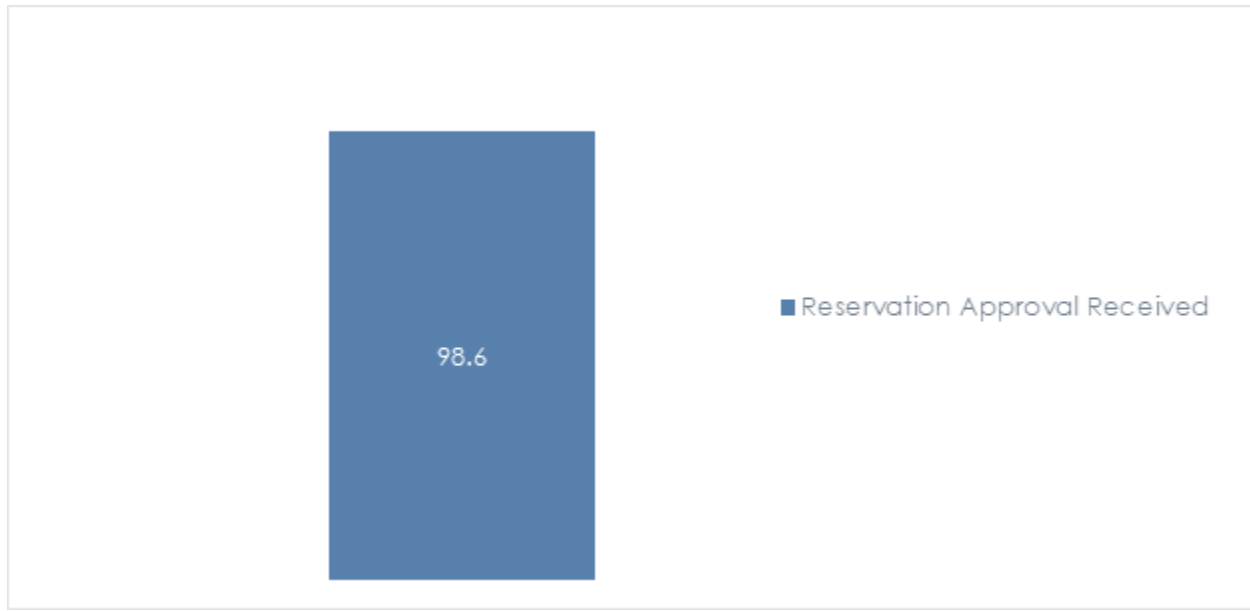
Figure 17 – Average System Size (kW) by Reservation Status



N = 811

Validating each project's system size with aggregated annual electrical consumption history from IOU data requests is a key step of the reservation request, prior to approval. Historic electrical consumption directly influences the system's final size and incentive calculation. Figures 17-22 outline system size statistics for the average and largest projects across the IOU territories.

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



N=60

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

Program	Pending Reservation Approval	Reservation Approval Received	Complete/ Incentive Paid	Canceled/ Withdrawn
PG&E	126.9	156.3	109.2	169.9
SCE	169.6	199.6	165.4	201.6
SDG&E	40.5	148.5	130.3	150.9
Liberty Utility	0.0	55.2	0.0	93.2
PacifiCorp	0.0	0.0	0.0	111.6

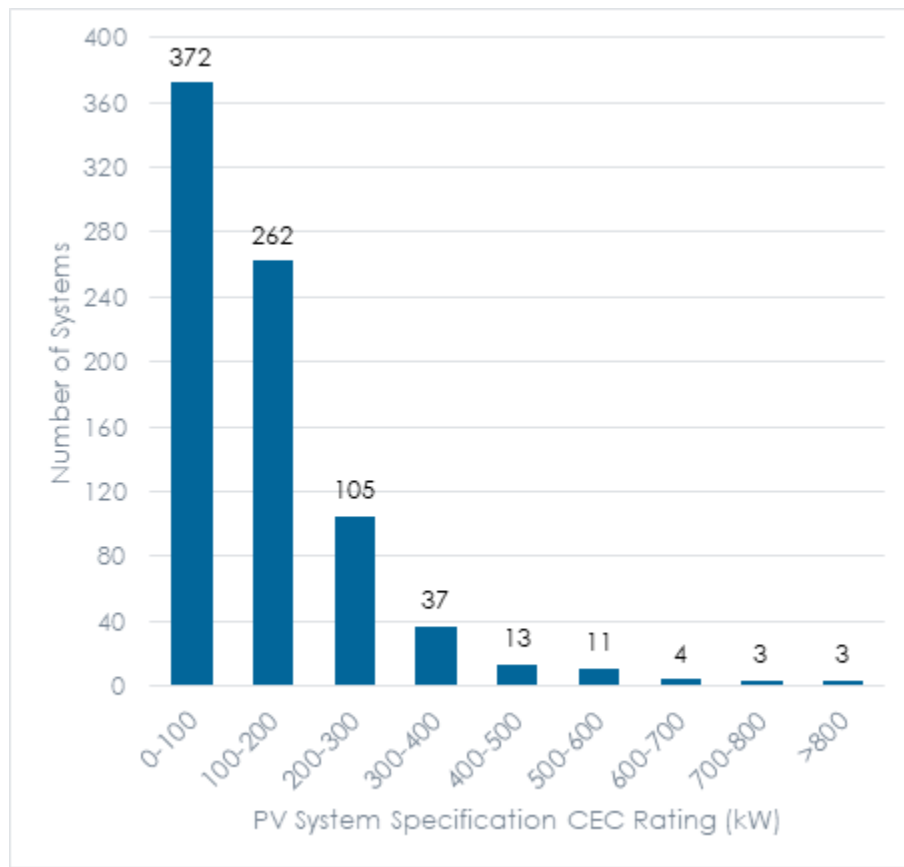
N = 1,192

Figure 20 – Average Energy Storage System Size (kW) by IOU Territory and Reservation Status

Program	Pending Reservation Approval	Reservation Approval Received	Complete/ Incentive Paid	Canceled/ Withdrawn
PG&E	0.0	100.6	0.0	0.0
SCE	0.0	100.7	0.0	0.0
SDG&E	0.0	38.6	0.0	0.0
Liberty Utility	0.0	0.0	0.0	0.0
PacifiCorp	0.0	0.0	0.0	0.0

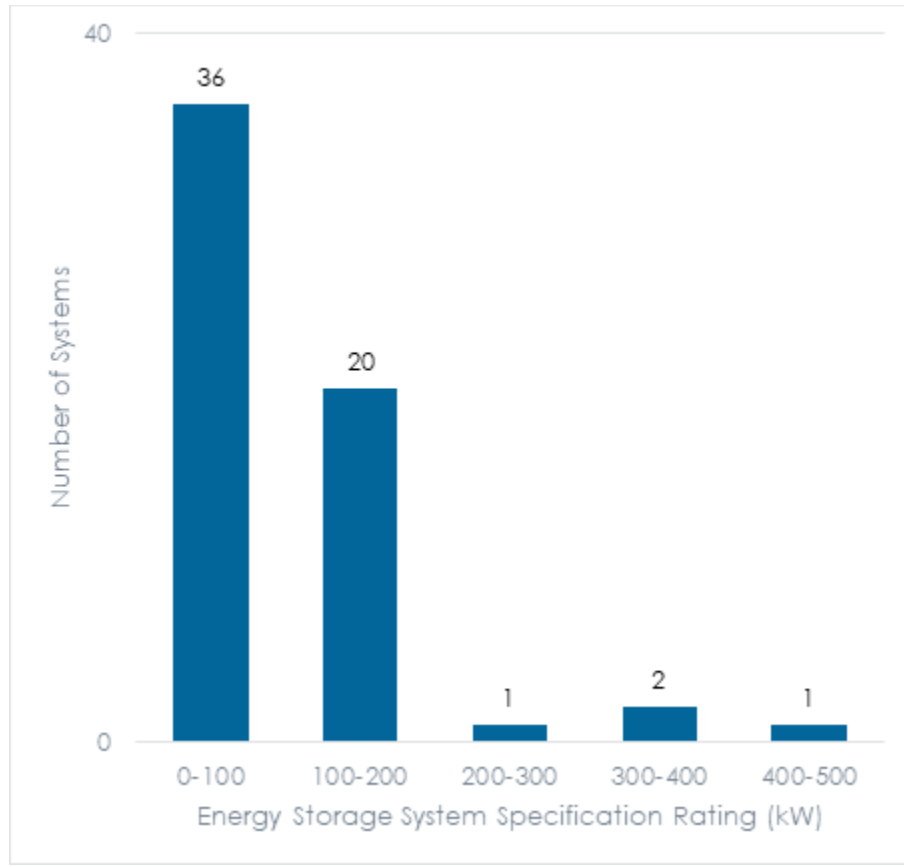
N = 60

Figure 21 – Distribution of System Sizes (kW)



N = 811

Figure 22 – Distribution of Energy Storage System Sizes (kW)



N=60

Eligible energy storage that is integrated with the SOMAH VNEM solar system can receive incentive funds from the SOMAH Program effective with Handbook 9. Applicants were first able to add integrated storage to projects in PowerClerk beginning on July 30, 2025. Since then, 60 projects have added integrated energy storage to the project scope, equating to 5,913.52 kilowatts, with averages and distributions shown in Figures 18, 20, and 22. The equivalent in kilowatt hours is 14,762.4. Although incentives for integrated energy storage are currently available, the SOMAH PA is not required to offer storage incentives to all interested applicants, as such an approach puts a strain on meeting the program's statutory goal of installing 300 MW of

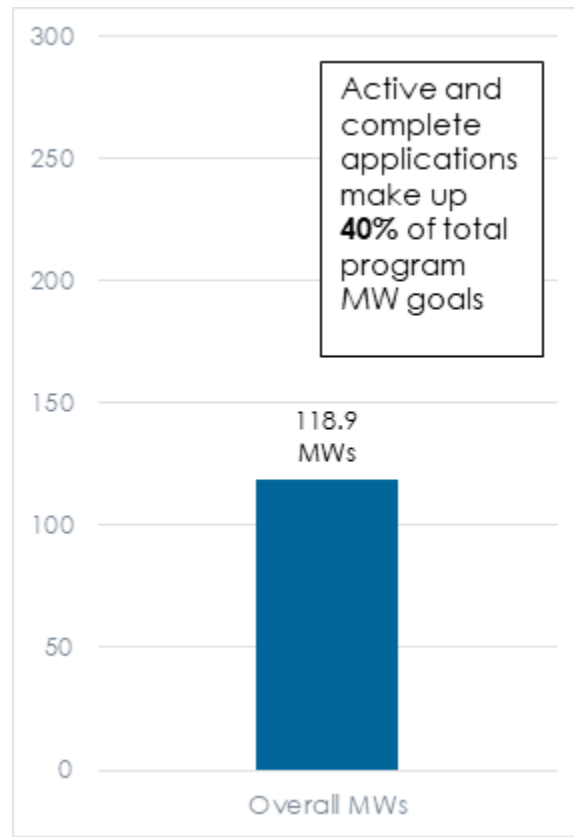


solar capacity.¹⁷ Therefore, the PA can modify or cease the energy storage incentive offering at its discretion. Figure 23 below does not include capacity added by integrated storage and only represents solar capacity. More information on storage incentives can be found in Section 3.1.2 Program Payments.

From the projects with approved reservations, application data from PowerClerk shows projects reduce their system size by an average of 21% from initial submission. The trend to reduce the system size after IOU consumption data sharing (post-reservation submittal and pre-reservation approval) continues. Application data from PowerClerk shows newer projects (submitted in 2025) are trending with larger adjustments overall when compared to projects submitted in 2024. Of the 37 applications that reached reservation approval in Q3-Q4 2025, 23 projects adjusted their system size during the Reservation Request Milestone, while the remaining 14 maintained their originally submitted system size through reservation approval. Of the 23 projects that adjusted system size, only five projects increased the system size from what was originally submitted. Due to available program funds and lack of a waitlist, contractors have more flexibility when submitting a SOMAH application and use the Reservation Request Milestone to fine-tune their system size prior to signing the Reservation Request Form.

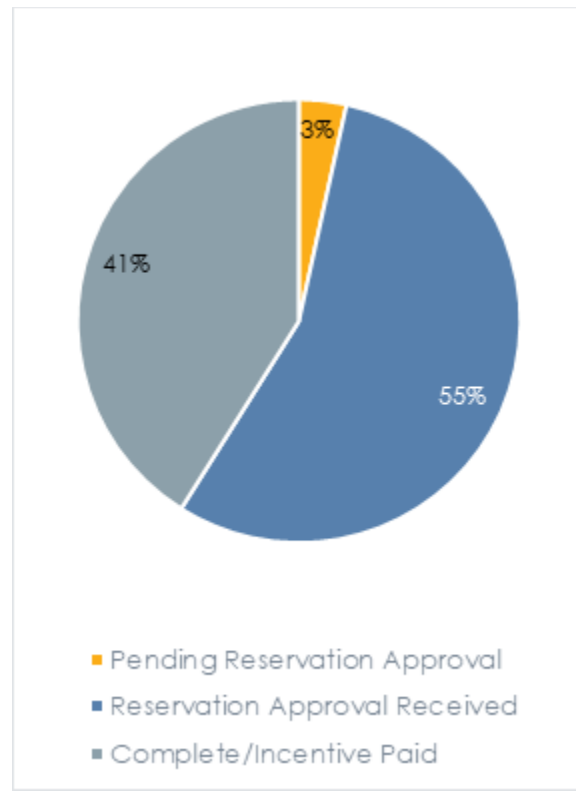
¹⁷ D.24-11-006. Page 37.

Figure 23 – Progress to 300 MW



N = 811

Figure 24 – Percentage of Program MW by Reservation Type



N = 811

Additionally, the average PV system cost is \$4.50/watt CEC-AC¹⁸ with a total expected aggregated annual output of 108,340,180 kWh¹⁹ for the active²⁰ SOMAH projects in queue. Completed projects made up 41% of total application volume at the close of Q4 2025. This percentage slightly increased in comparison to the ratio of active to completed applications at the end of Q2 2025, illustrating a steady influx of new

¹⁸ Project costs are not considered verified until review of the installation contract and associated costs at the Proof of Project Milestone. The numbers used in this average are estimates reported for the projects currently in queue and are likely to fluctuate in future reporting periods.

¹⁹ Expected aggregated annual output is an estimate based on the PV equipment and system configuration specifications currently listed for all active applications in PowerClerk. This figure is subject to change based on updated system designs for projects in queue. System components and configuration are not verified until the final inspection at the Incentive Claim Milestone, which directly impact the expected output of the PV system.

²⁰ Active project means an application is submitted to the queue and is under review or pending completion. Completed, canceled, or withdrawn applications are not included in this figure.



applications is entering the pipeline, while projects continue to reach completion at a steady rate. The percentage of pending reservation approval projects decreased from 8% at the end of Q2 2025 to 3% at the close of this reporting period. This decrease is likely due to improved application processing timelines and reduced administrative burden for applicants, both helping projects receive reservation approval status without delay.

Figures 25 and 26 show the geographic distribution of property locations for applications received and completed projects to date. A more detailed view is provided for higher density project regions in the San Francisco Bay, San Diego, and greater Los Angeles areas.

