



Solar on Multifamily  
Affordable Housing

SOMAH

# Semiannual Progress Report

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Reporting Period  
January 1, 2025 – June 30, 2025



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# 1. Executive Summary

Covering the first half of 2025, this 12th 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 120 total application submissions in the first half of 2025, along with continued popularity of the Progress Payment Pathway, steady use of the Affordability Prescreen service, progress on system performance monitoring and impactful regulatory activity for program improvements. Marketing efforts continue to target outreach efforts to best suit program applicants and participants to achieve SOMAH's environmental justice goals.

New applications received in Q1-Q2 2025 that remained active through the end of Q2 added 15.9 MW capacity toward the program's 300 MW goal. Twenty-one of these applications were prescreen conversions to application submittal and eight were Track A applications. During this reporting period, the Affordability Prescreen service helped 10 potential projects eliminate extra administrative burden by deeming them ineligible prior to a formal application submission. The year started strong with Q1 2025 seeing 63 total new applications submitted compared to 10 total new applications submitted in Q1 2024. Additional funding was released for Pacific Gas and Electric Company (PG&E), San Diego Gas & Electric Company (SDG&E), Southern California Edison (SCE) and PacifiCorp Utilities Company — and the program maintained plentiful funding for all investor-owned utility (IOU) territories with immediate application review and no waitlists. The expected early 2024 spike of completed projects shifted to a high project close-out volume through the first half of 2025 due to extension requests because of industry impacts that perpetuated delays in construction timelines and project completion. The significant wave of project completions will continue through the second half of this year, as 68 inspections were completed in the first half of 2025.

The SOMAH Program Administrator (PA) continues to emphasize understanding and adapting to participant needs and challenges while striving to implement a resilient and successful program. During this reporting period, the SOMAH PA worked toward implementing program changes directed in California Public Utilities Commission (CPUC) Decision (D.)24-11-006.

During the first half of 2025, on-site conferences and tenant education workshops showcased SOMAH-funded systems and promoted their benefits to tenants, property owners and communities. This included in-person attendance at the Southern California Association for Non-Profit Housing (SCANPH) Annual Conference, the Non-Profit Housing



Association of Northern California's Affordable Housing Conference, San Joaquin Valley Housing Summit and Bisnow Multifamily Annual Conference – West.

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 to highlight the program's community and workforce benefits to property owners, tenants, local stakeholders and other decision-makers. Starting in Q1 2025 and through the rest of the year, CBOs are prioritizing tenant education support and property owner outreach within service regions.

## 1.1 COVID-19 Pandemic Acknowledgement

The current project queue demonstrates commitment to the program as the completed projects from this reporting period made meaningful efforts to adapt and evolve in the post-pandemic environment. Despite these impacts, the program has continued to see projects progress with their design, construction and interconnection efforts with the second most completed projects in a 6-month period since program launch occurring during this reporting period, only 17 projects less than the Q3-Q4 2024 record. The SOMAH PA remains committed to prioritizing health and safety, while working to advance the goals of the SOMAH Program and help build a resilient California.

## 2. Background

The Solar on Multifamily Affordable Housing (SOMAH) Program provides financial incentives for installing photovoltaic (PV) energy systems on multifamily affordable housing. The program is designed to deliver clean power and credits on energy bills to hundreds of thousands of California's affordable housing residents. The program was created 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. The program was further modified by the recent SB 355, signed October 7, 2023. SB 355





extends the program through 2032 and includes 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 May 11, 2025) 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 benefit. 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, Center for Sustainable Energy® and GRID Alternatives, in collaboration with the California Housing Partnership and rotating CBOs. The SOMAH Program is overseen by the California Public Utilities Commission (CPUC).

## 2.1 Application Pathways: Track A and Track B

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





Performance Based Buydown (EPBB)<sup>1</sup> methodology. Track A is designed to provide Upfront Technical Assistance (TA) and Support Services for property owners who need assistance understanding if solar is right for their property. 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. For participants in Track A who have not identified a solar contractor, they are guided through a bid solicitation process to select an eligible solar contractor for their project.<sup>2</sup>

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.

<sup>1</sup> 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, PacifiCorp and tribal applications in the PG&E territory as well as PG&E projects located at or above one minute south of the 39th parallel.

<sup>2</sup> Per D.24-11-006, the multiple bid requirement for Track A projects will be removed in a forthcoming handbook change in 2025.



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



## 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.<sup>3</sup> 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 PUC 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.

<sup>3</sup> Effective with Handbook 8 in February 2024, properties can 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 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 Semi-annual 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).

### 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 June 30, 2025.

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

Category	
SOMAH Program Administration	\$25,608,418
SOMAH Marketing, Education & Outreach (ME&O)	\$16,683,268
SOMAH Workforce Development	\$2,768,306
SOMAH Technical Assistance	\$2,478,690
SOMAH Evaluation Expenses <sup>4</sup>	\$960,878
Investor-Owned Utility (IOU) Expenses	\$6,977,789
Total	\$55,477,348

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

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

<sup>5</sup> Detailed expenditure information may be accessed by opening the SOMAH Semi-annual Expense Report here: <https://www.californiadgstats.ca.gov/programs/>.



### 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.<sup>6</sup> 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 PacifiCorp funding are released quarterly versus the annual lump sum release for other territories.

The following utility territories released funding during the first half of 2025: PG&E (June 2025), SDG&E (March 2025), SCE (March 2025) and PacifiCorp Utilities (April 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.

<sup>6</sup> Program incentive budget information for each IOU territory:  
[https://www.californiadgstats.ca.gov/programs/somah\\_budget/](https://www.californiadgstats.ca.gov/programs/somah_budget/).



**Figure 3 – Project Capacity and Budget**

		Waitlist		Earmarked		Pending Reservation		Reserved		Completed		Application Totals		Total Budget (\$)	Remaining Budget (\$)
		Capacity	Budget	Capacity	Budget	Capacity	Budget	Capacity	Budget	Capacity	Budget	Capacity	Budget		
		(MW)	(\$)	(MW)	(\$)	(MW)	(\$)	(MW)	(\$)	(MW)	(\$)	(MW)	(\$)		
PG&E	Track A	0	0	2.301	6,176,189	0	0	0.481	1,351,246	0.051	72,177	2.833	7,599,612	292,982,209	165,293,424
	Track B	0	0	0.476	1,523,784	4.095	10,336,717	32.603	64,016,230	22.187	44,212,442	59.361	120,089,173		
	Total	0	0	2.777	7,699,973	4.095	10,336,717	33.084	65,367,476	22.238	44,284,619	62.194	127,688,785		
SCE	Track A	0	0	0.271	866,647	0	0	0.140	188,509	0.351	1,079,669	0.762	2,134,825	382,971,842	305,852,462
	Track B	0	0	0	0	4.150	9,355,957	17.834	37,665,399	14.145	27,963,199	36.129	74,984,555		
	Total	0	0	0.271	866,647	4.150	9,355,957	17.974	37,853,908	14.496	29,042,868	36.891	77,119,380		
SDG&E	Track A	0	0	0.138	443,089	0	0	0	0	0	0	0.138	443,089	98,387,648	71,224,242
	Track B	0	0	0	0	0.430	1,034,513	7.844	15,100,835	5.208	10,584,969	13.482	26,720,317		
	Total	0	0	0.138	443,089	0.430	1,034,513	7.844	15,100,835	5.208	10,584,969	13.620	27,163,406		
PacifiCorp	Track A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0	0	10,939,248	10,939,248
	Track B	0	0	0	0	0	0	0	0	0	0	0	0		
	Total	0	0	0	0	0	0	0	0	0	0	0	0		
Liberty Utilities	Track A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0	0	2,452,225	2,332,055
	Track B	0	0	0	0	0	0	0.055	120,170	0	0	0.055	120,170		
	Total	0	0	0	0	0	0	0.055	120,170	0	0	0.055	120,170		
TOTAL	Track A	0	0	2.710	7,485,925	0	0	0.621	1,539,755	0.402	1,151,846	3.733	10,177,526	787,733,172	555,641,431
	Track B	0	0	0.476	1,523,784	8.675	20,727,187	58.336	116,902,634	41.540	82,760,610	109.027	221,914,215		
	Total	0	0	3.186	9,009,709	8.675	20,727,187	58.957	118,442,389	41.942	83,912,456	112.760	232,091,741		