Figure 25 – Active Project Density and Location Visualizations

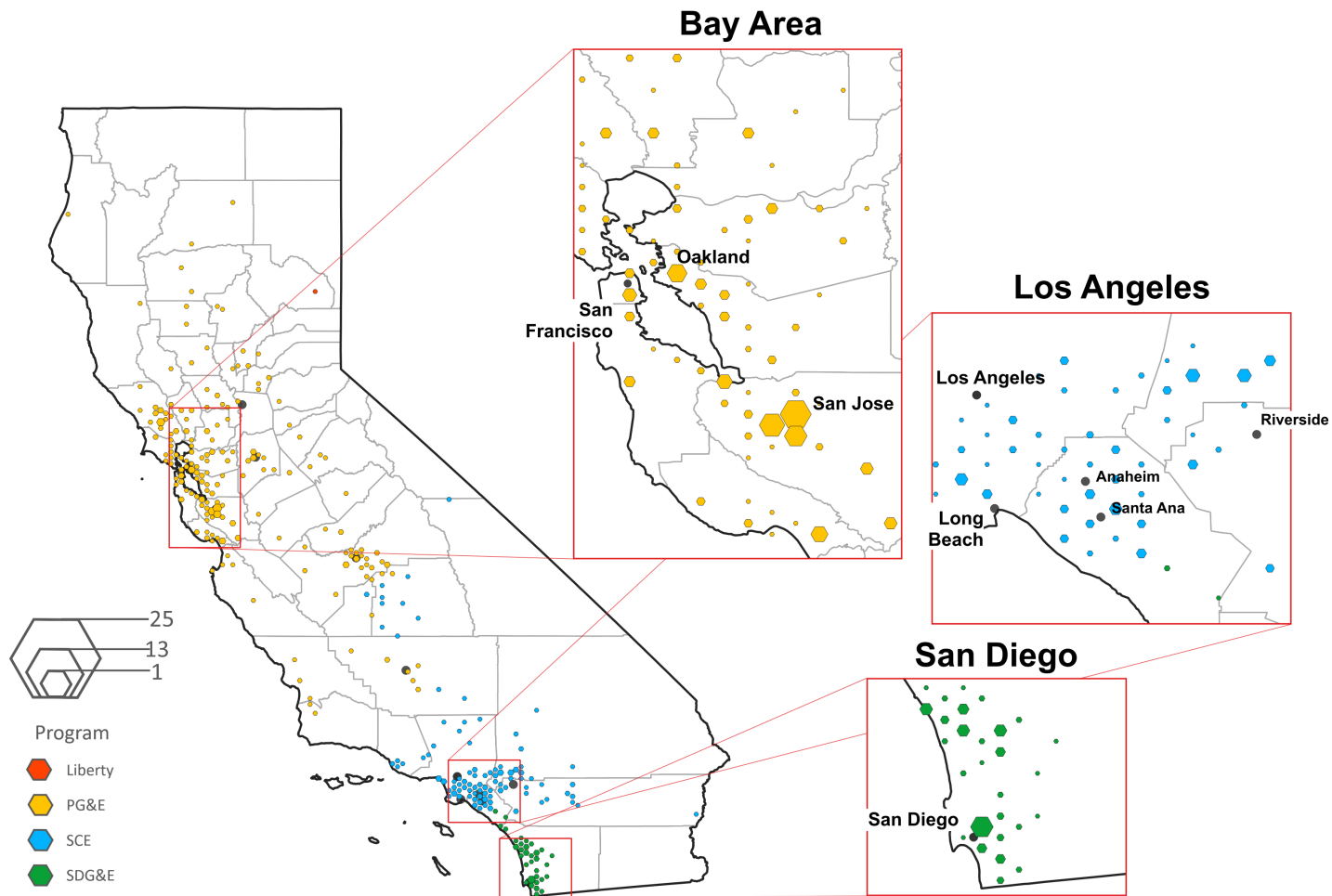
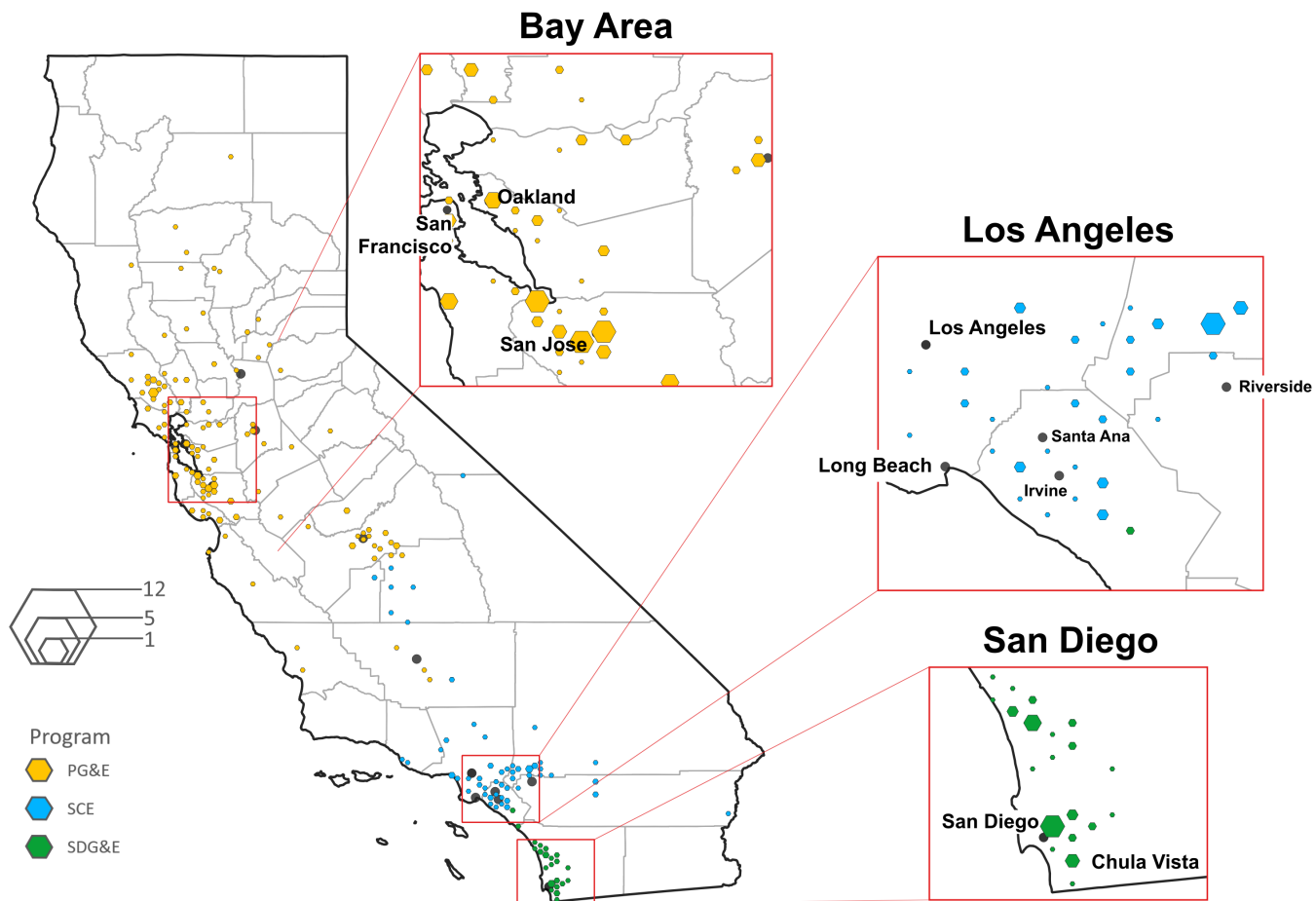


Figure 26 – Completed Project Density and Location Visualization





3.1.2 Program Payments

The Progress Payment Pathway, launched in April 2021, was designed to alleviate cash flow issues reported by participating contractors and help dismantle barriers to diversifying the contractor pool. Depending on the application timeline and installation status, a project can participate with the standard one-payment at the Incentive Claim Milestone or apply for a progress payment after completing the Proof of Project Milestone (PPM). A project is eligible for the Progress Payment Pathway after it has received PPM approval, and the system has been fully installed or is mechanically complete. Mechanical completion is defined as the point at which all PV equipment has been installed, including the net generation output meter socket, and the system wiring has been completed, but the Authority Having Jurisdiction or local utility inspections have not yet taken place, and the system has not yet been granted permission to operate (PTO) from the utility. If a PV system has already been granted PTO, the project is not eligible for a progress payment. In addition, the incentive claim deadline can be no less than two months from the Progress Payments Pathway submission date.

As highlighted in Figure 27, 450 applications opted in to the Progress Payment Pathway. Of those 450 applications, 22 pursued incentives for their integrated storage systems. As a result of the popularity of the Progress Payment Pathway and to streamline the administrative process, progress payments have become the default option pursuant to D.24-11-006. Projects are now able to opt out of the progress payment and pursue a single, final payment if a project chooses. The program requirements for the progress payment have not otherwise changed. Further information can be found in Section 4.2.1, Decision 24-11-006.

All projects requesting a progress payment are required to complete a live virtual walk-through with the SOMAH PA to verify system installation. This consists of a video call, with the participant walking the SOMAH PA through the site to show the system components, including the installed PV modules, installed inverter and the project site address with the street number visible. After a successful walk-through, the SOMAH PA grants approval for the progress payment, which is 60% of the calculated incentive amount. The remaining incentive amount is issued after an approved incentive claim and verified final inspection by the SOMAH PA. Alternatively, should a project be ineligible or not interested in the Progress Payment Pathway, the full incentive is issued as a single payment to the designated payee after an approved incentive claim and verified final inspection as a standard incentive payment.

Upon launching the progress payment offering, additional data fields were added to the working data set on the California Distributed Generation Statistics [website](#) that indicate an approved opt-in to the Progress Payment Pathway and the resulting



progress payment amount. The program's progress payment history is summarized by the payment list below:

- July–December 2025: 74 progress payments issued
- January–June 2025: 49 progress payments issued
- July–December 2024: 94 progress payments issued
- January–June 2024: 99 progress payments issued
- July–December 2023: 49 progress payments issued
- January–June 2023: 15 progress payments issued
- July–December 2022: 30 progress payments issued
- January–June 2022: 20 progress payments issued
- July–December 2021: 8 progress payments issued

The steady increase in progress payments year after year has remained consistent after its launch. The volume in 2025 remains high, with 123 progress payments completed so far. In total, 292 of the projects enrolled in the Progress Payment Pathway have reached the Incentive Claim Milestone and have received their final incentive payment. The timeline for these projects shows the progress payment allowed participants to receive the benefit of a partial incentive payment, on average, eight months prior to their final incentive payment. This timeline supports the SOMAH PA's goal to alleviate financial barriers and support project viability.

Payment requests for progress payments are received once the Progress Payment Pathway is approved. Based on Progress Payment Pathway approval dates, the following summarizes the program's progress payment request history since inception:

- July–December 2025: 73 progress payment requests received
- January–June 2025: 66 progress payment requests received
- July–December 2024: 71 progress payment requests received
- January–June 2024: 112 progress payment requests received
- July–December 2023: 53 progress payment requests received
- January–June 2023: 22 progress payment requests received
- July–December 2022: 13 progress payment requests received
- January–June 2022: 28 progress payment requests received
- July–December 2021: 9 progress payment requests received
- April–June 2021: 4 progress payment requests received

At the end of Q4 2025, of the eight contractors with completed projects, five of the companies have used the Progress Payment Pathway at least once. By advertising progress payment to contractors and with many projects reaching mechanical completion, the use of the Progress Payment Pathway remained consistent in Q3–Q4



2025 and is expected to continue increasing in the first half of 2026. Figure 27 outlines details for the payment program since its launch with a summary of the number of progress payments and standard payments issued and the applicable associated dollar amounts.

Figure 27 – Program Payment Statistics²¹

Program	Progress Payments Issued	Progress Payment Amount	Final Incentive Payments Issued	Final Incentive Payment Amount	Total Incentive Payment Amount
PG&E	306	\$48,257,197	243	\$23,647,672	\$71,904,868
SCE	100	\$24,755,238	97	\$21,681,758	\$46,436,996
SDG&E	44	\$7,628,913	48	\$7,684,363	\$15,313,275
Liberty Utility	0	\$0	0	\$0	\$0
PacifiCorp	0	\$0	0	\$0	\$0
Total	450	\$80,641,347	388	\$53,013,792	\$133,655,140

With the progress payment volume remaining high, the number of inspections also remains relatively steady throughout Q3-Q4 2025. Q1-Q2 had 70 inspections completed across PG&E, SCE, and SDG&E territories, while Q3-Q4 2025 had 59 completed and nine currently in progress. One of these in-progress inspections is claiming storage incentives and will be SOMAH's first inspection that includes integrated storage. The SOMAH PA expects inspections to gradually come in throughout the year as projects continue to finish construction and reach program completion. Additionally, we are expecting more projects with storage to start coming into the inspection queue once the first one is completed successfully.

There was also a decrease in the final payment activity in this reporting period with 63 projects in Q3-Q4 2025 receiving final incentive payments. Although the Q3-Q4 2024 reporting period had the highest final incentive payments issued so far, the SOMAH PA expects a steady number of projects to receive their final incentive payments throughout the beginning of 2026. In total, 377 projects have received their final payment. More than half of the projects that received their final payment have chosen

²¹ Progress Payment Amount total and Final Incentive Payment Amount total include some invoiced, pending payments.



the two-payment pathway rather than the standard one-payment option. The program's cumulative final payment history leading up to 377 final payments is summarized below:

- December 2025: 377 final payments issued
- June 2025: 314 final payments issued
- December 2024: 229 final payments issued
- June 2024: 127 final payments issued
- December 2023: 109 final payments issued
- June 2023: 98 final payments issued
- December 2022: 77 final payments issued
- June 2022: 38 final payments issued
- December 2021: 14 final payments issued
- June 2021: 0 final payments issued
- December 2020: 1 final payment issued

Not all the reported projects have completed installations and received the final incentive payment as shown in Figure 27. There have been no instances of projects dropping out between the disbursement of progress payments and the completion of the incentive claim process. Future Semiannual Progress Reports will continue to include an update on program payment activity as highlighted in Figure 27, as well as analysis of payment timelines and progression details as additional projects are completed and paid.

Integrated Energy Storage

Projects that have added integrated energy storage to the project scope are summarized by reporting period below:

- July–December 2025:
 - 18 progress payments included integrated energy storage.
 - No final incentive payments have included integrated energy storage.

At the close of this reporting period, there are a total of \$14,234,295 incentive dollars for Earmarked, Pending Reservation, Reserved, and Completed energy storage projects.

Early Payment Pathway for Eligible Tribal Projects

As of December 31, 2025, no tribal projects have utilized the Early Payment Pathway. No tribal projects have been submitted since D.24-11-006 and Handbook 9 implemented the Early Payment Pathway for tribal projects.

Increased Incentive Reporting



As of December 31, 2025, 257 projects of the maximum 297 eligible applications submitted the required supporting documentation and were fully approved for the increased incentive offering to existing applications that resulted from Handbook 7. To date, projects that received the revised incentive had an average 11% increase in total incentive. Compared to the pre-revised incentive amounts, \$7.9 million more in incentive funding was allocated to applications that had their revised incentive requests fully approved. The SOMAH PA expects the remaining eligible, conditionally approved applications to receive higher incentives in 2026 given the milestone deadlines for the relevant applications.

Application Deposits

The electronic payment option for application deposits has remained a very popular option for participants, which was a motivation for the SOMAH PA to streamline other payment and incentive claim processing. The electronic payment offering started with application deposits and was further extended to progress payments and final incentive claim payments. At the close of this reporting period, all but 10 incentive payments and 26 deposit fee refund payments were issued via electronic payment method.

Clarification provided by the SOMAH PA's June 2024 Advice Letter 153-E outlines that previously forfeited application deposits may be reused only for canceled projects that re-enter with a new application and only up to the total dollar amount of the prior application deposit. The clarification of the ability to reuse forfeited deposits for project reentry was made to further address participation barriers and financial burden for program participants, while still retaining the programmatic benefit the deposit requirement brings to elevating the quality of incoming applications. This additional detail is reflected in the [Application Process and Documents](#) section of the SOMAH website under the Application Deposits tab. In Q4 2024, the first requests for deposit reuse were received. In total, at the close of 2025, five forfeited application deposits, totaling \$25,000, have been reused. Forfeited deposit reuse represents a tangible removal of a program reentry barrier for projects that are restarting. With previously canceled projects now having the option to reuse forfeited deposits if they re-enter the program, the PA will continue to report on deposit reuse and its relation to canceled application re-entries reported on in Section 3.1.1, Applications and Incentive Statistics, and related outreach efforts are reported on in Section 3.2.4, Property Owners.

3.1.3 Bidding Process

Per Decision D.24-11-006, the online bidding tool was removed in July 2025. The online bidding tool was a platform used to connect property owners with eligible SOMAH contractors, providing an apples-to-apples bid comparison. With the removal of this



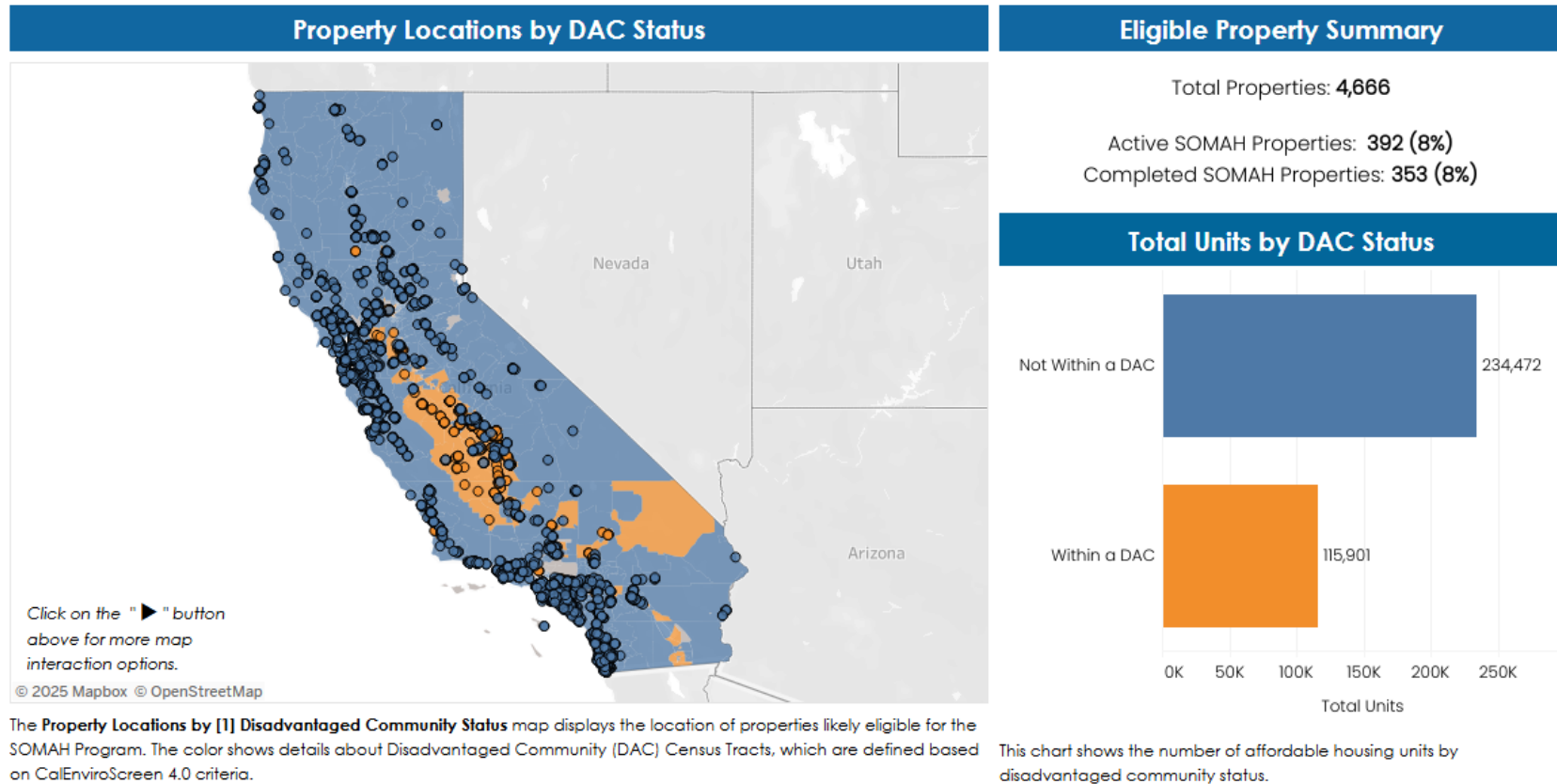
requirement, projects receiving upfront technical assistance are no longer required to obtain three project bids. To continue supporting cost-competitive and high-performing solar PV installations, bid resources remain available to assist property owners in obtaining multiple project bids. Technical assistance can be provided to support the solicitation of project bids and to help property owners understand the potential costs and benefits associated with each option. While the online bidding tool has been removed, SOMAH continues to offer a Contractor Directory that includes all SOMAH-eligible contractors and can be used to generate a list of contractors serving the project location.

3.1.4 Eligible SOMAH Properties Map

Figure 28 provides an overview of the Eligible SOMAH Properties Map. In Q3 2024, the PA created an [Eligible Properties Map Guide](#) to provide direction on interpreting and utilizing the map for stakeholders. This public resource can be found on the [Eligible Properties Map](#) page. The map webpage received over 609 page views in Q3-Q4 2025.

Map data is based on data from the California Housing Partnership's Preservation Clearinghouse, which includes HUD-subsidized properties, USDA Section 515 rural properties, properties financed with Low-Income Housing Tax Credits, and local funding sources. The map is for use by SOMAH participants and stakeholders, especially solar contractors. The SOMAH PA intends to update the underlying map data for potentially eligible SOMAH properties annually. This year's update to underlying map data was completed on April 15, 2025. Data on properties with active SOMAH applications was most recently updated on October 21, 2025. The interactive visuals show multifamily affordable housing as well as current SOMAH applications, allowing users to filter by county, city, ZIP code, street address, SOMAH status, total units, main SOMAH eligibility requirements, legislative districts, and utility territories. The map provides color coding based on a property's location in CalEnviroScreen-defined disadvantaged communities, electric utility territories, legislative districts, and county.

Figure 28 – Eligible SOMAH Properties Map





3.1.5 California Distributed Generation Statistics

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

The working data set continues to be a frequently used resource for program stakeholders and participants to gain insights on program progress and trends. Program data from the working data set also populate data visualizations on the [SOMAH Statistics and Charts](#) page of the California Distributed Generation Statistics [website](#). Eleven charts and graphs are currently displayed on the page covering essential program metrics and participation statistics. With the increased activity for project completion over the past year, these charts and graphs have continued to provide valuable data highlighting the noteworthy impacts of completed SOMAH projects. Section 4, Program Planning and Development, further elaborates on additional public reporting and transparency measures of the SOMAH Program.

3.2 Marketing, Education, and Outreach (ME&O)

As the SOMAH Program increases the number of completed projects, the PA's audience engagement has emphasized program achievements through success stories, press releases, and social media posts. Activities have included planning ribbon-cuttings, in-person events, and improved resources and tools. General messaging to increase application submissions focused on Handbook 9 changes. The program celebrated many successes during this reporting period, as outlined by each audience type below. ME&O efforts were guided by the PA's 2025 ME&O Plan and focused on 1) outreach to property owners and tribes, 2) efforts to increase applications by new contractors and subcontractor participation, 3) providing job trainee opportunities and promoting job trainee participation, 4) facilitating in-person tenant education



workshops and revamping tenant education resources, and 5) increasing stakeholder co-marketing partnerships.

3.2.1 ME&O Plan

SOMAH's annual ME&O Plan guides the program's ME&O activities, setting goals, objectives, and tactics to reach SOMAH's priority audiences and support the overall program goals for 2025. The ME&O Plan uses outreach tactics to increase application submissions (Goals 1, 2, and 5) and to substantiate equitable sustainability for low-income and underserved communities while supporting contractors and property owners (Goals 3 and 4).

The SOMAH PA finalized the 2025 ME&O Plan in March 2025 after a public comment period. The ME&O Plan is posted annually on the CPUC's California Distributed Generation Statistics [website](#).

Drafting of the 2026 ME&O Plan began in this reporting period. Tactics and efforts that have proven successful will continue with strategic tweaks to prioritize property owner and contractor support and outreach. Adjustments will also be made to address any challenge areas. The 2026 ME&O Plan will further incorporate changes related to ME&O outlined in D.24-11-006, including adoptions of goals, key performance indicators (KPIs), and metrics on CBO partnerships and general applicant outreach, dedicated ME&O efforts in the Liberty and PacifiCorp territories, and removal of the tenant education requirement.

3.2.2 Monitoring, Evaluation and Research

The SOMAH PA routinely uses mixed methods to monitor and evaluate ME&O efforts, including surveys, qualitative interviews, program data analysis, reporting, and other transparency activities. Research efforts are determined by the PA based on the program implementation plan, handbook, annual ME&O plans, and other ongoing needs. The objectives of SOMAH Program participant research are:

- Understand audiences' motivations for program participation and barriers they may face to participating.
- Gauge program participants' overall satisfaction with SOMAH.
- Determine program participants' willingness to continue participating and recommend SOMAH to others.

Surveys have been issued to all SOMAH audiences at various stages, from ME&O outreach efforts through the application process to post-application. Feedback from surveys of SOMAH's key audiences is used to inform ongoing ME&O outreach efforts and the application process. See Figure 29 for a summary of ongoing and completed



surveys. Some surveys previously reported on have been removed to showcase the most relevant and recent program activities.

Figure 29 – Completed and Planned Surveys by Category

Audience	Survey Name	Milestone/ Timeline	Launch Date	Frequency
Contractors	Job Trainee Performance Survey	Post-project installation	Launched Q3-Q4 2021	Ongoing post-installation
Contractors	Job Trainee Employed Survey	Post-project installation	Launched Q3-Q4 2021	Ongoing: 3, 6 and 9 months after reported trainee hiring
Property Owners	Technical Assistance (TA)	Post-TA, pre-preservation request	Launched Q4 2021	Ongoing post-TA
Job Trainees	Job Trainee Experience Survey	Post-project installation	Q1-Q2 2022	Ongoing post-installation

ME&O Program Research

During the current reporting period, no ME&O research was conducted by the SOMAH PA. Previous research projects included Contractor Focus Groups and outreach interviews, Property Owner Pipeline Analysis, Subcontractor Interviews, Tenant Education Focus Groups and Building Inventory Analysis. Please refer to prior Semiannual Progress Reports for further information on previous research projects.

A third-party evaluation is currently being conducted and will be released by Q3 2026.

3.2.3 Contractors

The SOMAH PA engages with active SOMAH contractors through the Track B application pathway and with prospective contractors through direct outreach and webinars. During this reporting period, the SOMAH PA continued to focus contractor outreach efforts on direct outreach, digital channels, and virtual events.

Per D.24-11-006, the SOMAH PA removed the online bidding tool and began to formalize how inbound and outbound contractor outreach is reported in this and future SOMAH SAPRs. Moving forward, the TA and Support Services will be working more closely with property owners when project bidding is requested by a property owner. In October and November 2025, the PA sent emails to self-identified contractors in the SOMAH listserv. The emails relayed information about the new bidding process and asked for contractors to update their primary contacts (if needed) and to sign up for bidding solicitations. In 2026, the PA will reach out to contractors directly to review the

new bidding process and capture contractors who were not signed up to the external bidding tool (See section 3.1.3 Bidding Process). Secondly, Figure 30 sums up direct points of interaction with solar contractors and trade allies. The PA was unable to capture IOU service territories for contractors who used the Check Eligibility Form and was unable to connect (via call or email) after form submissions. A field to capture IOU service territories has been added to forms and will be reported in subsequent SAPRs.

Figure 30 – Points of Interaction with Potential Contractor Applicants

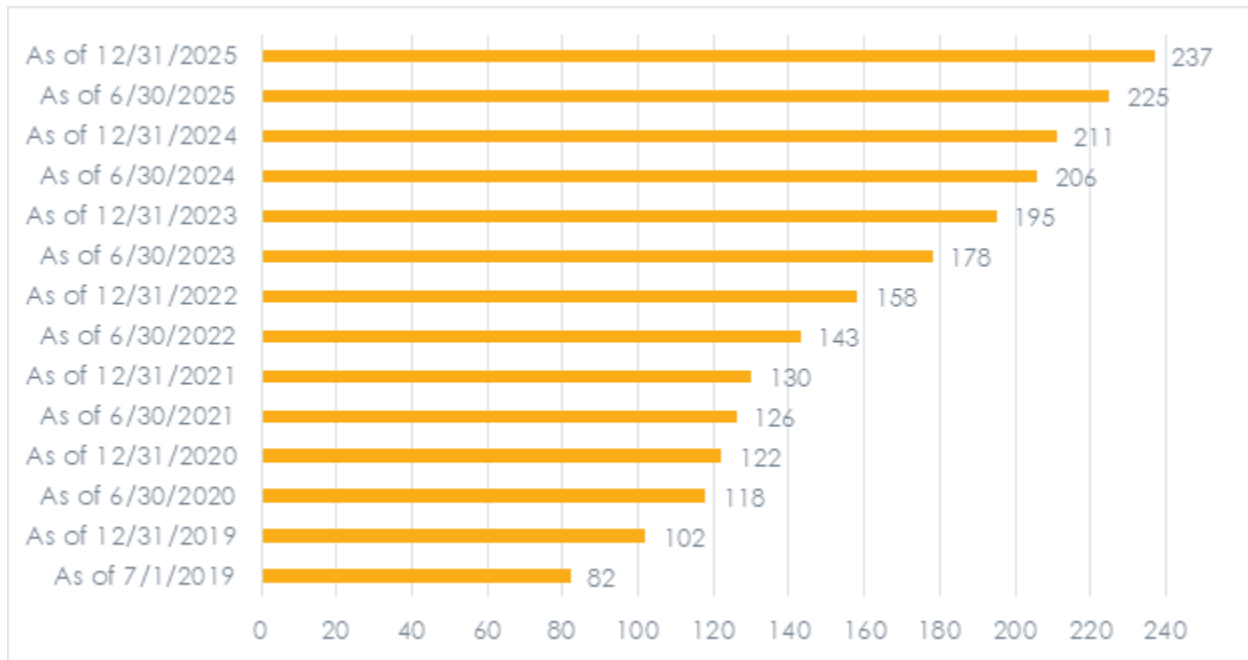
	IOU or Tribal	Initial Interactions
Initiated by Potential Applicant	Liberty	0
	PacifiCorp	0
	PG&E	5
	SCE	2
	SDG&E	1
	Unknown IOU Service Territory	179
Initiated by SOMAH PA	Liberty	0
	PacifiCorp	0
	PG&E	37
	SCE	4
	SDG&E	1
Total		229

The PA continues to engage contractors through ongoing quarterly Applicant and Contractor Eligibility Trainings. During this reporting period, eligibility training sessions were held in July and October 2025. The applicant and contractor training sessions had a total of 27 attendees out of 64 registrants. Attendees included new contractor companies, new staff members of already eligible contractors, and representatives from energy efficiency agencies. Training session promotion included several social media posts on SOMAH's Facebook, LinkedIn, Instagram, and X channels. At the close



of this reporting period, there were a total of 237 SOMAH-eligible contractors, as shown in Figure 31.

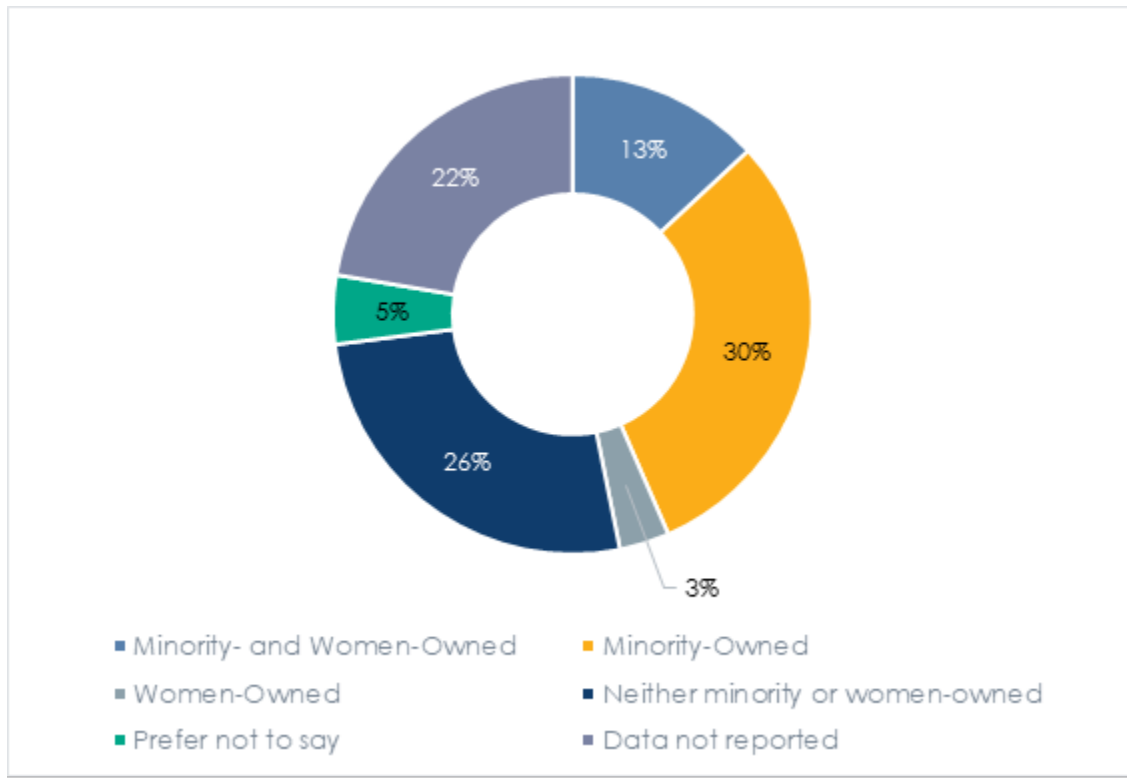
Figure 31 – Number of Eligible Contractors Over Time



During this reporting period, there were six new SOMAH-eligible contractors and an increase in Affordability Prescreen submittals. The PA continues to prioritize outreach to contractors and trade allies to boost program participation. During this reporting period, the PA engaged with MFES Program trade allies to promote co-enrollment in both the SOMAH and MFES programs. This outreach resulted in one MFES contractor participating in SOMAH's Contractor Eligibility Training and, as a result, becoming a SOMAH-eligible contractor.

During this reporting period, the PA offered applicant and contractor office hours webinars. In November 2025, SOMAH's Office Hours Webinar discussed integrated storage with a focus on available tools and resources on the SOMAH website. Thirty-five contractors registered for the webinar and 17 attended. SOMAH plans to continue these efforts in 2026 to promote engagement and inform contractors on upcoming program updates.