**Figure 4 – Cumulative Program Budget**

	2016 Budget (\$)	2017 Budget (\$)	2018 Budget (\$)	2019 Budget (\$)	Under- Collections True-up (\$)	2020 Budget (\$)	2021 Budget (\$)	2022 Budget <sup>7</sup> (\$)	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	13,272,910	127,688,785	292,982,209	171,885,795
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	77,119,380	382,971,842	273,598,955
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	27,163,406	98,387,648	63,642,497
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	342,422	0	10,939,428	10,219,582
Liberty Utilities	132,440	258,329	314,706	419,517	0	326,327	300,128	401,608	299,170	TBD	TBD	120,170	2,452,225	2,332,055
<b>TOTAL</b>	<b>5,029,126</b>	<b>10,114,780</b>	<b>91,324,218</b>	<b>75,218,897</b>	<b>88,506,960</b>	<b>67,108,174</b>	<b>97,239,554</b>	<b>128,067,452</b>	<b>97,600,177</b>	<b>56,452,830</b>	<b>71,071,004</b>	<b>232,091,741</b>	<b>787,733,172</b>	<b>555,641,431</b>

<sup>7</sup> 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 the publication of program statistics through the SOMAH Incentive Budget Report and SOMAH Working Data Set on the California Distributed Generation Statistics [website](#). The first iteration of the Semi-annual 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 \$555.64 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 cancelled by the SOMAH PA due to missed deadlines or failure to meet program eligibility requirements or voluntarily withdrawn by the applicant or host customer. Second, incentive funds may become available through the course of application review. For example, an applicant's adjustments to the system size after receiving consumption data from the IOU typically affect the reserved incentive amount. The SOMAH PA has observed that nearly all projects will adjust their system size after receiving site consumption data during the Reservation Request Milestone (or during Upfront 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 Q1 and Q2 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	Cancelled/ Withdrawn	Total
PG&E	267	205	230	702
SCE	127	84	103	314
SDG&E	61	37	59	157
Liberty Utilities	1	0	1	2
PacifiCorp	0	0	1	1
<b>Total</b>	<b>456</b>	<b>326</b>	<b>394</b>	<b>1176</b>

N = 1,176

Of the 120 total applications submitted between January and June 2025, 116 remain active at the close of the reporting period, an increase of 15.85% over the July through December 2024 reporting period during which 118 of the 146 applications submitted during that time remain active. Application submissions throughout the reporting period were steady with large spikes in January (26 submissions) and April (31 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 116 active submitted applications from January through June 2025, 60 new applications were submitted in Q1 and 56 were submitted in Q2. Eight of the new applications were Track A projects, all were submitted in the larger IOU territories (PG&E, SCE and SDG&E), 11 were previously cancelled reentry applications and 21 participated in the Affordability Prescreen service. 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 in the prescreen service. The prescreen service provides property owners who are unfamiliar with SOMAH the ability to submit applications with confidence with the confirmation of eligibility for the program, an introduction to PowerClerk and the SOMAH PA, and the generation of an application number making for a smooth transition into the application process. No new applications were submitted 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 2025 and beyond. The active application in Liberty Utilities territory has reached its Proof of Project Milestone. The previously active application in PacifiCorp territory was cancelled during the previous reporting period, with plans to re-enter the program in the future after resolving extenuating circumstances with site conditions and project planning. The SOMAH PA has been working on marketing and outreach coordination with both Liberty Utilities and PacifiCorp to increase program participation in these small multi-jurisdictional utility territories. The PA has discussed program barriers and disadvantages in the northern multi-jurisdictional utilities and, to address these issues, in Q3 the SOMAH PA developed Technical Assistance Preview Reports 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 completed the first round of property owner outreach directed at the owners of the identified potentially eligible properties in both the PacifiCorp and Liberty territories. The PA contacted each property owner individually 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 the EPBB calculator removal for projects located in these two territories. The total numbers of new applications (including both active and cancelled applications) submitted in the previous reporting periods are as follows:

- 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

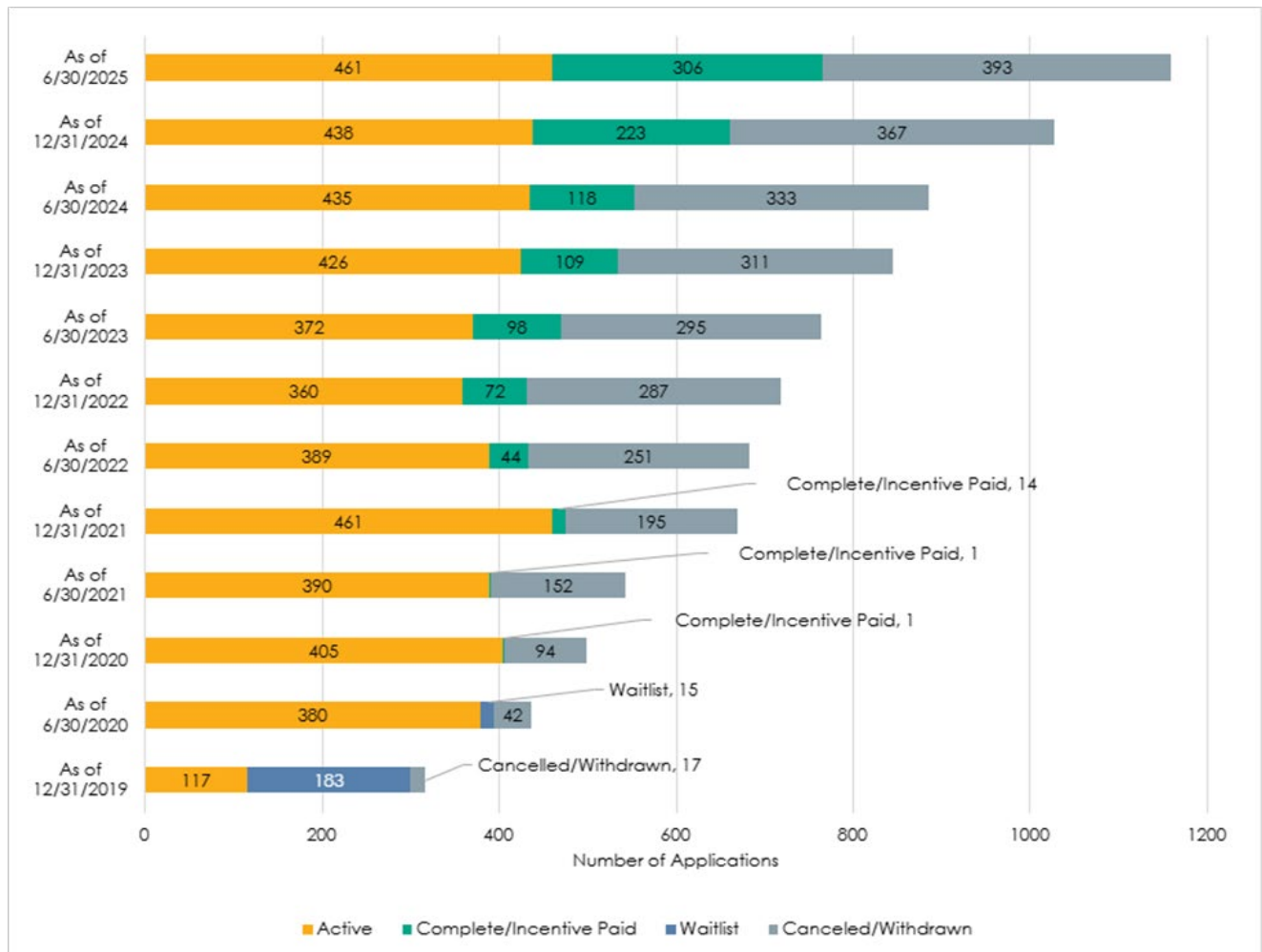


- July–December 2020: 63 new applications
- January–June 2020: 120 new applications
- July 2019–December 2019: 317 new applications

Total new application volume in the first half of 2025 nearly doubled the number of applications submitted during the first half of 2024 (63) with 120 applications submitted. To date, 2025 application volume (120 new applications) is up 144.9% from the application slowdown in 2022 (49) and trending positively to surpass the application volume of 2024 (210), already passing the halfway mark at the time of this report. Application spikes (greater than 100) occurred before the historic July 2020 and October 2021 incentive step-downs. These spikes correlated with applicants seeking the higher incentive rate before incentive levels decreased. Historically, the program was required to step down incentive rates annually on July 1 of each year. In 2021, the July 1 incentive step-down was postponed due to a pending National Renewable Energy Laboratory (NREL) report used for the incentive step-down analysis. The CPUC approved the SOMAH PA's 120-day extension request, which provided the PA time to complete the analysis and stakeholder outreach prior to the Step 3 incentive rate deployed on October 30, 2021. The absence of an application submittal spike in 2022 aligns with the deferred incentive step-down resulting from the PA's Petition for Modification of the incentive structure. The SOMAH PA was granted an extension to pause the incentive step-down until a Decision on the Petition for Modification was issued by the CPUC. As a result of the extension of the incentive step-down for 2022, the previous pattern of increased application submissions prior to July 1 did not recur in 2022. Per CPUC D.23-03-007, the annual incentive step-down has been removed from the program. See Section 4.2, Program Design and Updates for more information on these program changes. With the removal of the incentive step-down via Handbook 7 in 2023, applicants can better align the timing of the project and the program application. The program no longer sees application spikes greater than 100 in a month and instead sees a more even spread of application submittals throughout the year, with the 2024–25 monthly peaks being 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 builds 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 integrates 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. Relevant data is automatically copied into the new SOMAH application in the appropriate utility territory once the prescreen request is deemed eligible, reducing the applicant's required data entry.