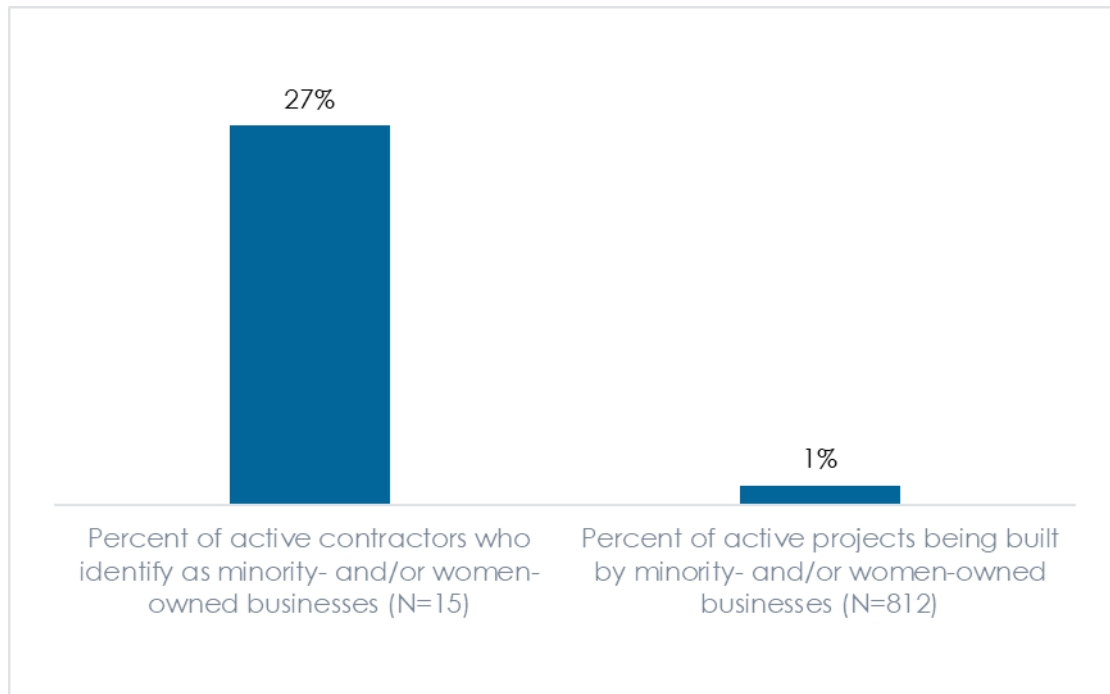
Figure 32 – Eligible Contractor Statistics



N = 237

SOMAH collects self-reported contractor diversity markers for companies owned by minorities, women, and/or LGBTQIA+ as well as small companies with fewer than 25 employees. Out of the total 235 SOMAH eligible contractors, 131 identify as small companies, 102 identify as minority owned, and 39 identify as woman owned.

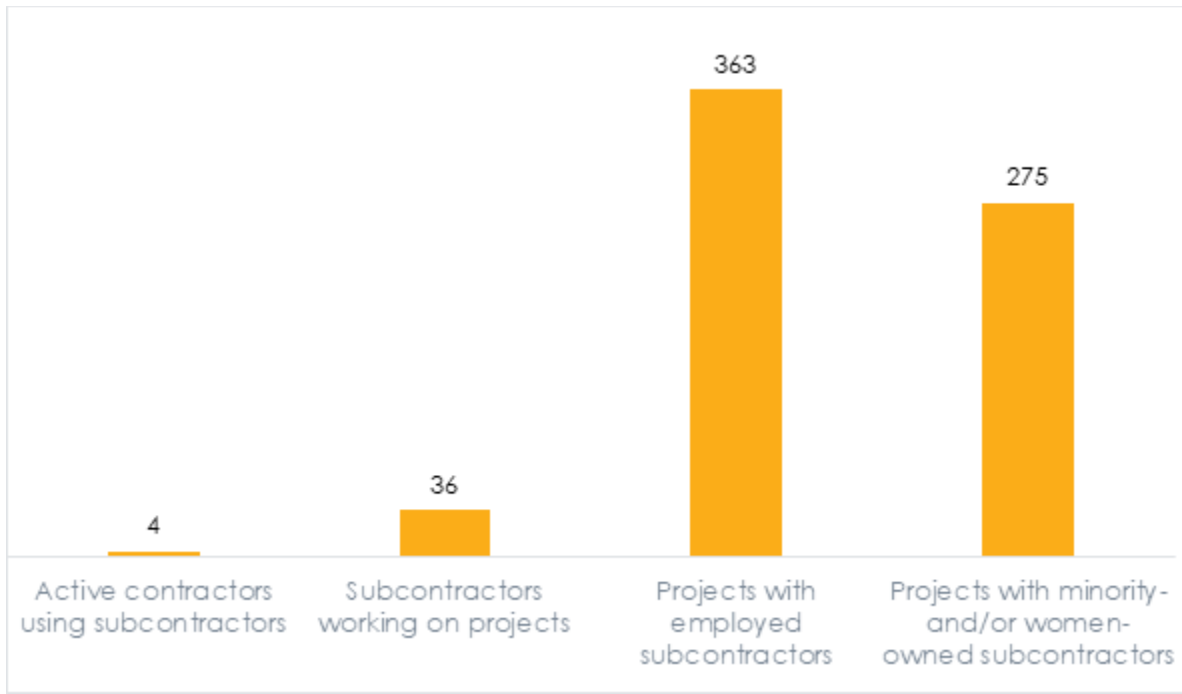
Figure 33 – Active Contractor Diversity



Once a project has reached completion, the SOMAH PA receives information about subcontractors that have worked on SOMAH projects. As of this reporting period, there have been a total of 36 subcontractors that have participated in or are currently working on SOMAH projects. Currently, four contractor companies are using subcontractors on a total of 362 SOMAH projects. Increases in the number of reported subcontractors correlate with an increase in the number of projects completing installation. This is likely because prime contractors manage the application process and/or financial side of SOMAH projects, including managing PPAs, while subcontractors are involved with the on-site installation process. The PA is actively working with subcontractors to help them better understand the program and transition to becoming primary contractors and engaging their own projects. As highlighted in the 2023 SOMAH Second Triennial Report, subcontractors are increasing overall contractor diversity.²²

²² Diverse businesses are small (i.e., < 25 employees) or underrepresented-owned businesses.

Figure 34 – Subcontractor Statistics



Handbook 9 changes (initiated by D.24-11-006) reengaged contractors and increased application submissions. These updates include incentives for integrated storage systems, the removal of the bidding requirement and tool, revised job trainee requirements, and application streamlining. The PA focused on targeted outreach through informational office hours and updated resources and tools, as well as direct communication with contractors and trade allies to inform them about the new requirements and improvements offered by these program updates.

3.2.4 Property Owners

Property owner engagement was conducted in-person and through digital channels. Primary channels of engagement were direct email outreach, interest calls, email announcements through the CalSOMAH listserv, external webinars, conferences, and social media.

Per D.24-11-006, the SOMAH PA will begin to formalize how inbound and outbound property owner outreach is reported in this and future SOMAH SAPRs. Figure 35



summarizes direct points of interaction with property owners. The PA was unable to capture IOU service territories for property owners who used the Check Eligibility Form and were unable to connect (via call or email) post form submissions. A field to capture IOU service territories has been added to forms and will be reported in subsequent SAPRs.

Figure 35 – Points of Interaction with Potential Property Owner Applicants

	IOU or Tribal	Initial Interactions
Initiated by Potential Applicant	Liberty	0
	PacifiCorp	0
	PG&E	1
	Tribal	0
	SCE	0
	SDG&E	0
	Unknown IOU Service Territory	65
Initiated by SOMAH PA	Liberty	2
	PacifiCorp	17
	PG&E	64
	Tribal	25
	SCE	106
	SDG&E	3
Total		283

Direct Email Outreach

As one of the primary sources of outreach, the PA sends emails to property owners identified as high priority targets. These emails are sent with the intent of sharing information on the Technical Assistance and Support Services offered through SOMAH,



and to help arrange further discussion with members of the PA on how to learn more about program enrollment. Emails are also sent to owners with the explicit purpose of sharing possible solar savings for their properties. By working with SOMAH's TA team, the PO outreach team can send estimates on annual to 20-year ROIs as well as carbon offsets. Figure 35 shows contacts initiated by the SOMAH PA to property owners and property management companies (PMC). A single PMC can have numerous SOMAH-eligible properties in its portfolio.

This reporting period, direct outreach messaging focused on SOMAH's expanded eligibility requirements by targeting prospective property owners who may have previously been ineligible and/or may have had complications enrolling in SOMAH due to previous eligibility barriers. The primary examples are properties in PacifiCorp and Liberty utility territories. Rural areas, particularly in Northern California, have had trouble entering the program due to low incentive rates; however, integrated storage as well as a change in the EPBB incentive calculation has made this program more feasible for multifamily properties in these service territories. To engage these property owners, the PA initiated multiple outreach strategies to ensure that property owners had various communication touchpoints with SOMAH, including physical mailers. The SOMAH PA intends to continue direct outreach efforts throughout the year to actively target properties that may more easily qualify for SOMAH through the expanded eligibility pathways. Planned activities include identifying co-marketing partners in Liberty and PacifiCorp territories, working with the IOU Tribal Liaisons, and using mailers in conjunction with emails.

Additionally, the SOMAH PA conducted a campaign with quarterly direct outreach emails targeting applicants with canceled applications. Direct outreach messaging focused on troubleshooting previous projects with Technical Assistance and Support Services and identifying other properties in company portfolios.

The SOMAH Program made significant strides to create more financial opportunities for tribal entities to take advantage of solar incentives and focused direct email outreach efforts for tribal entities around these and other opportunities. This year's iteration of the handbook contained two important updates relating to tribal groups. First, it increased incentives for the EPBB calculator suspension for all tribal entities in the PG&E, Liberty, and PacifiCorp service territories. In addition, all tribes will be able to enroll in the Early Payment Pathway during the Reservation Request Milestone, which gives 60% of the incentive payment upfront. Q3-Q4 2025 outreach messaging focused on these updates while also engaging tribes. During this reporting period, tribal outreach was conducted to many of the contacts on the NAHC Contact list in the Liberty, PacifiCorp, and PG&E territories. Information shared included general SOMAH information as well as program updates per D.24-11-006. The SOMAH PA also connected with partner organizations



that serve tribes including the IOU tribal liaisons for SDG&E, SCE, and Liberty service territories as well as the City of Yreka.

Property Owner Outreach Events

The PA attended one in-person conference, which primarily targeted affordable housing audiences, particularly those in Southern California. Additionally, the PA shared information on SOMAH at a series of webinars titled the “Electrification Training Series” in Q3. These webinars reviewed the benefits of clean energy programs, such as SOMAH and our partners, for affordable housing properties. It was aimed at asset managers, developers, and property owners so that they could learn how to maximize utility bill savings.

- Southern California Association for Nonprofit Housing Conference (September 10–11, 2025)
- Electrification Training Series (August 14 & 21, 2025)

Social and Earned Media

The SOMAH PA utilizes social media to inform applicants about program updates and upcoming events. Social media platforms include Facebook, Instagram, LinkedIn, and X. Per D.24-11-006 requirements, the PA cannot distinguish or report on demographic information of followers. Therefore, the PA data reported below is on general follower numbers per platform.

Figure 36 – Social Media Followers

Facebook	Instagram	LinkedIn	X
118	185	549	147

During this reporting period, SOMAH was mentioned in three articles focused on the program's expansion to include incentives for energy storage systems paired with new solar installations. Articles published in *CleanTechnica* (August 12, 2025), *Solar Power World* (July 31, 2025), and *Solar Builder* (July 31, 2025) highlight how California's low-income multifamily property owners and managers can now access significant cost savings and improved energy resilience by adding storage through SOMAH.

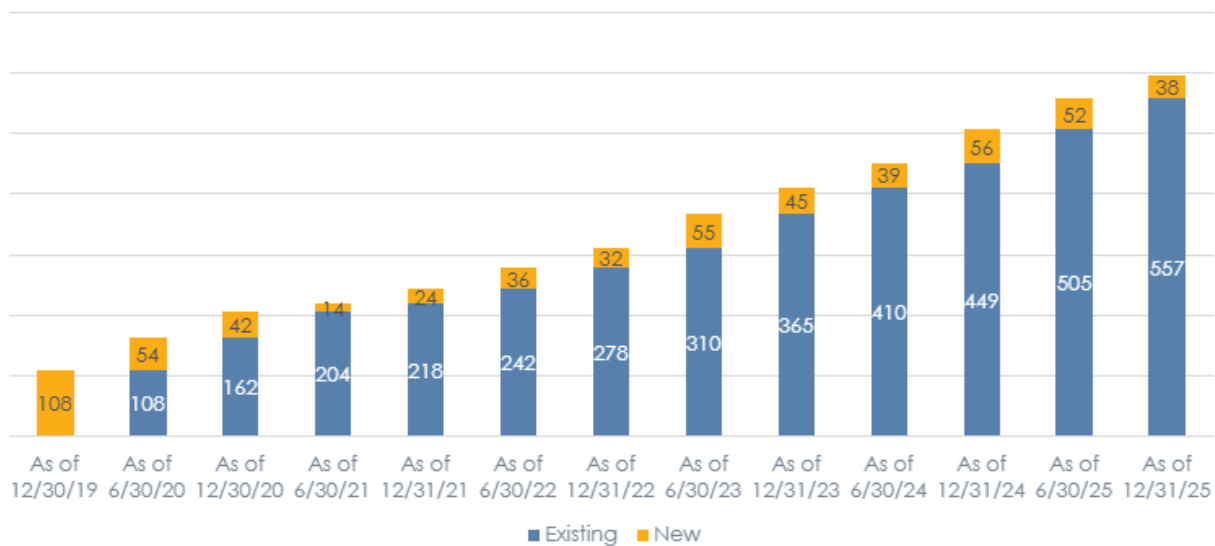
Collectively, the outlets generated substantial potential visibility, with SimilarWeb unique monthly visitor (UVM) figures ranging from approximately 17,900 to 557,700, though the report indicates no tracked social media engagement, journalist shares, or secondary amplification during the period. SOMAH was interviewed by the Chicago Tribune, but



an article has not been published. Overall, the coverage reflects strong penetration within clean energy and solar trade media, reinforcing SOMAH's policy impact and program expansion.

The CalSOMAH email listserv provides important program updates, including funding announcements, program changes, and alerts about upcoming events and webinars. The listserv added 38 additional property owners during this reporting period.

Figure 37 – Property Owner Subscribers Over Time



3.2.5 Tenants

The primary objective of tenant education is to ensure residents of participating properties are aware of the program and able to benefit from SOMAH in an equitable manner.

Tenant Education Services

The SOMAH PA continued to promote Tenant Education Services through quarterly tenant education trainings and webinars. As an essential tool for tenants, the SOMAH PA has prioritized promoting the Tenant Education Hotline, specifically focusing on the hotline during workshops and train-the-trainer sessions. In Q3-Q4 2025, the SOMAH PA received 11 phone calls to the tenant hotline from 10 unique callers connected to four separate SOMAH projects. Offering Tenant Education Services and personalized support from the SOMAH PA facilitates relationship building that leads to tenants being



able to fully realize the benefits of solar through education and self-advocacy. Additionally, through the program's education services, tenants can build trust with program staff and access resources for any questions, issues, or concerns.

A total of nine in-person tenant education workshops were held during this reporting period. Five in-person education workshops were held at properties in the Central Valley and led by Self-Help Enterprises (SHE). Spanish language interpreters were hired to facilitate on-site translation. Two in-person tenant education workshops were held in Olivehurst and led by the California Environmental Justice Alliance (CEJA). There was no additional language interpretation requested at this property. Two in person tenant education workshops were held in Oakland and led by GRID Alternatives with the support of AEA. A Chinese language interpreter was hired to facilitate on-site translation.

The SOMAH PA also continues to review affidavits to ensure the tenant education requirement for contractors and property owners is met (applies only to projects that submitted applications prior to the removal of the requirement). In Q3-Q4 2025, 67 projects submitted tenant education affidavits and reached the designated milestones (e.g., Proof of Project, Incentive Claim). These projects accomplished the tenant education requirements by completing both the first and second outreach touchpoints.

D.24-11-006 eliminated the SOMAH Program's tenant education requirement for contractors and property owners as of July 1, 2025.

The SOMAH PA has revised the majority of resources for the Tenant Education Toolkit and Tenant Education Services with plans to complete one more flyer and then translate all materials in early 2026. The "How will your utility bill change?" flyer will continue development in early 2026 due to extended timelines needed to incorporate IOU feedback. Revisions incorporate the removal of the tenant education requirement as well as recommendations for improvement from previous evaluations and findings from tenant surveys.

Interconnection Impacts on Tenants

As more SOMAH projects reach completion and interconnect with the IOUs, more tenants are becoming aware of the solar projects at their properties and how they will benefit. With the increase in completed projects, the SOMAH PA is actively tracking the amount of time needed for projects to receive interconnection and the time from interconnection to receipt of bill credits. Recent data shows that for completed SOMAH projects, the timeline from construction start to interconnection is averaging over 11



months for the larger IOUs (PG&E, SCE, SDG&E). Additionally, the average amount of time for residents to receive bill credits after interconnection is over two months.

Tenants are central to the SOMAH Program, and the economic relief SOMAH aims to provide tenants is delayed when there are extended timelines for tenants to receive bill credits. The SOMAH PA will continue to work with the IOUs and the CPUC to speed up the interconnection process and shorten the time it takes for tenants to see bill credits—helping ensure they get the value they deserve.

3.2.6 Stakeholders

Stakeholder outreach is an important part of the SOMAH Program's ME&O efforts. SOMAH stakeholders include local government offices, IOUs, CCAs, Regional Energy Networks (RENs), and California energy efficiency program administrators. Building and maintaining partnerships with these stakeholders strengthens the credibility of the SOMAH Program and helps ensure the program reaches target audiences across the state. The goals of stakeholder outreach are to spread awareness of the SOMAH Program and encourage actions such as co-marketing efforts to reach potential participants and ultimately generate new projects.

The SOMAH PA engaged in activities across these key focus areas, including collaborating with energy efficiency programs and the IOUs, speaking at stakeholder-led events and webinars, and developing co-marketing materials. The following sections summarize the PA's accomplishments in Q3-Q4 2025.

IOUs

Throughout this reporting period, the SOMAH PA maintained collaboration with the IOUs: Liberty Utilities, PacifiCorp, PG&E, SCE, and SDG&E. The SOMAH PA met quarterly with representatives of PG&E, SDG&E, and SCE as well as their MFES leads. Per D.24-11-006, the IOUs worked more closely with the PA to decide activities for 2026 co-marketing opportunities, such as IOU news articles featuring SOMAH, social media posts, Tribal Liaison collaboration, IOU website updates, and possible webinars hosted through IOU channels. D.24-11-006 also established high-priority property lists and directed the IOUs to scrub SOMAH property data for potential ineligibility of properties, including flagging properties that are master metered and/or already have solar. As the information gets vetted, the PA will clean up internal property datasets and the public-facing SOMAH eligible properties map. This effort will help the PA and contractors contact eligible property owners. The PA also meets biannually with MFES leads and their CPUC representatives to discuss co-enrolled projects, cross-program coordination, and co-enrollment/program barriers.



In addition, the PA continued to track co-enrollment with the MFES Program. SOMAH has been collecting project referrals from the MFES Program and plans to develop a case study of exemplary projects that have co-enrolled and leveraged incentives from both programs.

Local Governments and Elected Officials

During this reporting period, the PA conducted outreach to six government offices in Northern California, focusing on offices in the Liberty and PacifiCorp service territories. Outreach included the unincorporated areas of Placer and Siskiyou counties and the cities of Weed, Yreka, South Lake Tahoe, and Crescent City. In November, the PA secured a virtual presentation at the Siskiyou and Modoc Counties Housing Developer Workshop hosted by cities of Yreka and Dunsmuir. Agencies in Siskiyou and Modoc counties were in attendance. The SOMAH PA continues efforts to prioritize fostering relationships and participation in communities with lower program engagement.

3.3 Workforce Development

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

- Conducting targeted outreach to job training organizations (JTOs) across the state to engage prospective job trainees and create or enhance sustainable partnerships.
- Empowering SOMAH's CBO partners with tools and resources to connect local job seekers to training opportunities.
- Engaging tenants of SOMAH properties to take advantage of SOMAH job training opportunities.
- Organizing career development workshops and resources for job trainees to promote awareness of job training opportunities and address barriers to employment.
- Supporting contractors with trainee recruitment and workforce development to augment participation in SOMAH and ensure training requirements are met effectively.

Job Training Organization Outreach & Job Trainee Engagement

Completed or nearly completed SOMAH projects have created 981 job opportunities and 61,640 trainee hours. The current SOMAH application pipeline is projected to create 1,481 job training opportunities and 94,360 trainee hours. To broaden SOMAH's pool of eligible job trainees, the SOMAH PA also continues to focus outreach to JTOs



that serve priority populations, such as justice system-impacted individuals, trainees residing in rural areas, and tribal communities.

As of January 2026, there were 95 active JTOs in the JTO Directory. In this reporting period, the SOMAH PA prioritized existing JTO partnerships. Thirty-four new trainees were added to the SOMAH Job Training Portal for a total of 634 job trainees who were engaged on the portal.

The SOMAH PA also worked with CBO partners to inform their local communities about SOMAH's job training opportunities and foster local JTO connections. The SOMAH PA has sought to increase tenant participation in job training opportunities by promoting them through Tenant Education Services. The SOMAH PA continues to engage with job trainees and solar job seekers by facilitating career development workshops. During Q4 2025, the SOMAH PA Workforce Development Team held a webinar for job trainees on the topic of operations & maintenance (O&M), which highlighted different career pathways associated with solar O&M, including 7% of positions in SOMAH training opportunities, growth in this employment sector, and how to find and apply for training programs and jobs.

Contractor Job Training Support

The SOMAH PA supports participating contractors in meeting job training requirements by connecting local job seekers and job trainees from the Job Training Portal to contractors with upcoming installation projects. In this reporting period, the SOMAH PA facilitated eight requests for support with job training from SOMAH contractors. As a result of this support, 100% of SOMAH projects that submitted the Job Training Affidavit with the Incentive Claim Milestone met all job training requirements.

In addition, the SOMAH PA organized programming to help contractors meet their job training requirements and support the program's local and targeted hiring goals. In September 2025, the SOMAH PA hosted a Job Training Overview webinar for contractors that detailed SOMAH's job training requirements and the program's workforce development resources and services. Contractors were provided with a detailed demonstration of the Job Training Portal and how to leverage it to help meet their job training requirements.

3.3.1 Local Hiring and Job Training Data

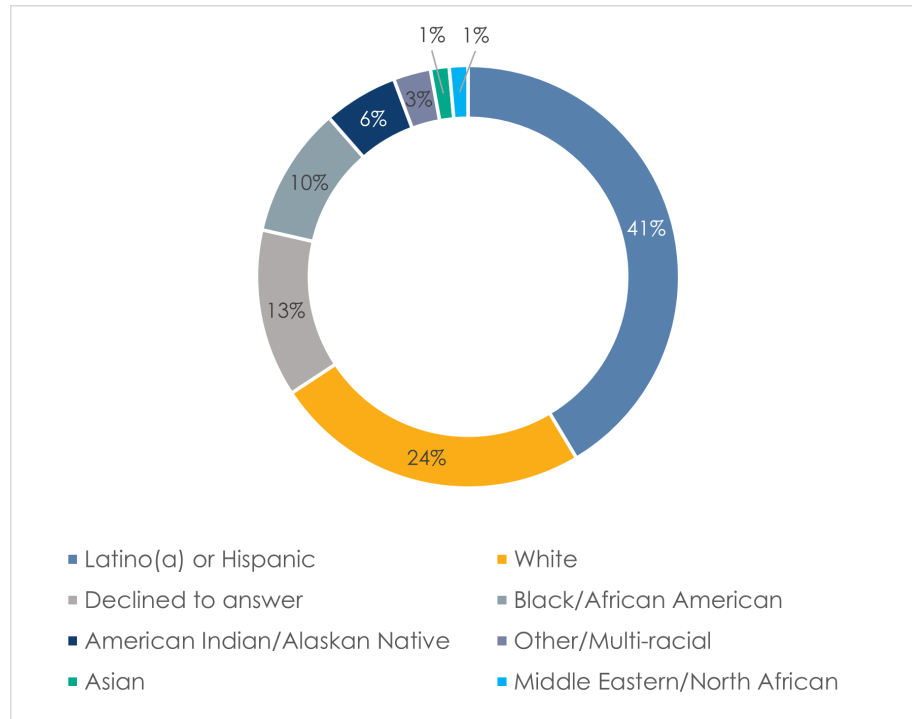
During this reporting period, the SOMAH PA received 64 Job Training Affidavits from projects that reached the Incentive Claim Milestone for a total of 378 projects that have submitted affidavits. The Job Training Affidavits submitted in Q3-Q4 2025 report 103 job training opportunities. To date, 53% of trainees have worked on more than one SOMAH project, gaining enhanced hands-on experience and solar installation skills.



The SOMAH PA has collected and analyzed demographic information for 70 of the 150 job trainees hired through the Job Trainee Intake Form (Figures 38-41 depict findings). Data on job trainee advancement (i.e., the number of SOMAH trainees who became full-time solar employees) and retention is collected through surveys to contractors after each project reaches the Incentive Claim Milestone. To date, the SOMAH PA has received 878 job training surveys, with 22 job trainees reported as hired by contractors for continued employment. The following statistics provide a breakdown of local and targeted hires:

- 86% of job trainees were targeted hires.
- 36% of job trainees reside in DACs.
- 17% of job trainees were local hires living in the same county as the SOMAH project.
- 44% of job trainees reported being unemployed or underemployed at the time of SOMAH intake.
- 26 tenants of SOMAH properties participated as job trainees.
- 43 job training organizations have students or graduates who have participated in SOMAH job training opportunities.
- Average trainee hourly wage: \$48.87.
- Average training hours per project per trainee: 57.

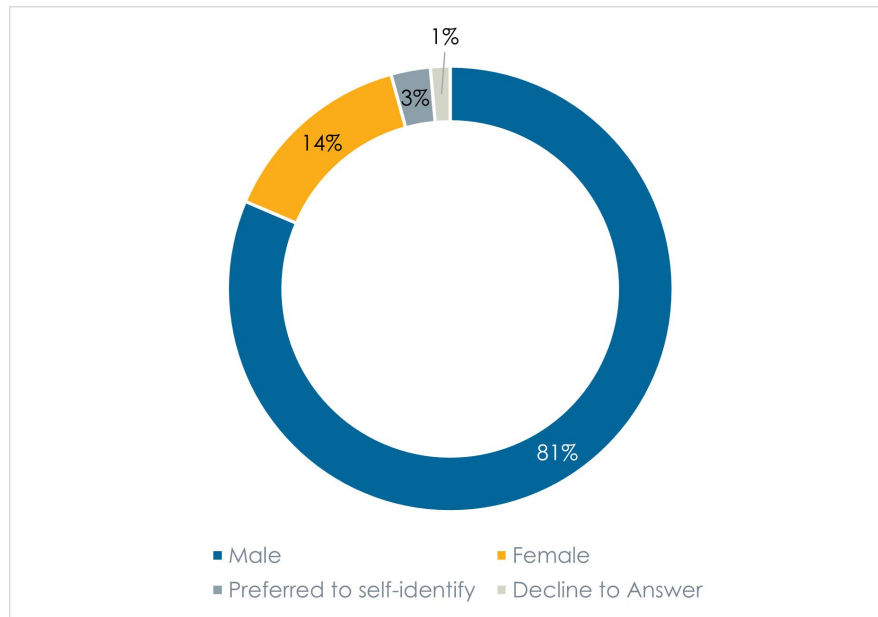
Figure 38 – Job Trainee Race/Ethnicity Breakdown



N = 70

Figure 38 is a snapshot of SOMAH project job trainee breakdown by race/ethnicity. Latino(a) or Hispanic trainees comprise the majority of SOMAH trainees, totaling 41%.

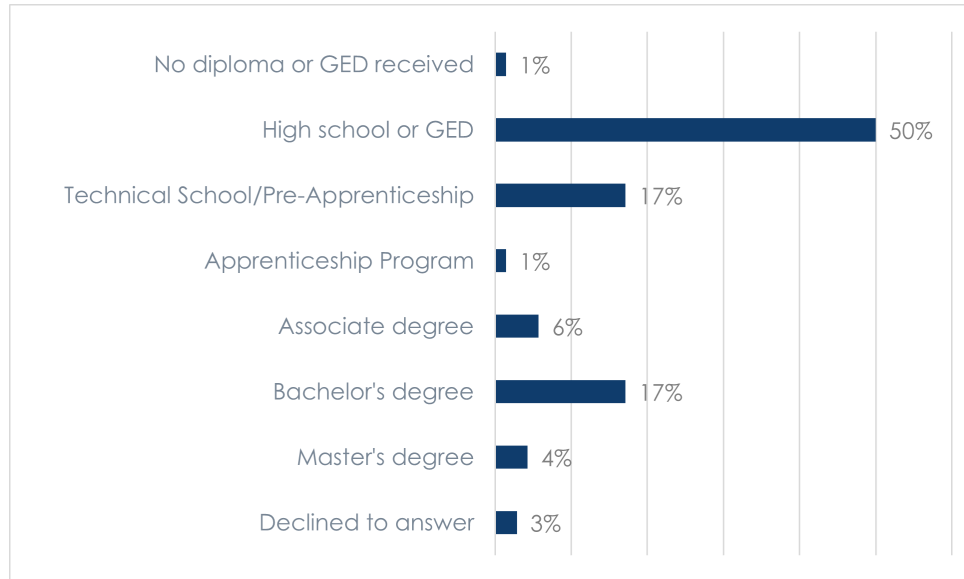
Figure 39 – Job Trainee Gender Breakdown



N=70

Figure 39 is a snapshot of SOMAH project job trainee breakdown by gender. Most trainees (81%) identify as male, while 14% identify as female.

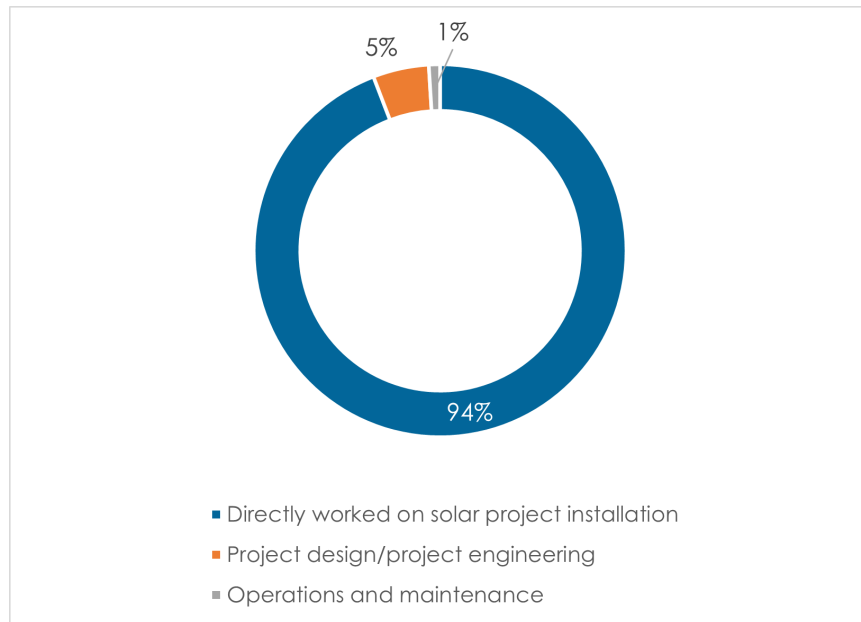
Figure 40 – Highest Level of Job Trainee Education



N = 70

Figure 40 is a snapshot of SOMAH project job trainee breakdown by the highest level of education attained. A total of 69% of job trainees participated without a college degree, while 18% of trainees participated after attending a technical school/pre-apprenticeship or apprenticeship program.

Figure 41 – Percentage of Trainee Placements by Project Role



N=103

Figure 41 is a snapshot of SOMAH project job trainee breakdown by project role placements, with 94% of tasks assigned being directly related to solar installation.

Figure 42 – Average Trainee Wage Compared to CA Minimum Wage

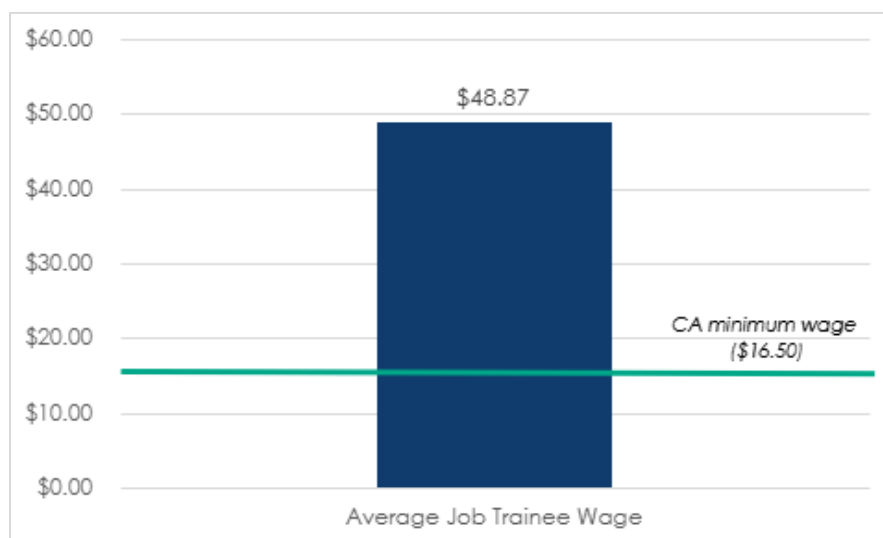




Figure 42 is a snapshot of SOMAH project job trainee average wage relative to California's minimum wage. On average, SOMAH job trainees earn \$48.87/hour, greatly surpassing the California minimum wage of \$16.50/hour.

The SOMAH PA does not oversee compliance with prevailing wage requirements and does not report on those wages.