Since implementing the Affordability Prescreen service at the end of 2022, 41% of the Affordability Prescreen service entries have become active SOMAH applications and only 26 applications that have participated in the service have cancelled. The cancellations were due to ineligibilities stated in the initial prescreen review or the property was found to be master metered. Prescreen data is tracked to record project conversion rates into active application submissions and/or prescreened projects where eligibility was confirmed that may need further marketing, education and outreach efforts. Common reasons for ineligibility of documents submitted to the Affordability Prescreen Service have included deed restrictions being expired or having less than 10 years remaining in their compliance period, and lack of information within the document to locate the property. AMI restrictions are rarely referenced for ineligibility due to the Handbook 8 update expanding affordability requirements<sup>8</sup> 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:

- 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

<sup>8</sup> Effective February 15, 2024, Handbook 8 expands the income-qualifying affordability requirement from 80% of property residents having incomes at or below 60% of the Area Median Income (AMI) to 66% of property residents having incomes at or below 80% of the AMI.



- 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

Since the rollout of the formalized prescreen offering, application cancellation reasons have excluded regulatory documentation ineligibility. This process has successfully lessened administrative burdens for both the applicant and SOMAH PA by identifying ineligible projects before they enter the pipeline and require a higher level of administrative effort to manage. Since its launch, the Affordability Prescreen service has identified 88 ineligible regulatory documents prior to application submittal, which was historically the highest reason for cancellation prior to Reservation Approval. This reporting period also recorded a decrease in the number of prescreens deemed “eligible with income affidavit.” This decrease in prescreens that require an income affidavit to be considered eligible is a direct benefit of the AMI eligibility updates implemented through Handbook 8. The expanded eligibility requirements have lessened applicants’ reliance on additional documentation being required for program eligibility, further increasing efficiencies and reducing administrative burden for all parties.

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 cancelled 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” cancelled 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 11 previously cancelled applications re-entering the program in the first half of 2025.

The SOMAH PA maintains consistent communication with SOMAH contractors who have active applications to understand their project timelines and any potential barriers. This interface with contractors and program participants also helps to 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 to the Incentive Claim Package deadline remained relatively constant. Q1 2025 had 84 extension requests





received while Q2 had 73 extension requests. The following are the numbers of Incentive Claim Package deadline extensions submitted in the previous reporting periods:

- 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

The new extension requests refer to each individual extension request submitted, and applications may have more than one extension request throughout the application process. Each extension request is reviewed and addressed on a case-by-case basis. From start to date, the program's average length of an Incentive Claim Package deadline extension request is 174 days. The maximum term per extension request is 180 days. Like previous reporting periods, most extension requests cite one of two reasons: changes to the original design layout or funding of the project and 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 across the SCE, SDG&E and PGE territories, as well as unforeseen engineering challenges. Despite these extensions, the program completed and paid out 85 projects from January through June 2025 with a significant group slated for completion for the remainder of 2025.

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 or actual construction start date. This information helps identify where the project is in the life cycle of installation at the time of the SOMAH application. While the construction and interconnection processes are bifurcated from the SOMAH incentive application, the timing of installation and interconnection directly relate to the project's ability to submit for the incentive claim and progress payment (optional). 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 now required to provide the mechanical completion date of a project, which will indicate construction completion. Tracking mechanical completion dates will support the





SOMAH PA in understanding the time it takes for a system to receive permission to operate (PTO). While there is currently not enough data to report on the average between mechanical completion and PTO dates, the PA has initiated tracking, and this data will be included in a future SAPR. 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. The additional construction start date validation provided via the Extension Request Form improves the accuracy of the PA's project completion estimates provided in Table 13 of the Semi-annual Expense Report (SAER).

Actual construction start timelines will continue to be updated as data is collected at different milestones in the application process. Throughout Q1-Q2 2025, 157 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 later extension requests (most recently submitted) 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 Q1-Q2 2025 (six) remain steady each quarter with an even split of three projects beginning construction in Q1 2025 and three projects beginning construction in Q2 2025, whereas Q3-Q4 2024 (14) had a significantly larger lead in Q3 with 13 projects beginning construction and only one project beginning construction in Q4 2024. Construction timeline projections continued to shift through Q1-Q2 2025 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 second half of 2025.

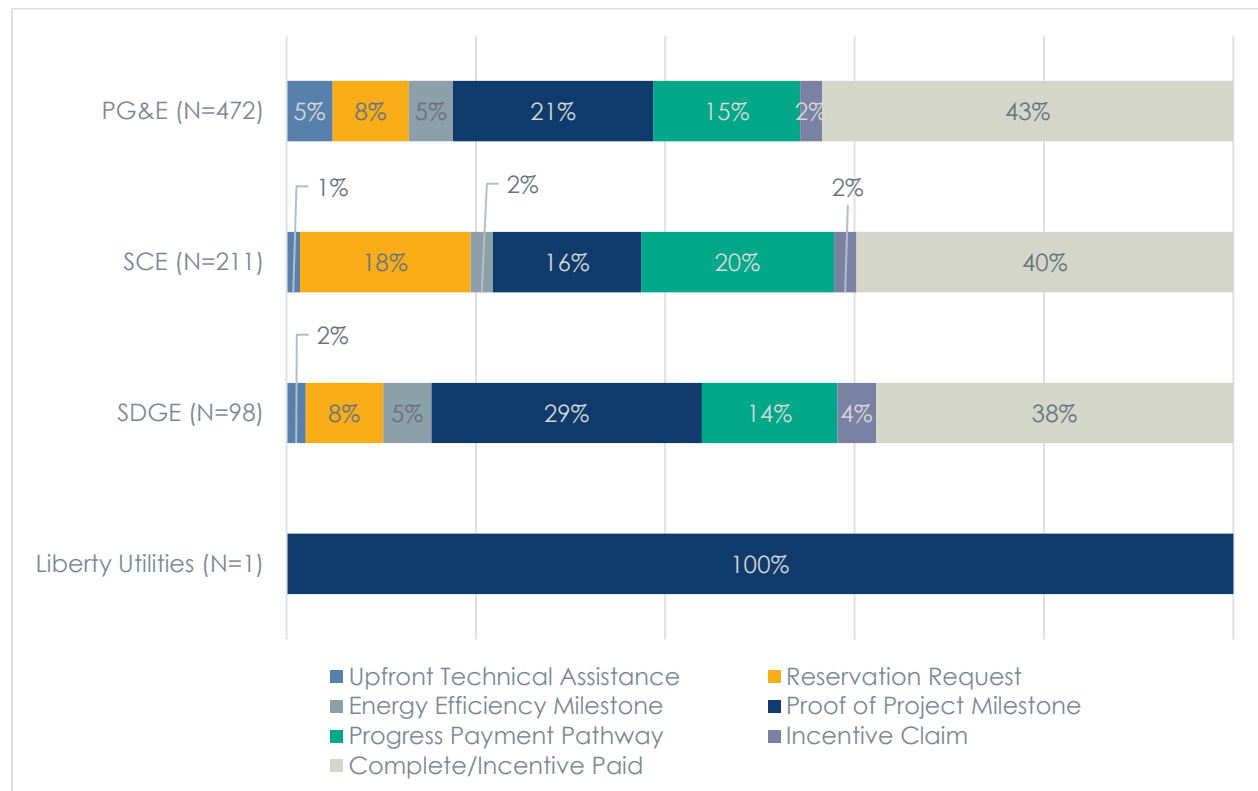
Effective January 2024, the SOMAH PA implemented process improvements to increase the efficiency of the extension request process. Extension requests are now submitted directly via the PowerClerk application portal, simplifying the process for applicants and making it easier for the SOMAH PA to track and report on extension request data.