Figure 43 – Hours per Job Trainee Placement

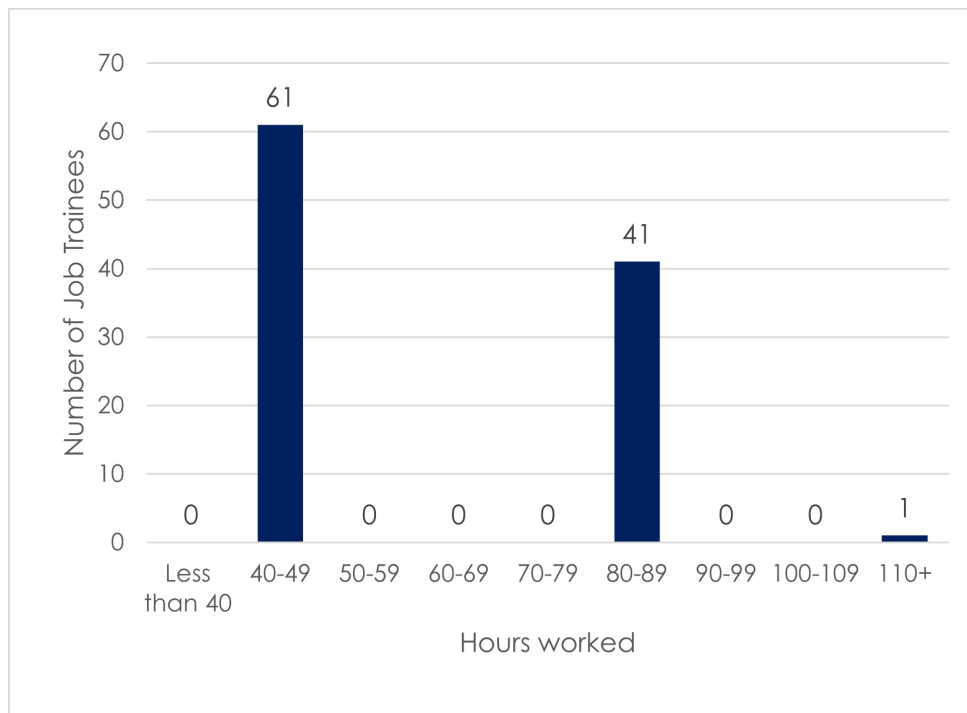
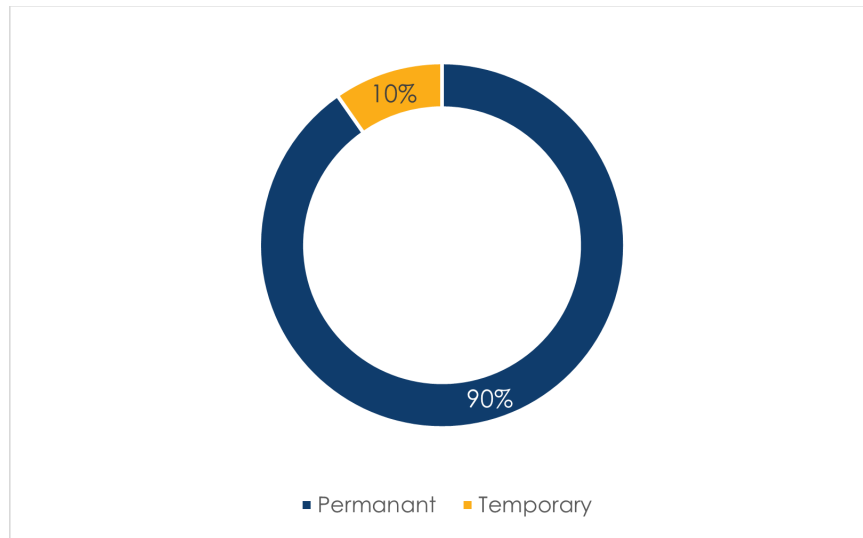


Figure 43 is a snapshot of the number of SOMAH job trainees and the hours they worked. Most trainees worked more than 40 hours on their project, with 59% of trainees working 40-49 hours and 39% of trainees working 80-89 hours.

Figure 44 – Percentage of Trainee Placements by Employment Status



N=103

Figure 44 is a snapshot of SOMAH project job trainee breakdown by employment status for this reporting period, with 10% of trainees classified as temporary workers during their tenure with a contractor and 90% hired as full-time employees.

3.4 Community-Based Organizations

During this reporting period, six community-based organizations continued to support the program through direct outreach to tenants, property owners, potential job trainees, and local stakeholders. Three of the environmental justice organizations that have supported the implementation of the program have ended or will be ending their partnerships due to shifting organization priorities: Asian Pacific Environmental Network (APEN), Environmental Health Coalition (EHC), and California Environmental Justice Alliance (CEJA). In December 2025, the SOMAH PA entered a contract with Power Direct Energy (PDE), a women-owned organization that will be focusing on property owner outreach in the San Diego region starting in 2026.

The SOMAH PA hosted the last in-person CBO summit at the California Community Foundation in Downtown Los Angeles in October. The event brought together all partners and program administrators to share program updates, lessons learned, and new potential opportunities.



Topics covered during the Q4 CBO Summit included:

- Future of CBO Partnerships
- Updates on Fleet Monitoring & Battery Storage Introduction
- Round Robin Program Share Out

CBOs conducted 341 outreach activities to engage property owners through cold calls, emails, one-on-one meetings, presentations, ad campaigns, social media posts, and on-site property visits.

Figure 45 shows the number of direct points of contact with property owners in CBO partners' service areas. Their service areas cover the Central Valley, Central Coast, and South/Southeast Los Angeles, Orange County, Riverside, and San Bernardino counties.

Figure 45 – Points of Interaction with Potential Property Owner Applicants

	IOU	Initial Interactions
Initiated by SOMAH CBO	PG&E	33
	SCE	900
	SDG&E	103
Total		1036

The Niles Foundation (TNF) kicked off their first event in a series of property owner-focused luncheons in November, held at the California Community Foundation in Downtown Los Angeles. The audience included property owners in the SCE region, with 24 registrants and six representatives in attendance. The next SOMAH property owner luncheon will take place early February 2026.

During this reporting period, CBOs attended six external events aimed at connecting with property owners and stakeholders to raise program awareness and bring in new applications:



- Communities for a Better Environment (CBE) attended the Annual Interface Affordable Housing Southern California (August 2025) (SCE).
- Self-Help Enterprise (SHE) tabled at San Joaquin Valley Housing Collaborative's two-day 14th Annual Affordable Housing Summit (September 2025) (PG&E).
- Community Environmental Council (CEC) tabled at 2025 Ventura County Housing Conference (October 2025) (SCE).
- The Niles Foundation (TNF) tabled at Bisnow's two-day Multifamily Annual Conference West (November 2025) (SCE).
- Communities for a Better Environment (CBE) attended the two-day California Housing Community Development Conference and Expo (December 2025) (SCE).
- Community Environmental Council (CEC) attended the 2025 Santa Barbara Housing Conference (December 2025) (SCE).

CBO partners continue to engage with local stakeholders to explore potential co-marketing opportunities and introduce the SOMAH Program to their constituents. During this reporting period, CBOs participated in 53 outreach activities to engage with local government stakeholders. Through OC Goes Solar's (OCGS) fruitful partnership with Orange County Power Authority, OCGS was able to connect with property owner leads in Buena Park, Fullerton, Irvine, and Orange. California Environmental Justice Alliance (CEJA) connected representatives of San Diego Community Power, Inland Regional Energy Network (I-REN), and County of San Diego with the SOMAH PA to explore partnership opportunities.

CBOs have led seven educational Tenant Education workshops for residents where they were able to answer tenants' questions, especially about changes at their property and to their utility bills. SHE provided continued tenant education workshops at four properties (PG&E) in collaboration with Fresno Housing Authority (FHA) and one tenant education workshop at the Mendota Garden Apartments (PG&E). CEJA led two tenant education workshops at Olive Tree Senior Citizen Apartments (PG&E) in July. Workforce development support will continue to be tied closely with tenant education. CBOs will continue to share job training resources with their community members, such as the HeatSpring Academy or the Job Training Organization Directory, whenever applicable to their outreach to property managers.

CEC's scope of work also includes contractor engagement. During this reporting period they participated in one outreach activity to engage contractors in the Central Coast, informing them about program requirements and upcoming Applicant and Contractor Eligibility Training Webinars. They also referred an interested contractor, Perry Waltrip Electric, to the PA for additional information on how to participate in the program.



CBO partnerships have proven to be paramount in ensuring SOMAH outreach messaging and materials are informative and intentional in reaching multifamily affordable housing providers, tenants, local stakeholders, and potential job trainees across the state. In 2026, our contracted CBO partners will continue the momentum of prioritizing in-person property owner engagement and build upon stakeholder connections for co-marketing opportunities and support with connecting with property owners in their regions.

(Note: Due to reporting requirements in CBO contracts, the KPIs above include the total number of outreach efforts in Q2-Q4 2025).

3.5 Technical Assistance

Offering a suite of Technical Assistance and Support Services provides everyone involved in a SOMAH project with direct access to program benefits. Installing solar PV on existing multifamily housing requires dealing with complex issues like ownership agreements, financing structures, and cost-benefit projections—all areas where SOMAH can help. SOMAH is designed to provide no-cost and no-obligation personalized technical assistance services to help bridge knowledge gaps and facilitate solutions to common challenges as property owners and solar contractors consider, plan, and install solar PV systems.

SOMAH's Technical Assistance and Support Services cover a wide range of project-related elements, including solar feasibility, financial analysis, strategies for integrating energy storage, tenant education, and interconnection support, as well as referrals to other energy efficiency programs. SOMAH's Technical Assistance and Support Services extend from before a project exists, to the planning stages, to continued support after a project is complete. This means that SOMAH can offer support to all interested SOMAH participants, whether they have enrolled in SOMAH or are still considering program enrollment.

SOMAH's Technical Assistance and Support Services are offered with the goal of providing consumer protection, reducing the burden of participation, and increasing access to objective expertise and resources. It is vital for SOMAH to continue offering objective third-party expertise and resources. In doing so, SOMAH can balance the information provided by solar contractors to ensure property owners and tenants are receiving objective unbiased information related to their solar PV installation.

With SOMAH now offering incentives for integrated energy storage, SOMAH's Technical Assistance and Support Services have expanded to include resources and strategies for integrating energy storage with solar PV projects. Integrating energy storage with solar



PV systems interconnected through VNEM may be a new approach for property owners and solar contractors alike. SOMAH's support services are available to help navigate the complex project hurdles as they relate to both design and utility challenges. The SOMAH PA understands the benefits that integrated energy storage can bring to communities that the program was designed to serve—supporting utility rate optimization, resiliency, and grid stability—and will continue to make support and resources available to projects seeking assistance.

3.5.1 TA and Support Services

Understanding that all parties involved with a solar project may need support throughout the installation process, SOMAH's Technical Assistance and Support Services can be requested at all stages as property owners and solar contractors consider, plan, and install a solar PV system.

For the reporting period, 17 requests were made for Technical Assistance and Support Services. Of these, 75% were initiated by solar contractors, representing 10 unique solar contractor companies. Among those, seven solar contractor companies do not have active SOMAH projects. This means that solar contractors who are new to the program are utilizing the program's support services to receive general support to better understand program requirements as well as establish a point of contact to consult when questions or program enrollment hurdles arise.

Of the 17 requests made, 81% were not connected to active SOMAH projects. With these requests made by both property owners and solar contractors, this confirms the challenges and complexities that exist when planning for solar PV at existing multifamily properties and the support that is needed to get projects off the ground. With financing being one of the largest roadblocks in moving projects forward, it is crucial for solar contractors and property owners to receive guidance on navigating program nuances to secure incentives.

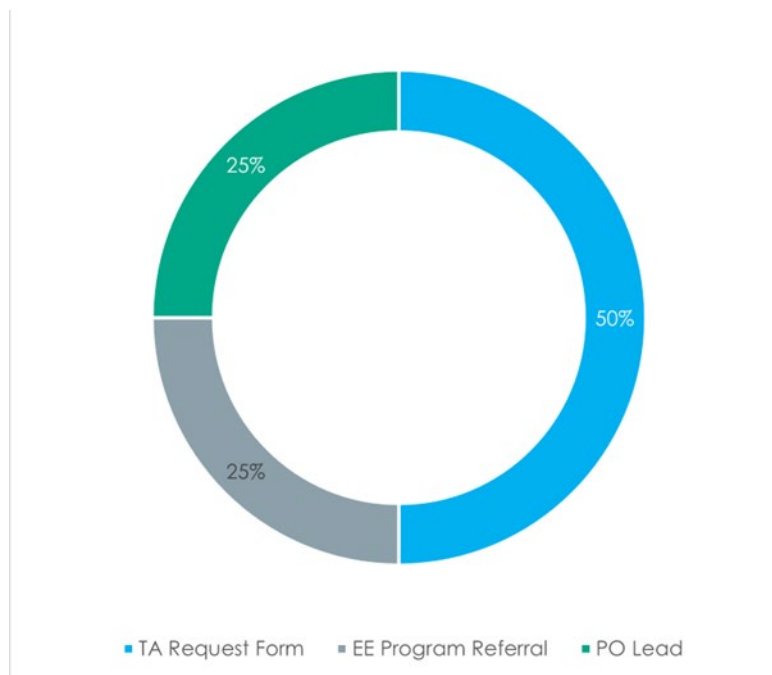
The most frequent service requested was General Support (31%). Requests were made by solar contractors who have not submitted a Phase 1 Reservation Request Package yet and faced challenges as well as solar contractors who are working with property owners to traverse tricky HUD agreements to prove program eligibility. Twenty-six percent of the services requested were for solar feasibility support and TA Preview Reports. For the reporting period, four Technical Assistance Preview Reports were created and presented to prospective property owners and solar contractors. While the preview report was initially designed to help property owners decide if SOMAH enrollment is right for them, the number of reports requested by solar contractors this reporting period confirms the need from solar contractors to peer review design, confirm estimated program incentive amounts, and learn how to market the program



to clients. The concise two-page preview report is customized for each unique property and includes a preliminary solar PV system design and sizing, estimated incentive amount, and financial analysis. The preview report allows property owners to weigh the prospective costs and benefits of installing solar. Upon receipt of the preview report, property owners are connected to a single point of contact who can provide education and access to SOMAH resources as well as initiate the SOMAH enrollment process if that is the desired next step.

Figure 46 summarizes the sources of the preview report requests in Q3-Q4 2025. It is notable that 50% of the requests for preview reports came from solar contractors who submitted a TA Request form. This type of available support for contractors is invaluable to the program. The contractor who requested the preview reports during this reporting period is on their way to enrolling the two projects.

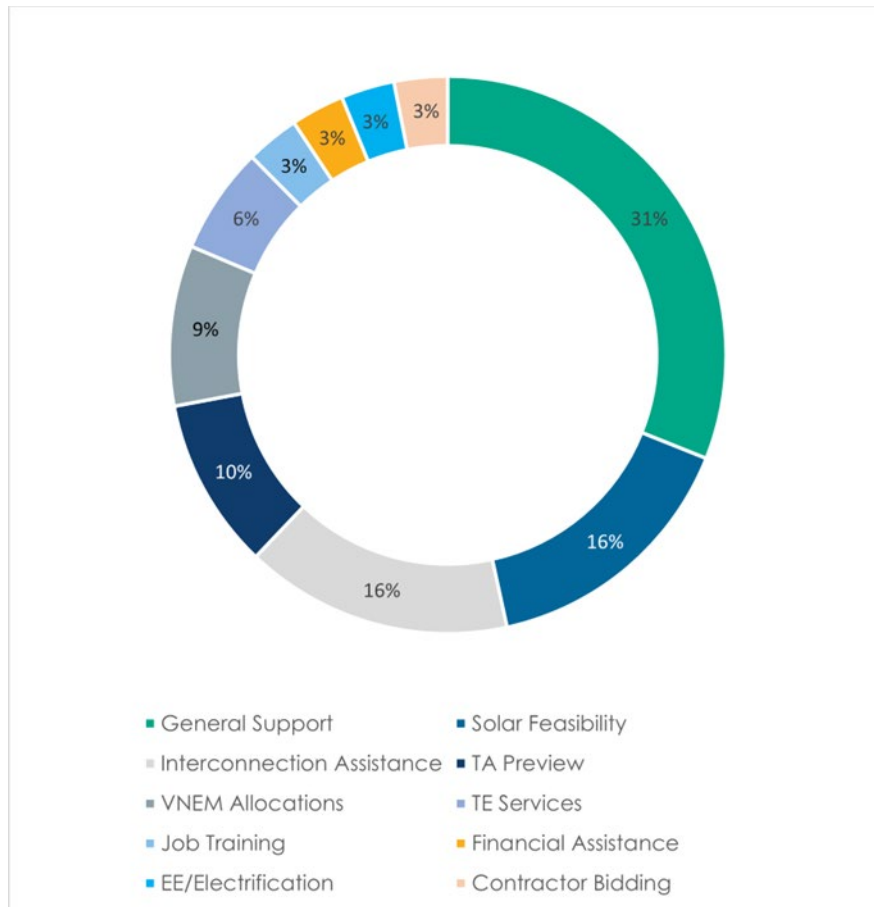
Figure 46 – Technical Assistance Preview Report Request Summary



N=4

Figure 47 summarizes the service types requested in Q3-Q4 2025. Understanding what service types are requested the most allows SOMAH to expand program resources and support services to better guide, educate, and meet specific needs.

Figure 47 – Breakdown of TA and Support Service Request Types



N=32

3.5.2 Upfront Technical Assistance

Upfront Technical Assistance (TA) services are designed to provide property owners with educational, technical, and financial resources to facilitate their solar PV installation. Offering Upfront TA services sets SOMAH apart from similar programs and provides property owners who may be less familiar navigating solar PV projects with equal access to program benefits. Not only do SOMAH's Upfront TA services allow property owners to receive customized support as they navigate the solar journey, but the services shed light on the challenges property owners face that might otherwise halt a project from moving forward. As a result, by offering Upfront TA services, more projects



are successfully completed, and more low-income residents receive the program's benefits.

Property owners receiving Upfront TA services are connected to an Energy Project Manager who serves as an objective third-party resource to answer questions and provide guidance and support as needed. While most of the support is provided to property owners during the initial project feasibility and solar contractor selection phases, the Energy Project Manager can maintain the trusted relationship created with the property owner and provide support even after a Reservation Request Package has been submitted. The Energy Project Manager serves as a single point of contact for the property owner across project phases and program milestones.

Property owners enter Upfront TA with varying levels of solar knowledge. Through guidance from their Energy Project Manager, each property owner receives personalized support to accommodate their specific needs, including:

- Understanding the SOMAH Program process.
- Comprehensive solar assessment for their property or portfolio.
- Customized solar feasibility reports, including remote site assessments, incentive calculations, and potential energy savings.
- Tools and metrics to help property owners source and compare eligible solar contractor bids with confidence.
- Guidance on financing options, ownership structures, and resources for leveraging federal tax credits.
- Strategies for integrating energy storage with the SOMAH-incentivized solar PV system.
- Integration with energy efficiency and electric vehicle charging programs.

To date, 51 projects have received Upfront TA services. Of those, 22 projects are currently receiving Upfront TA services, 15 projects are now at a later milestone in the SOMAH application life cycle, and 14 canceled after receiving Upfront TA services. Upfront TA services are designed to equip property owners with resources and practical education in order to make an informed decision about pursuing solar PV at their property. Outcomes where property owners decide that solar is not right for their property after being supplied with support customized to their property can still be viewed positively.

A cornerstone of SOMAH's Upfront TA services is examining the solar PV projects holistically by considering energy efficiency and electrification upgrades at the same time as solar PV. This approach is unique to SOMAH and a consideration that may often be overlooked for projects that do not receive Upfront TA services. A holistic approach often can be a catalyst for larger, more impactful improvements in these properties,



therefore delivering greater benefits for the low-income tenants the program is designed to serve.

SOMAH's Energy Project Managers provide thorough evaluations of a property's existing conditions and systems to facilitate referrals and enrollment in appropriate energy efficiency, electrification, and/or electric vehicle charging programs. The saying "reduce before produce" applies here; however, by switching from fossil fuels to electricity for heating, appliances, and cooking, the solar PV system incentivized through SOMAH can make a larger impact for fighting climate change, improving public health, and saving money. As a result, over 60% of projects receiving Upfront TA services are pursuing deep energy retrofits in conjunction with solar by enrolling in comprehensive energy efficiency programs. Deep energy retrofits bring benefits to both residents and property owners. Residents receive improved indoor air quality, increased building safety, and enhanced comfort during every season. Property owners benefit from reduced operation and maintenance costs, amplifying overall property savings, and maximizing the benefits from the solar PV system.

For example, six properties that received Upfront TA services are part of a larger portfolio from a housing authority that are enrolled in the Low-Income Weatherization Program and the Multifamily Energy Savings Program and are receiving holistic, wrap-around services to facilitate full electrification scopes paired with solar PV at each property. The success of these first six properties will serve as a guide and gateway for the housing authority's remaining portfolio. Providing this guidance and related support services is the exact reason SOMAH's Upfront TA services exist.

Two additional portfolios have been the focus of Upfront TA during the reporting period. One affordable housing developer is currently receiving Upfront TA services for six properties in their portfolio. The six properties are laying the groundwork for their larger portfolio by forging a path to include renewable energy in their preservation and rehabilitation of affordable communities. Another affordable housing developer initially enrolled three properties in SOMAH with the support of a solar contractor. Due to unforeseen circumstances, the solar contractor could no longer serve the projects. Rather than cancelling the projects, the owner is actively receiving Upfront TA services to not only understand the solar PV potential of the three projects currently enrolled, but the potential for their larger portfolio of over 10 properties. Furthermore, the owner is receiving holistic, wrap-around services to facilitate energy efficiency and electrification upgrades at the properties.

SOMAH's Upfront TA services have proven to be a pathway to increase connections with solar contractors who may be less familiar or less active with the program. Through the solar contractor bidding and selection process for a project in Q1 2025, a solar



contractor who received a request to submit a project bid decided to complete the steps to become a SOMAH eligible contractor. In the end, the contractor was selected as the winning contractor and now has 10 active applications with SOMAH, with more on the way. Similarly, a solar contractor with no active SOMAH applications was selected as the winning contractor for another project receiving Upfront TA services. Since then, they have utilized the trusted single point of contact established during Upfront TA to develop projects to enroll in SOMAH. Lastly, one property receiving Upfront TA services, located in Eureka, presented a unique set of challenges to overcome. One challenge was that the property is recognized as a historical building, and another challenge is its Northern California location, making the solar contractor bidding selection process more difficult. The result of a lengthy and intricate bidding process was the selection of a solar contractor local to the area and new to SOMAH. To date, most SOMAH applications are contractor-led. SOMAH's Upfront TA services are paving the way for more solar contractors to be introduced to the program, in turn increasing contractor diversity and program applications.

SOMAH's Upfront TA services are designed to tackle challenging and complicated situations, which means the services must continually evolve to improve program resources and guidance. One area that is constantly evolving, and SOMAH resources with it, is the Investment Tax Credit (ITC). SOMAH continues to partner with a tax professional organization who can offer cost-effective audit, tax, and consulting services for projects receiving Upfront TA services. The consulting services are available to provide property owners and developers with guidance specific to the ITC, which supports customer protections and resource sharing on the latest tax news updates. During this reporting period, key details about the ITC were changed. To capture the changes, a [resource](#) was prepared and added to SOMAH's resource library that breaks down what these changes mean, offers a practical playbook for property owners navigating the new landscape, and highlights the critical deadlines property owners need to know to stay on track.

In sum, of the projects participating in Upfront TA, the average estimated system size for the 37 projects is 126.75 CEC-AC kW with an average expected aggregate annual output of 200,450 kWh. Resident benefits are always a central pillar and focus area for projects receiving Upfront TA services. For the 37 projects that have received or are currently receiving Upfront TA services, over 80% of the clean energy produced from the solar PV systems is projected to directly benefit the more than 1,900 low-income households via virtual net metering (VNEM) bill credits, offsetting over 89% of their expected historic electrical consumption.

Figure 48 outlines additional system statistics across the IOU territories for the projects.

Figure 48 – Track A Summary

IOU	Number of Active Track A Projects	Estimated SOMAH Incentive	Estimated System Size (CEC-AC kW)	Expected Aggregated Annual Output (kWh)
PG&E	24	\$7,959,883	2,954	4,402,634
SCE	5	\$2,521,195	922	1,532,900
SDG&E	2	\$290,161	100	197,486
Liberty Utilities	0	\$0	0	0
PacifiCorp	0	\$0	0	0
Total	31	\$10,771,239	3,976	6,133,020

3.5.3 Fleet Monitoring

SOMAH's Technical Assistance and Support Services extend to include continued support after a project is completed. Fleet monitoring is a SOMAH Program requirement to ensure SOMAH-incentivized PV systems are performing as expected and the direct financial benefits for both property owners and tenants are fully realized. SOMAH monitors the performance of completed systems monthly to ensure they are performing as expected and provides notifications if any potential performance issues are identified. SOMAH's fleet monitoring is an investment in the longevity of the solar PV systems, but it does not replace standard operating and maintenance procedures, as the solar PV system owner is solely responsible for facilitating regular maintenance.

As of December 31, 2025, 370 of the 386 completed SOMAH PV systems are connected and monitored in SOMAH's fleet monitoring platform SunSpot. SunSpot identifies SOMAH systems that are underperforming compared with expected performance. If a solar PV system is identified as underperforming, the SOMAH PA reaches out to project contacts to discuss potential problems and investigative steps necessary to improve system performance.

To date, the total solar generating capacity reported in SunSpot is over 44.7 MW CEC-AC (over 114 million kWh); and overall, the fleet of completed SOMAH projects is



performing at 80% of their expected level (percent of expected), showing growth in performance compared to the previous reporting period. SOMAH is committed to monitoring completed systems to maximize system production, as this translates to direct economic relief for low-income tenants. As an example of SOMAH's commitment to monitoring and maximizing system production, whenever SunSpot identifies underperforming systems, project contacts are notified, and lines of communication are opened to discuss any issues with system equipment or in general that may be causing underperformance.

Further, more complex monitoring issues have been identified and addressed through SOMAH's fleet monitoring platform. A metering arrangement within a specific inverter manufacturer, the most installed manufacturer in SOMAH, was causing the full production of a system to underreport, or in some cases overreport, on the inverter's online monitoring platform and therefore not sync in SunSpot. Through a detailed analysis, the SOMAH PA discovered that over 24 projects were impacted by the metering arrangement. After direct communication with the installing solar contractor, and further investigation and troubleshooting, the contractor reported issues with the inverter meter and initiated replacements. Continued monitoring post replacement showed increased production alignment between the inverter's online monitoring platform and SunSpot for the impacted projects. Other systems continue to have underreporting or overreporting issues; the PA will continue to analyze these issues and work with contractors to reach a resolution.

To further support property owners and solar contractors after their solar PV system is completed and interconnected, the SOMAH PA continues to promote post-install [resources](#) that cover the best operations and maintenance (O&M) practices for solar PV systems and provide tips for monitoring system performance. These resources can be used to learn how an O&M plan can ensure the long-term functionality of a system and how to track system performance over the system's lifetime. The resources also include information for on-site staff and those who may interact with the system regularly. Currently, the resources include information for the most installed inverter manufacturers in SOMAH. To provide the best support for all projects participating in SOMAH, the library of resources will continue to grow to cover additional inverter manufacturers that are installed through the program.

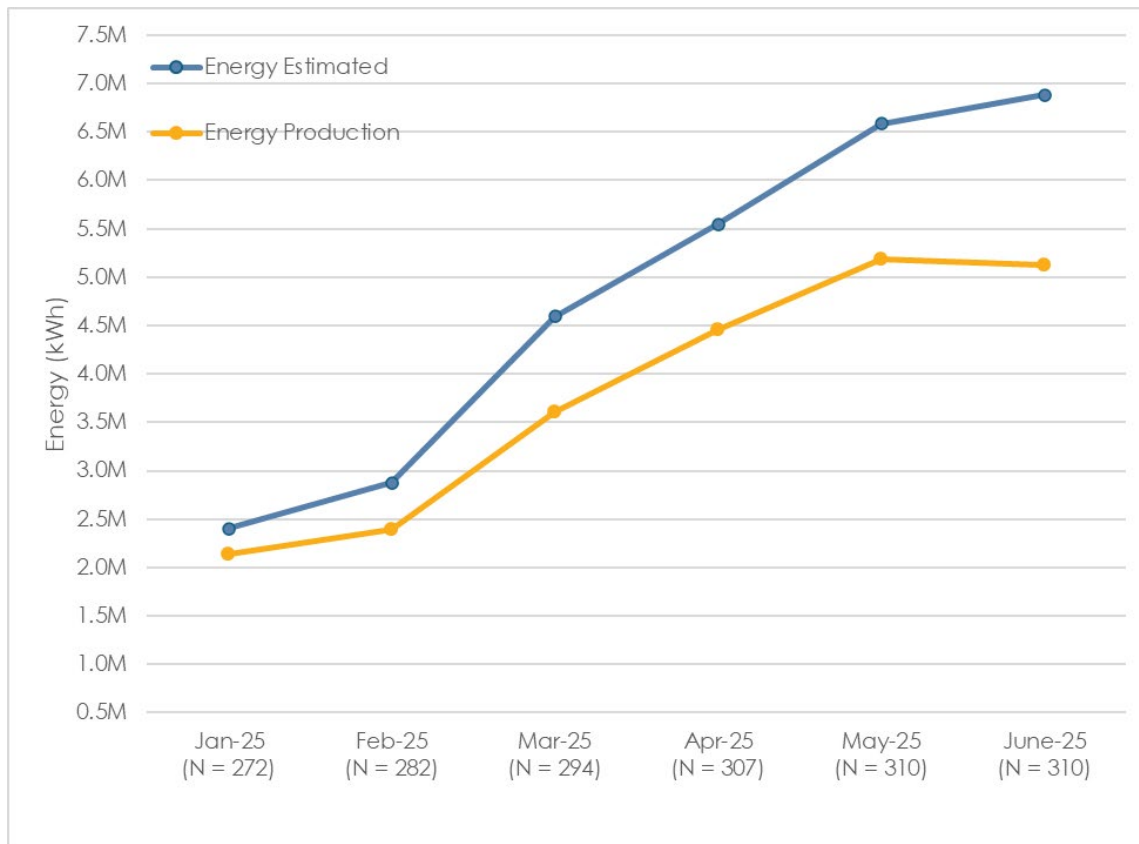
Fleet monitoring data for Q3-Q4 2025 is summarized as:

- 370 systems monitored.
- 44.7 MW of capacity.
- 23.68 GWh of production.
- Percentage between production and estimate 77%.



- Approximate emissions avoided based on MW capacity using EPA AVERT tool: 11,160 tons of CO₂.

Figure 49 – Estimated Versus Actual System Performance



Several factors could contribute to the underperformance of completed SOMAH systems compared to their estimated production as depicted in Figure 49. Seasonality and equipment failures are among the top reasons; however, some systems may experience a loss in communication from the inverter to the monitoring portal even though the system is still producing as expected. If systems experience equipment failures, the resulting warranty claims often have long wait times to replace and/or repair the failed equipment. In turn, extended system underperformance can occur until the equipment is replaced.

SunSpot detects a wide range of production variations, from systems that have lost production entirely to systems with equipment issues that are now back to producing as expected. SOMAH's fleet monitoring offering has been an invaluable tool for tracking system performance, opening lines of communication with system contacts to better



understand system issues and confirming that installed SOMAH systems are providing the expected benefits to the low-income residents the program is designed to serve.

Figure 50 – Completed SOMAH Systems Being Monitored



4. Program Planning and Development

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

Official Record Maintenance

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

- SOMAH Incentive Budget Report and Working Data Set (updated weekly)
- Semiannual Progress Report
- Semiannual Expense Report
- Annual Marketing, Education, and Outreach (ME&O) Plan

Place of record: https://www.californiadgstats.ca.gov/programs/#_subsection_17



- Special reports to the California Legislature
- Third-party evaluations and reports

Place of record: <https://www.cpuc.ca.gov/somah>

During this reporting period, the SOMAH PA highlights: 1) an update on activities related to reporting, feedback, and accountability; 2) an overview of evaluation efforts; and 3) program design updates, including the CPUC Decision D.24-11-006 issued on November 14, 2024.

4.1 Reporting, Feedback and Accountability Mechanisms

The SOMAH Program has several accountability and feedback mechanisms to ensure key stakeholders are provided opportunities to contribute to program development and implementation. These include an advisory body, public forums, and monthly working meetings with the participating SOMAH IOUs.

4.1.1 Public Forums

SOMAH public forums are held as needed throughout the year to allow the SOMAH PA to 1) share program updates, 2) propose program modifications and design changes, and 3) solicit feedback from program stakeholders about their experiences with the program, including challenges, barriers, and areas for improvement. The SOMAH PA publishes the presentation slide decks and meeting notes, including stakeholder questions and SOMAH PA answers, via the CalSOMAH.org website following each public forum.

During this reporting period, one public forum was held on August 13, 2025. Sessions included:

- General program update
- Program handbook & storage updates
- Removal of tenant education requirement and update on tenant education resources

4.1.2 IOU Working Group

During the reporting period, the SOMAH PA held six IOU Working Group meetings. The Q3-Q4 2025 working group meetings focused on the following topics:

- July 2025 – General program and marketing coordination updates, tenant education hotline project updates, high priority properties list, PA/ED/IOU Final Decision implementation syncs.



- August 2025 – General program and marketing coordination updates, tenant education hotline project updates, long-term IOU budget forecasting, CPUC Final Decision implementation syncs.
- September 2025 – General program and marketing coordination updates, tenant education hotline project updates, CPUC Final Decision implementation syncs, quarterly bill credit reports, annual ESA/MFWB referral request.
- October 2025 – General program and marketing coordination updates, tenant education hotline project updates, CPUC Final Decision implementation syncs, quarterly VNEM bill credit memos, high priority properties list, annual ESA/MFWB referral request.
- November 2025 – General program and marketing coordination updates, tenant education hotline project updates, CPUC Final Decision implementation syncs, quarterly VNEM bill credit memos, high-priority properties list.
- December 2025 – General program and marketing coordination updates, tenant education hotline project updates, AB 1207 and SB 355, quarterly VNEM bill credit memos, high-priority properties list, pending IOU queues, program and policy updates.

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

4.1.3 SOMAH Advisory Groups

SOMAH currently has one advisory group, the SOMAH Advisory Council. This group helps the program remain accountable to the communities it was designed to serve.

Advisory Council

The SOMAH Advisory Council (SOMAH AC) has two main purposes: 1) to ensure the voices and interests of equity-focused community advocates and key stakeholders remain at the center of the SOMAH Program; and 2) to make certain SOMAH maximizes benefits to low-income tenants and DACs by advising the SOMAH PA on program development and implementation. Presently, the SOMAH AC is composed of 15 members representing the fields of environmental justice, workforce development/labor, tenant rights and economic justice, affordable housing, tribal communities, and the solar industry. The SOMAH AC was expanded in 2025 to accommodate participation from JTO Task Force members as that group was sunset. However, the next cohort will be capped at 13 members.