**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	23	38	22	100	73	11	205
SCE	3	38	5	33	43	5	84
SDG&E	2	8	5	28	14	4	37
Liberty Utilities	0	0	0	1	0	0	0
PacifiCorp	0	0	0	0	0	0	0
<b>Total</b>	<b>28</b>	<b>84</b>	<b>32</b>	<b>162</b>	<b>130</b>	<b>20</b>	<b>326</b>

N = 782

**Figure 8 – Percentage of Active Applications by Milestone and Territory<sup>9</sup>**



N = 782

<sup>9</sup> PacifiCorp is not represented in Figure 8 because no projects are active in this territory at the time of reporting.



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 historical total count of progress payments issued to date nearly doubled in this reporting period. 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 prior to submitting their Incentive Claim Package. These positive trends show project closeout is likely to increase in the next reporting period.

In Q1-Q2 2025, eight new Track A applications were submitted. Prior to submitting Track A applications, six of the applications utilized the prescreen service. Additionally, two of the applications were submitted from a repeat property owner who enrolled one property in Track A in 2023. Of the eight Track A applications working with the SOMAH PA to submit the documentation required for the Upfront Technical Assistance stage in PowerClerk, five are approved, two are suspended and one is in data request. 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	Cancelled/ Withdrawn	Total
Track A	33	3	51	87
Track B	423	323	343	1089

N = 1,176

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.

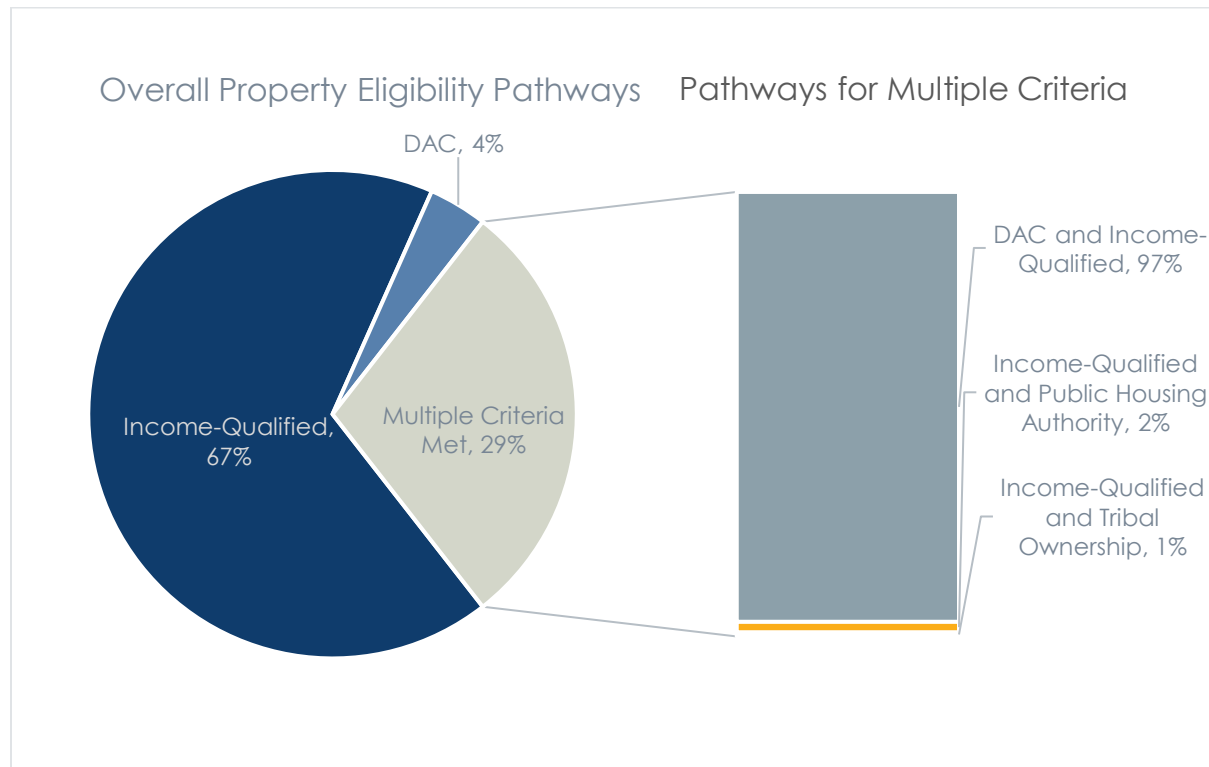
Projects must satisfy at least one of the following four options:

- 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.<sup>10</sup>
- Public Housing Authority: The property is rental housing property that is owned by a public housing authority or public housing agency.<sup>11</sup>

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**

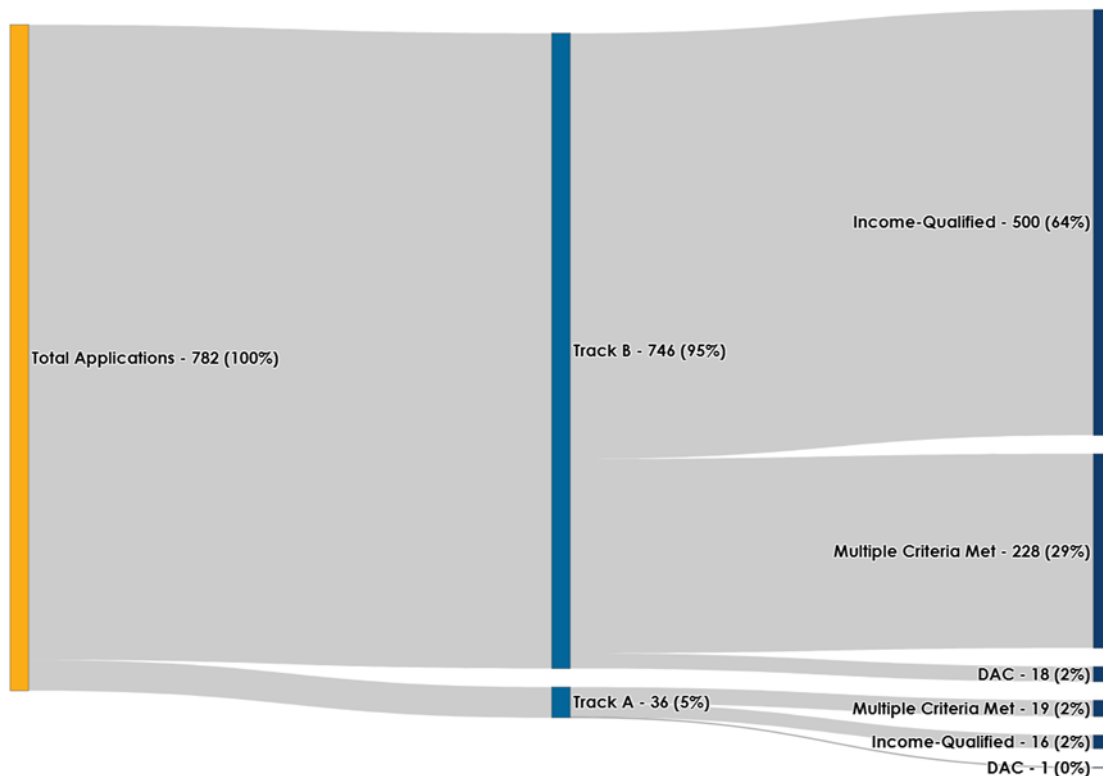


<sup>10</sup> As defined in Section 21073 of the Public Resources Code, “tribe” is defined as a California Native American tribe. “California Native American tribe” means a Native American tribe located in California that is on the contact list maintained by the Native American Heritage Commission for 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.

<sup>11</sup> 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.

Of the 782 active applications<sup>12</sup> received, approximately 67% qualified through only the income pathway, approximately 4% qualified through just the DAC pathway and approximately 29% qualified for the program through multiple criteria met. In 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 rose slightly from 31% to 32.6%, rising slightly higher than previous ranges for this statistic.

**Figure 11 – Property Eligibility by Incentive Track<sup>13</sup>**



<sup>12</sup> Active applications are those that have not been cancelled or withdrawn. This figure includes applications pending reservation approval that have not yet had their project information fully finalized.

<sup>13</sup> Calculations used for this visual are subject to rounding and total percentages may not equal 100%.



Figures 12 and 13 further break down the property eligibility statuses by count and percentage to highlight the number of DAC and Tribal Ownership-qualifying properties.<sup>14</sup> 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 eligibility for otherwise eligible properties within both the current and immediately previous version of the CalEnviroScreen and the inclusion of federally recognized tribal lands as part of the CalEnviroScreen DAC designation. Both updates support 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. However, three projects that were previously qualified are tribal-owned and remain eligible based on the newly defined tribal pathway. Based on eligible property data reviewed by the SOMAH PA, these eligible properties that are owned by a tribe or public housing authority would 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.”

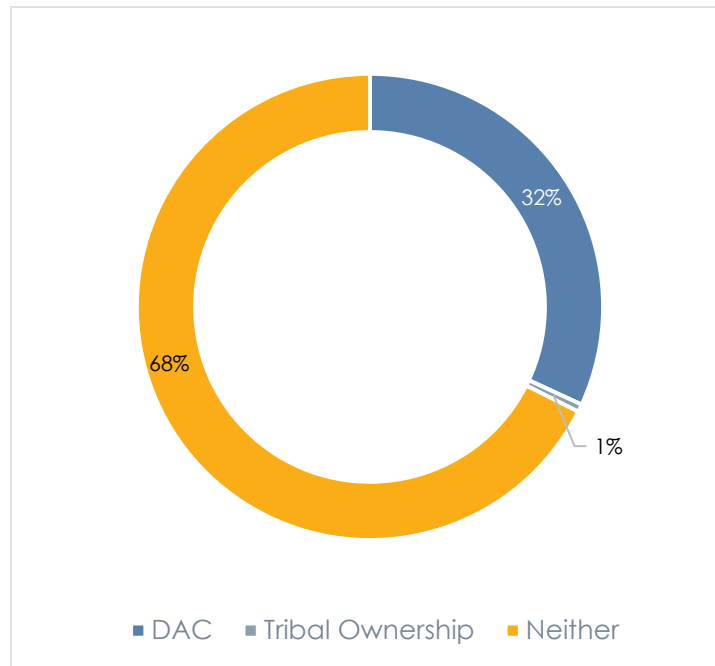
**Figure 12 – Property Eligibility by Reservation Status since Program Start**

Property Eligibility	Pending Reservation Approval	Reservation Approval Received	Complete/ Incentive Paid	Cancelled/ Withdrawn
Multiple Criteria Met	41	115	91	95
DAC	1	9	9	26
Income-Qualified	44	246	226	272
Tribal Ownership	0	0	0	0
Public Housing Authority	0	0	0	0
Data not reported	0	0	0	1

N = 1,176

<sup>14</sup> DACs are not distributed evenly across the IOU territories. The percentage of census tracts that are DACs in each IOU territory varies, along with the overlap of eligible properties in a DAC by each IOU territory. The SOMAH PA does not know of any properties located in DACs in Liberty Utilities or PacifiCorp territories.

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



N = 1,176

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 Reservation Request Milestone. The three main components of the Reservation Request Milestone 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 groups<sup>15</sup>) before issuing a reservation approval. This approval is an important achievement for projects and for programmatic data and milestone tracking.

At the close of Q2 2025, there were 85 applications yet to receive reservation approval. Track A applications that have not yet submitted a reservation request account for 25

<sup>15</sup> 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.





of the 85 applications. The remaining 60 applications are in the Reservation Request Milestone and of those, 26 applications are currently in Processing Data Request, Data Results Shared or Pending Application Deposit status before receiving final reservation approval. The remaining 34 applications are in Reservation Request Submitted, Pending QA, Suspended or Review status. Most of the program's applications have passed the Reservation Request Milestone; 371 applications have received reservation approval and 326 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. Previously named the Energy Savings Assistance Program (ESA), the Multifamily Energy Savings Program was launched to provide in-unit and whole-building upgrades for low-income residents. The Multifamily Energy Savings Program 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 monthly and annually. Projects that have reached reservation approval status are shared monthly, along with a rolling list 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" ESA, and its newest expansion, Multifamily Energy Savings Program leads that will hopefully become active ESA 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 Multifamily Energy Savings Program launched on July 1, 2023. The SOMAH PA will report on successfully enrolled Multifamily Energy Savings 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 will capture Multifamily Energy Savings Program efforts for SOMAH projects. The SOMAH PA collected reportable feedback for the 2024 annual ESA referral data request in Q1 2025. Results and summaries of the available information on completed projects can be seen below. The SOMAH PA will continue to collect and report on ESA data on completed projects on an annual basis during the first quarter.

## 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.

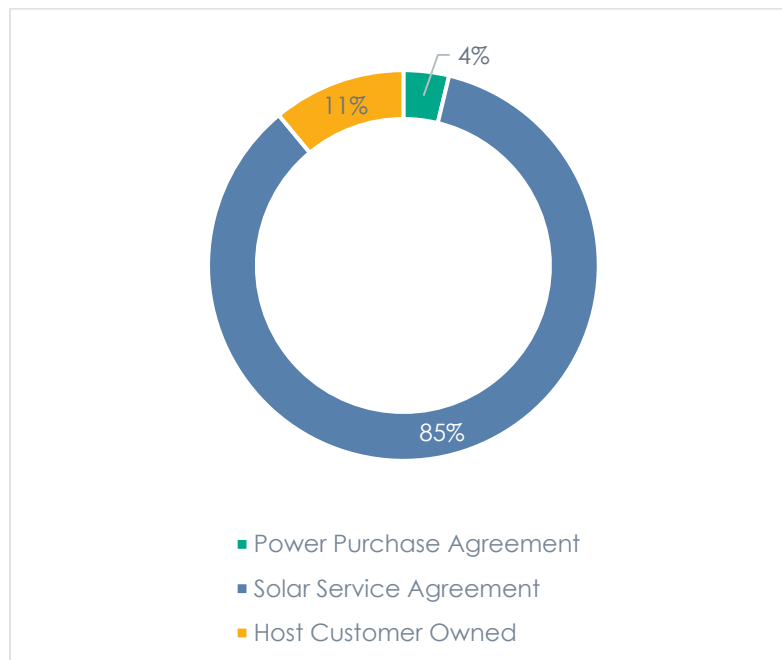
## SCE

- 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, microwave and shower head replacements, water education, in-home energy education and assessment.

**Figure 14 – System Ownership Type**

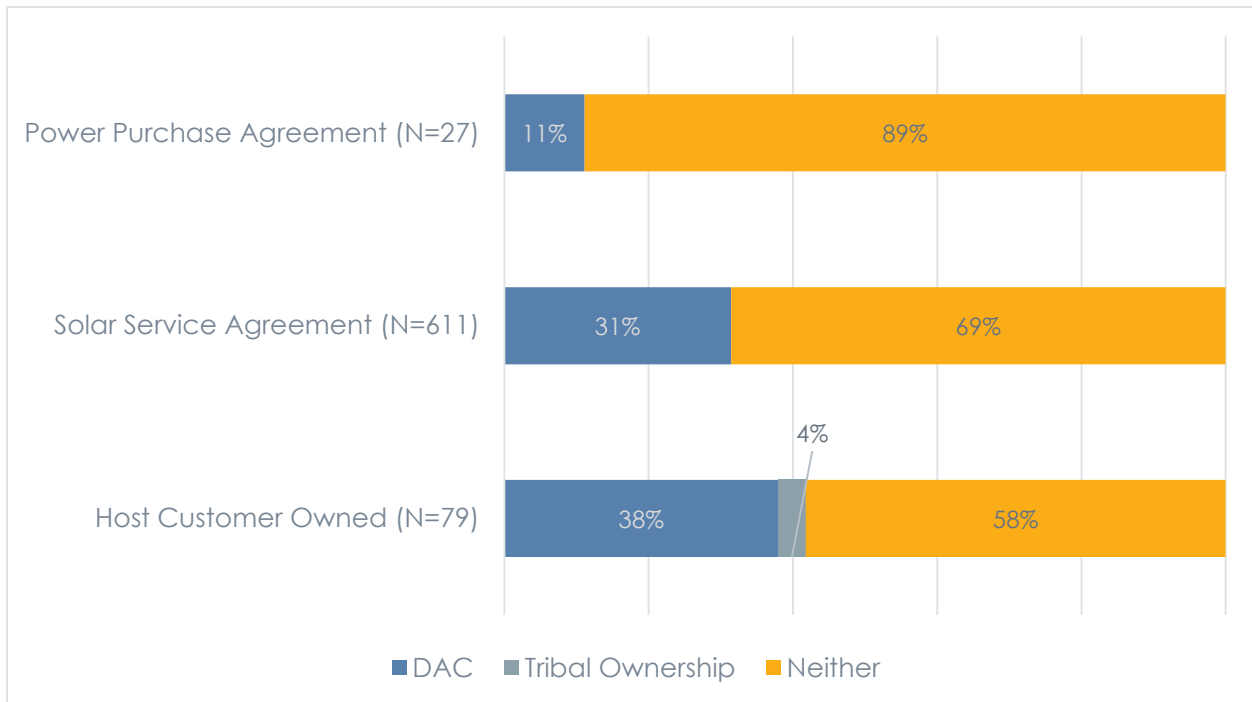


N = 717



As Figure 14 shows, most SOMAH projects, 85%, 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, 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 is a likely influence on 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**