The SOMAH AC meets virtually on a quarterly basis. During this reporting period, there were two meetings, one in September and another in December.



Q3 2025 SOMAH AC meeting topics included:

- General program update, including the SOMAH PA's progress in implementing directives from D.24-11-006.
- Overview of the average SOMAH project timeline.
- Report-out from the SOMAH AC's working groups.
- Update on storage integration into the program.

Q4 2025 SOMAH AC meeting topics included:

- General program updates including an overview of success stories, updates on individual program areas, and outreach efforts by audience type.
- Vote on making updates to the SOMAH AC bylaws, formalizing the optional working groups, and updating the replacement process.
- Summary of the application process for the next SOMAH AC cohort.
- Report-out from the SOMAH AC's working groups.
- Celebration of accomplishments for the program in 2025.

The Q4 SOMAH AC meeting is the last for the current cohort. Applications for open spots on the fourth iteration of the council are set to be released in January 2026, and the new cohort will begin meeting in Spring 2026.

4.1.4 Third-Party Program Evaluation

As directed by D.17-12-022, the CPUC Energy Division (ED) provides regular evaluations of the SOMAH Program to the state legislature. Verdant Associates has operated as the third-party evaluator for the SOMAH Program for Phase I and Phase II evaluations, the 2022 Vendor Assessment Report, and the 2023 Triennial SOMAH Evaluation Report. These evaluation efforts are designed to assess program impacts and progress on metrics and reaching program goals. The [CPUC website](#) maintains records of all files relating to the SOMAH evaluation reports.

The next evaluation is slated for 2026. In Q2 2025, the SOMAH PA began its engagement with the evaluators, which included data requests and discussions regarding program operations and program performance. The PA continued to engage with the evaluators in Q3 and Q4 and will finish providing data to the evaluators in Q1 2026. Taken together, feedback and input from key audiences, participants, stakeholders, and advisors will help inform and modify program areas to ensure the approaches are successful in reaching the audiences and communities SOMAH is designed to serve.



4.2 Program Design and Updates

This section provides an overview of program design changes and prospective changes as well as updates on related regulatory activity. See Section 3.1.1, Applications and Incentive Statistics, and Section 3.1.2, Program Payments, for more information on application activity and the impacts of higher incentive rates.

As mentioned in Section 2, the program was further modified by California Senate Bill 355 (SB 355), signed October 7, 2023. SB 355 extends the program through 2032 and includes several modifications to expand program eligibility. Some of these modifications were implemented in Q1 2024 via Handbook 8. The list of modifications made via Handbook 8 can be found in Section 4.2.2.

The remainder of program changes directed in SB 355, but not included in the current handbook, such as integration of new construction and master-meter project eligibility, require further direction from the CPUC before additional modifications can be made to the program. D.24-11-006 (further outlined below) noted that specific elements of SB 355 require further consideration to determine appropriate implementation, which the CPUC continues to address in the successor proceeding, R.25-01-005. The Decision also acknowledged comments urging the CPUC to prioritize implementation of the remaining directives from SB 355. As a result, a related comment period was opened in June 2025 requesting stakeholder feedback on the remaining prioritized directives from SB 355, including possible eligibility for new construction properties and master-metered properties. The comment and reply comment periods are now closed. As of the end of this reporting period, a related Proposed Decision has not been released by the CPUC.

4.2.1 Decision 24-11-006

A Proposed Decision was released on September 30, 2024, as an outcome of the May 5, 2023, Ruling in R.14-07-002, *Administrative Law Judge's Ruling Inviting Comments on Potential Modifications to Solar on Multifamily Affordable Housing Program*. It included modifications to refine and streamline SOMAH to drive participation and improve delivery of the program's benefits, in lieu of higher solar incentives. The Final Decision, D.24-11-006, was approved and issued on November 14, 2024.

Through D.24-11-006, the CPUC has directed the SOMAH PA to include additional goals, metrics, and KPIs in future Semiannual Progress Reports and forthcoming evaluations. Examples of these additional SAPR reporting points include points of interaction, listserv subscribers with crossover to SOMAH applicants, expanded webinar statistics, and more.

The Decision also includes an emphasis on supporting and increasing participation of DAC projects, which aligns with the formal adoption of additional program goals



through D.24-11-006, requiring at least 40% of all projects statewide to be in DACs and at least 30% of all projects in each large IOU territory to be in DACs by the program's end. Decision requirements also specify that the SOMAH PA allocate 1.5% of the forecasted 2025 ME&O budget toward expenditures for ME&O efforts in Liberty and PacifiCorp territories. Based on the 2026 ME&O Plan Budget Forecast, that equates to roughly \$27,000.

The Decision also includes several directives focused on project costs and incentives:

- Integrated or paired energy storage incentives.
- Expansion of installation-related costs as eligible project costs for the program.
- Immediate suspension of the Expected Performance Based Buydown (EPBB) Calculator for future and active applications in Liberty and PacifiCorp territories, tribal applications in the PG&E territory, as well as PG&E projects located at or above one minute south of the 39th parallel.
- Progress Payment Pathway as the default with an option to opt out.
- Early payment option for tribal projects.

Additional directives focused on program design and outreach include:

- Removal of the tenant education requirement for contractors and property owners.
- High-priority properties analysis and outreach effort with the IOUs.
- Removal of the requirement for Track A projects to obtain/provide proof of three bids.
- Modified job training requirements for Liberty and PacifiCorp projects.

In addition to the directives mentioned above, the Decision also included IOU-focused directives:

- SCE, SDG&E, and PG&E must dedicate the equivalent of one full-time employee's time to completing SOMAH interconnections and providing support for SOMAH property owners and tenants in cases of VNEM billing delays.
- Each IOU will provide a confidential quarterly memo to the PA and Energy Division about VNEM billing status for SOMAH projects that have received PTO with narrative process changes or identified challenges starting January 30, 2025.
- Each IOU must also submit a Tier 1 Primary Data Collection Advice Letter providing a timeline for fulfilling data requests in support of the triennial evaluation to be completed in 2026.

As of the end of this reporting period, the SOMAH PA has completed the implementation of D.24-11-006 and is supporting the ongoing directives. Further details



on the direction for storage integration with SOMAH and the process for early payments for tribal projects were submitted to the CPUC via the Handbook Advice Letter, CSE Advice Letter 164-E, and its Supplement, CSE Advice Letter 164-E-A. The Advice Letters were approved on July 1, 2025, and effective as of May 11, 2025. The resulting Handbook 9 was published on July 30, 2025.

The SOMAH PA is confident these measures will increase participation and support for Liberty and PacifiCorp projects and offer greater support for contractors. CBO guidelines and tracking measures may shift to support current and future program needs as CBOs are encouraged to provide the bulk of the tenant education support while continuing outreach to property owners as overall programmatic capacity changes.

4.2.2 Program Handbook Records

This section reviews the SOMAH PA's work to update the SOMAH Program Handbook conducted during this reporting period, as well as relevant regulatory decisions not attached to the PA's work to update the handbook. Figure 51 provides a non-exhaustive overview of the SOMAH Program Handbook since the inaugural edition, including major updates by version.

Figure 51 – Handbook Versions

Version	Major Updates	Approval Date
Handbook 1 (original)	<ul style="list-style-type: none"> Established original program offerings and requirements 	March 2019
Handbook 2	<ul style="list-style-type: none"> SOMAH & MASH stacking 	May 2020
Handbook 3	<ul style="list-style-type: none"> Progress payments 	December 2020
Handbook 4	<ul style="list-style-type: none"> Application pipeline management (lottery) Required notification for early job trainee termination System changes affecting incentive amounts Assorted minor updates 	May 2021
Handbook 5	<ul style="list-style-type: none"> Code of conduct Application fee waiver for target groups (i.e., DACs) Formal program benchmark targeting 40% of projects in DACs by 2026 Clarification of eligibility across CalEnviroScreen versions Option to submit PPM with EECM Minimum time requirement for progress payment filing from four to two months 	May 2022
Handbook 6	<ul style="list-style-type: none"> Split Reservation Request Milestone into two phases to streamline the application process Removal of Multifamily Affordable Housing Document Cover Sheet Removal of the requirement of checklist for program participants Increased time for earmarked funding with Track A projects from three to six months Adjusted timeline from reservation approval to EECM submission from two to three months Option for SOMAH PA to perform remote site inspections at Incentive Claim 	February 2023
Handbook 7	<ul style="list-style-type: none"> Elimination of the annual incentive step-down Increased incentive levels 	June 2023

Handbook 8	<ul style="list-style-type: none"> • Extended the SOMAH Program through 2032 • Revised the Income Eligibility Pathway to require at least 66% of the property residents have incomes at or below 80% AMI • Addition of third eligibility pathway for properties owned by a California Native American tribe • Addition of fourth eligibility pathway for rental housing properties owned by a public housing authority or agency • Updated the term “building” to “property” in the definition of “Qualified multifamily affordable housing property” 	February 2024
Handbook 9	<ul style="list-style-type: none"> • Expansion of installation-related costs as eligible project costs for the program • Updates to Expected Performance Based Buydown (EPBB) Calculator: immediate suspension and pathway for future change • Integrated or paired storage incentives from SOMAH • Progress Payment Pathway as the default: remaining option to opt out • Early payments for tribal projects • Removal of tenant education requirements • Increased participation and support for Liberty and PacifiCorp projects • Directives for IOUs: each large IOU must dedicate the equivalent of one full-time employee's time to VNEM and interconnection support 	July 2025

The SOMAH PA is committed to continual improvement in program planning and development, while balancing the needs for robust stakeholder engagement in proposing updates and reducing program complexity to the maximum extent possible. With those guiding principles, the SOMAH PA works closely with stakeholders to address program gaps and ensure the program is implemented in ways that provide meaningful economic benefits to participating tenants and properties, particularly in the state's environmental justice communities.



5. Conclusions

With influential program changes like the removal of the EPBB for projects in northern parts of the state and ongoing efforts to reduce program barriers and increase participation, the SOMAH PA continues its commitment to supporting applicants and property owners toward a bright future for all SOMAH projects. The SOMAH PA also continues to expand its services to meet participant needs, as evidenced by the uptake of projects claiming incentivized integrated storage, the Progress Payment Pathway becoming the default pathway for applicants, and the extensive use of the Affordability Prescreen and Technical Assistance and Support Services. Program directives from D.24-11-006 play an important role in increasing program participation and positioning the program for continued success through increased transparency and streamlined processes. The program continues to prioritize installations for DACs and tribal communities, aiming to increase program awareness and levels of project participation among both groups. The SOMAH PA is especially focused on wider tribal engagement to remove any barriers to their participation and to increase the volume of tribal applications.

SOMAH's annual Marketing, Education, and Outreach (ME&O) Plan guides the program's overarching outreach and marketing strategies to key audiences. Outreach efforts for 2025 were shaped by D.24-11-006 and the 2023 Triennial SOMAH Evaluation Report, previous SOMAH-led primary research, and advisory groups. The 2025 ME&O Plan focused on conducting property owner outreach, increasing contractor and subcontractor diversity, updating tenant education materials, expanding job training eligibility through the HeatSpring SOMAH Academy, and collaborating with energy efficiency partners and SOMAH IOUs. The 2026 ME&O Plan will focus on connecting with and supporting property owners and contractors, with an emphasis on program updates and integrated storage.

In the second half of 2025, the SOMAH PA celebrated a continuation of strong volume with its third largest number of project completions and third highest number of progress payments. The SOMAH PA projects increasing numbers of new project entries in the first half of 2026 because of the program changes directed by D.24-11-006, such as the removal of the EPBB for northern projects, Early Payment Pathway for tribal properties, and the new paired storage incentive. The SOMAH PA anticipates impactful progress toward the program's 300 MW goal in the first half of 2026 as sunset of the ITC pushes projects to reach completion.

To ensure the program continues to deliver renewable energy and financial benefits to tenants and supports equity through a dynamic and adaptive program, the SOMAH PA



continues to engage in evaluation efforts and solicits feedback and input from CBOs, participants, stakeholders, the SOMAH Advisory Council, and other trusted advisors.

6. Appendix A

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

Upfront Technical Assistance

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

Reservation Request Milestone

- Reservation Request Submitted: Applicant has entered the required information and uploaded the reservation request documentation for review.
- Reservation Request Review: Reservation request is in queue for review by the program administrator.
- Pending QA – Reservation Request: Reservation request is under final review by the program administrator.

- Reservation Request – IOU Data Results Shared: The Reservation Request - Phase I is complete. The IOU data results have been shared and Phase II may now be started.
- Suspended – Reservation Request: Errors were found during reservation request review and require corrections by the applicant. The program administrator sent correction information via email from the PowerClerk portal.
- Suspended – Reservation Request II: Errors were found during Reservation Request Phase II Review and require corrections by the applicant. The program administrator sent correction information via email from the PowerClerk portal.
- Overdue Corrections – Reservation Request: The requested corrections for the reservation request are overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Resubmitted – Reservation Request: The reservation request has been resubmitted with corrections and is in queue for review by the program administrator.
- Pending Data Request: The application is in queue to be sent to the IOUs for electric usage data request.
- Pending IOU Data: Electric usage data has been requested from the IOU.
- Processing IOU Data: Electric usage data has been received and is under review by the program administrator.
- Pending Application Deposit: Reservation request is free of errors and pending receipt of the application deposit before moving to reservation approved status.
- Overdue – Application Deposit: The application deposit is overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Reservation Approved: Reservation request requirements have been met and the application deposit has been received. The project's funding will be reserved for 18 months, starting from the reservation approval date.

Energy Efficiency Compliance Milestone

- Overdue – Energy Efficiency Compliance Milestone: The Energy Efficiency Compliance Milestone is overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Energy Efficiency Compliance Milestone Submitted: Applicant has entered the required information and uploaded the Energy Efficiency Compliance Milestone documentation for review.
- Energy Efficiency Compliance Milestone Review: Energy Efficiency Compliance Milestone is in queue for review by the program administrator.

- Pending QA – Energy Efficiency Compliance Milestone: The Energy Efficiency Compliance Milestone has been reviewed by the program administrator and is pending quality assurance check.
- Suspended – Energy Efficiency Compliance Milestone: Errors were found during Energy Efficiency Compliance Milestone Review and require corrections by the applicant. The program administrator sent correction information via email from PowerClerk.
- Overdue Corrections – Energy Efficiency Compliance Milestone: The requested corrections for the Energy Efficiency Compliance Milestone are overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Resubmitted – Energy Efficiency Compliance Milestone: The Energy Efficiency Compliance Milestone has been resubmitted with corrections and is in queue for review by the program administrator.
- Energy Efficiency Compliance Milestone Approved: Energy Efficiency Compliance Milestone requirements have been met.
- Pending Site Verification: Program administrator is completing a Site Verification. The application is held in this status until results are received and processed.
- Energy Efficiency Compliance Milestone Postponement Approved: The Energy Efficiency Compliance Milestone Postponement has been approved. The energy efficiency requirements must be submitted with the Proof of Project Milestone or Incentive Claim Milestone.

Proof of Project Milestone

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



- Resubmitted – Proof of Project Milestone: The Proof of Project Milestone has been resubmitted with corrections and is in queue for review by the program administrator.
- Proof of Project Milestone Approved: Proof of Project Milestone requirements have been met.

Progress Payment Pathway

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

Incentive Claim Milestone

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

Waitlist

- **Waitlist:** Applicant has entered the required information and uploaded the Technical Assistance Request Form or reservation request documentation for program administrator review in a fully subscribed program.
- **Waitlist: Upfront Technical Assistance Review:** The Upfront Technical Assistance Request is in queue for review by the program administrator in a fully subscribed program.

- Waitlist: Pending QA – Upfront Technical Assistance Request: The Upfront Technical Assistance Request has been reviewed by the program administrator and is pending quality assurance check.
- Waitlist: Suspended – Upfront Technical Assistance Request: Waitlisted Upfront Technical Assistance Request is incomplete or requires further action by the applicant. The program administrator sent correction information via email from the PowerClerk portal.
- Waitlist: Overdue – Technical Assistance Request Follow-up: The requested corrections for the Upfront Technical Assistance Request are overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Waitlist: Resubmitted – Upfront Technical Assistance Request: The Upfront Technical Assistance Request has been resubmitted with corrections and is in queue for review by the program administrator in a fully subscribed program.
- Waitlist: Pending Data Request: The Upfront Technical Assistance Request has been reviewed by the program administrator and is in queue to be submitted to the IOU for historical electric usage data at the project site.
- Waitlist: Pending IOU Data: Electric usage data has been requested from the IOU and is pending review by the program administrator in a fully subscribed program.
- Waitlist: Processing IOU Data: The program administrator has received historical electric usage data for the project site from the IOUs and is processing the data.
- Waitlist: Upfront Technical Assistance Request Approved: Program administrator has reviewed and approved the Technical Assistance Request in a fully subscribed program. The project may now submit a Reservation Request Package.

Other statuses

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