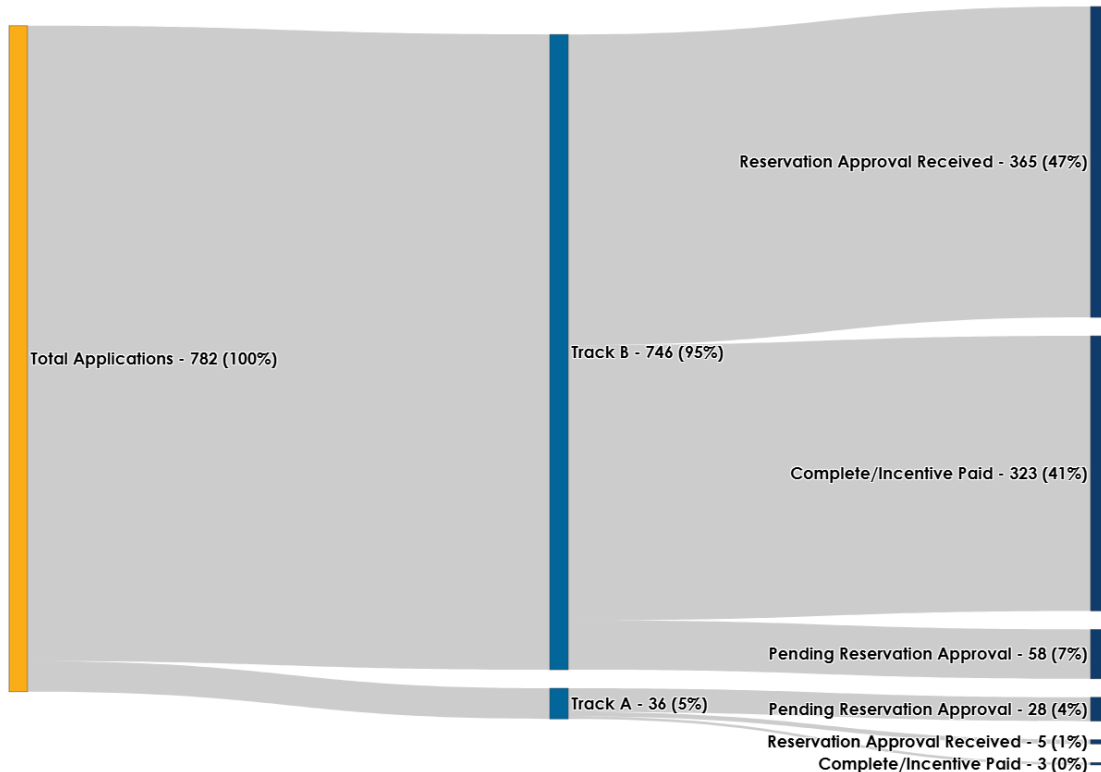


N = 717

Figure 15 further segments system ownership types by DAC, Tribal Ownership or neither DAC nor Tribal Ownership properties. It illustrates that 38% of host-customer owned systems are reported to be installed in DACs and another 4% at tribal-owned properties.

In comparison, 31% of solar installations in DACs have entered an SSA. The data shows that DAC and tribal-owned properties are more likely to purchase their solar systems than enter into an SSA or PPA.

**Figure 16 – Application Reservation Status by Incentive Track<sup>16</sup>**



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

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

- Pathway 1 – Energy efficiency whole-building walk-through audit.

<sup>16</sup> Calculations used for this visual are subject to rounding and total percentage may not equal 100%.



- Pathway 2 – One of the following:
  - 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.

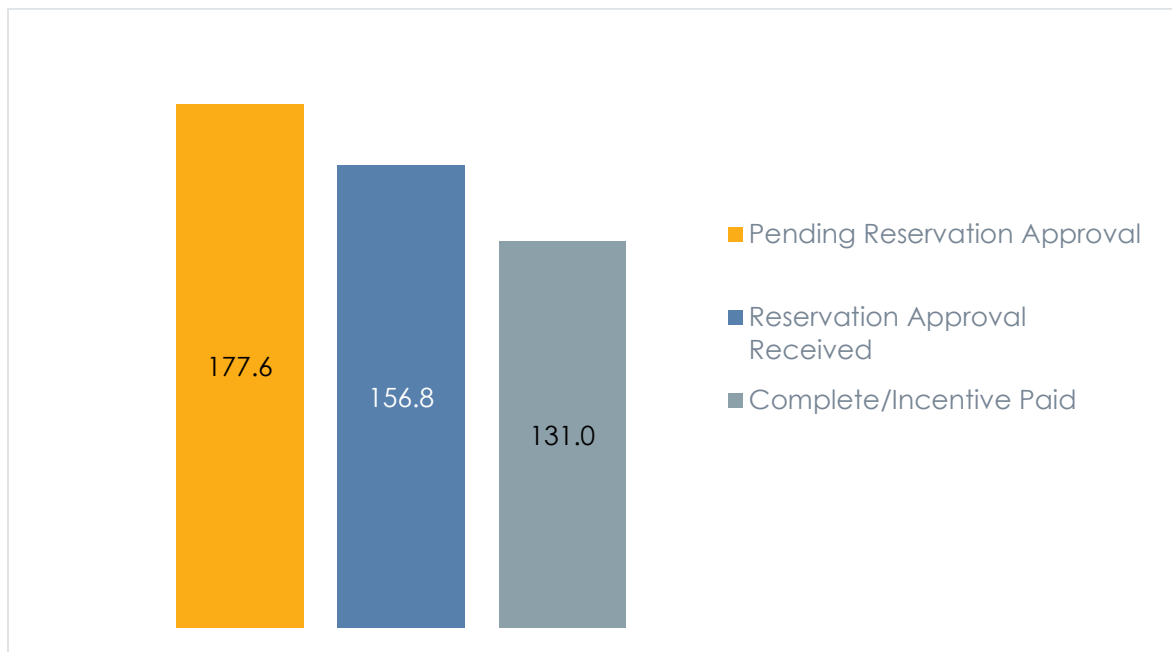
To accommodate COVID-19 challenges with completing Pathway 1, whole-building walk-through audit, the SOMAH PA introduced the EECM Postponement option in early July 2020 as a temporary program response, allowing projects that received reservation approval to postpone submitting their EECM documentation up to submission of the Incentive Claim Milestone. At the Q2 2021 Public Forum, the SOMAH PA announced an end to the EECM Postponement option effective September 13, 2021, and continued to honor projects that were approved for postponement with no impacts to those project timelines. As projects continue to progress toward project completion, the postponed EECM documentation is submitted to and reconciled by the SOMAH PA. In the first half of 2025, the applications that participated in EECM postponement continued to advance toward project completion by fulfilling the EECM requirement during the Incentive Claim process. Of the 277 applications that have participated in EECM postponement only 21 are left that have yet to fulfill these requirements. The SOMAH PA anticipates the remaining applications with EECM postponement will be submitted and reach the Incentive Claim Milestone by the end of 2025.

Completing application milestones is a critical step in the application process and important for collecting valuable program data. In this reporting period, the program has applications in all stages of application, construction and completion processes representing each of the program's four application milestones (plus the fifth optional milestone, Progress Payment Pathway<sup>17</sup>). The Reservation Request and Energy Efficiency Compliance Milestones are important steps in determining project eligibility and the eligible system size, as they consider consumption history and available energy efficiency upgrades. Proof of Project 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.

<sup>17</sup> Per D.24-11-006, the Progress Payment Pathway will become default with an option to opt out. This change will be implemented through a forthcoming handbook change in 2025.

At the close of Q2 2025, 20 projects are currently working through the Incentive Claim Milestone. Of those Incentive Claim projects, nine are in the inspection phase, two are pending IOU approval, four are in review, three are overdue and two in suspended status awaiting corrections. Based on application timelines and reporting progress, the SOMAH PA anticipates an increase in projects moving toward incentive payment in the second half of 2025.

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



N = 746

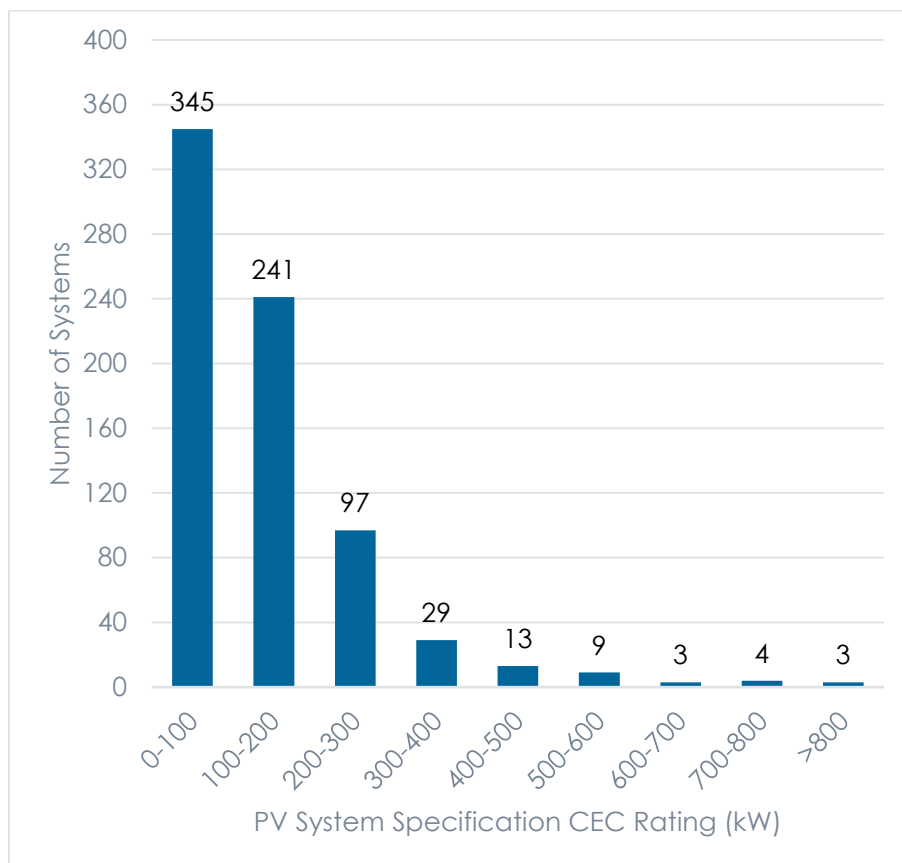
Validating each project's system size with aggregated annual electrical consumption history from IOU data requests is a key step of the reservation request, prior to approval. Historic electrical consumption directly influences the system's final sizing. Figures 17, 18 and 19 outline system size statistics for the average and largest projects across the IOU territories.

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

Program	Pending Reservation Approval	Reservation Approval Received	Complete/ Incentive Paid	Cancelled/ Withdrawn
PG&E	170.6	148.8	112.1	174.6
SCE	197.6	183.9	172.6	210.5
SDG&E	126.9	141.5	140.8	152.0
Liberty Utility	0.0	55.2	0.0	93.2
PacifiCorp	0.0	0.0	0.0	111.6

N = 1,090

**Figure 19 – Distribution of System Sizes (kW)**



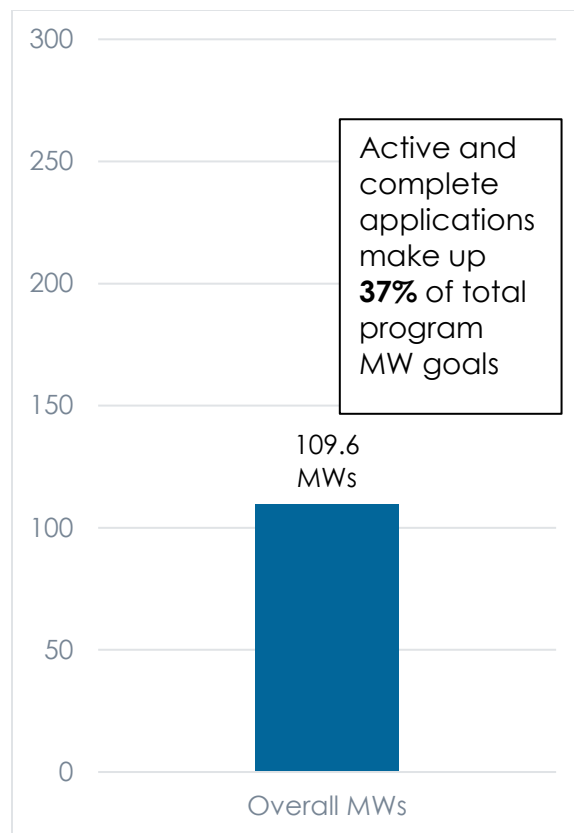
N = 746

From the projects with approved reservations, application data from PowerClerk shows projects reduce their system size by an average of 18.75% from initial submission. The



trend to reduce the system size after IOU consumption data sharing (post-reservation submittal and pre-reservation approval) continues. However, application data from PowerClerk also shows newer projects (submitted in 2025) are trending with smaller adjustments overall, even when compared to projects submitted in 2024. Of the 107 applications that reached reservation approval in Q1-Q2 2025, 61 projects adjusted their system size during the Reservation Request Milestone, while the remaining 46 maintained their originally submitted system size through reservation approval. Of the 61 projects that adjusted system size, 31 projects increased the system size from what was originally submitted, a different trend from previous years. 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.

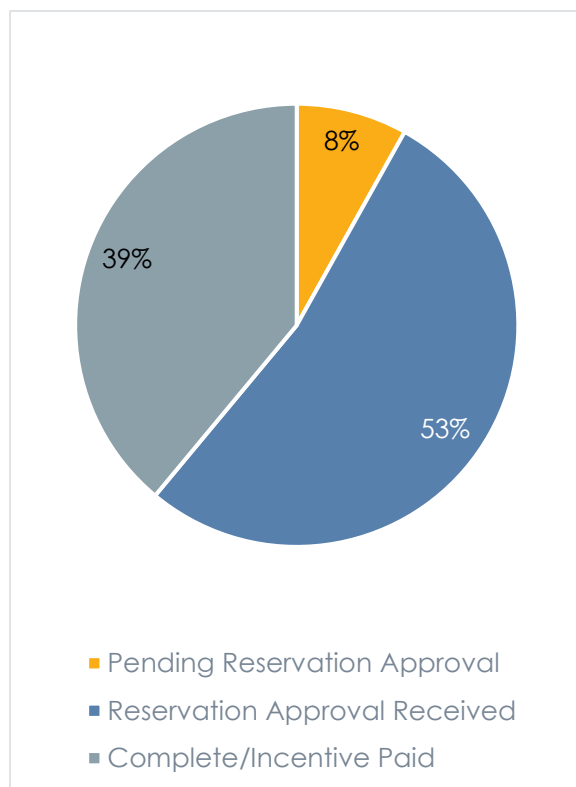
**Figure 20 – Progress to 300 MW**



N = 746



**Figure 21 – Percentage of Program MW by Reservation Type**



N = 746



Additionally, the average system cost is \$4.29/watt CEC-AC<sup>18</sup> with a total expected aggregated annual output of 101,970,424 kWh<sup>19</sup> for the active<sup>20</sup> SOMAH projects in queue. Completed projects made up 39% of total application volume at the close of Q2 2025. This percentage remains consistent with the ratio of active to completed applications at the end of 2024, illustrating a continuation of the 2024 trend that reported the number of new applications and the number of completed projects increasing proportionally. The percentage of pending reservation approval projects decreased from 9.8% at the end of 2024 to 8% at the close of this reporting period. The decrease in the percentage of applications awaiting reservation approval is slight and reflective of the slightly lower number of new applications received this reporting period.

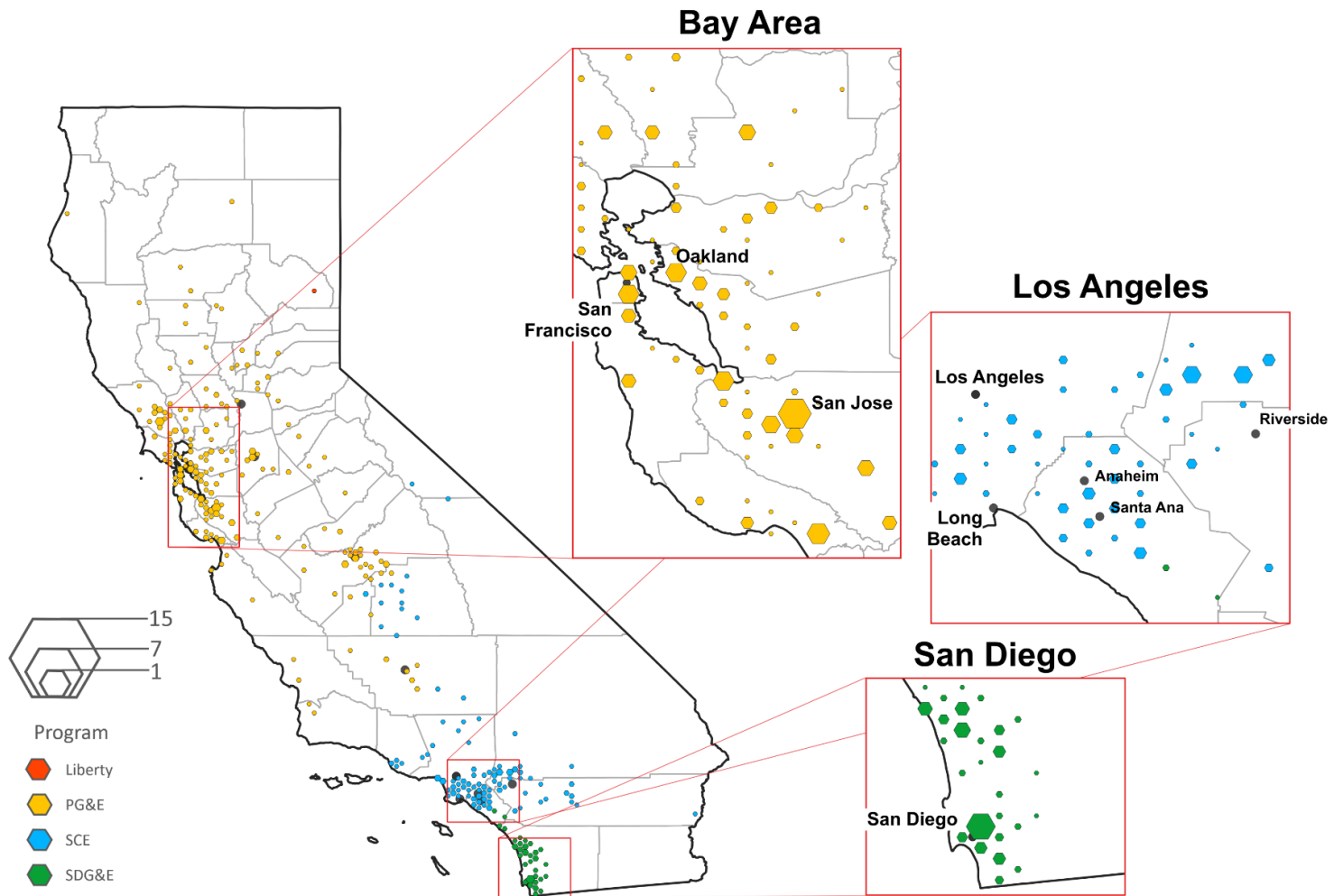
Figures 22 and 23 show the geographic distribution of property locations for applications received and completed projects to date. A more detailed view is provided for higher density project regions in the San Francisco Bay, San Diego and greater Los Angeles areas.

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

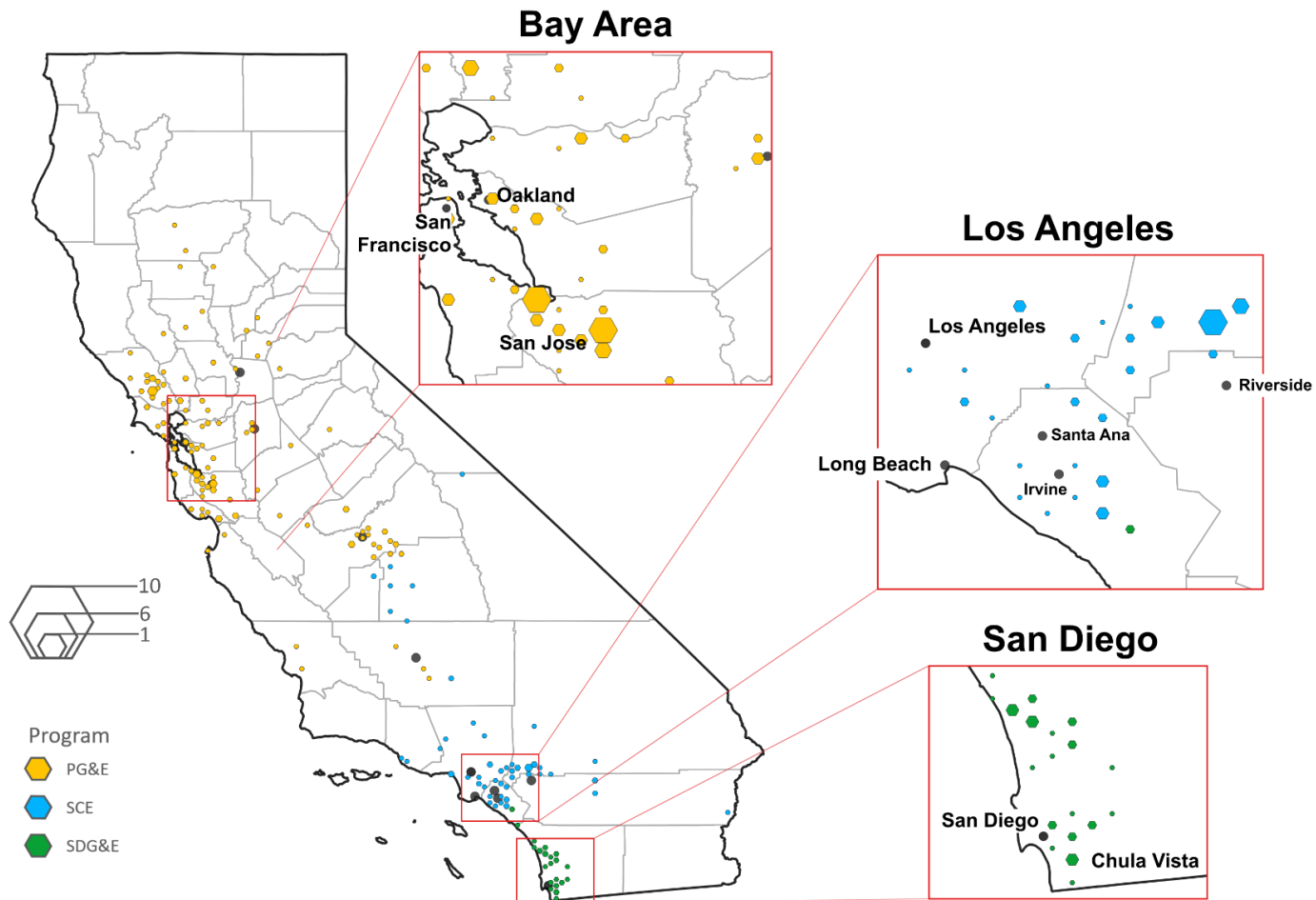
<sup>19</sup> Expected aggregated annual output is an estimate based on the PV equipment and system configuration specifications currently listed for all active applications in PowerClerk. This figure is subject to change based on updated system designs for projects in queue. System components and configuration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

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

**Figure 22 – Active Project Density and Location Visualizations**



**Figure 23 – 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 increased contractor diversity. The development of progress payments included PA consultation with program participants and stakeholders to develop the two-payment pathway. The eligibility window for the minimum time requirement between progress payment and incentive claim is two months. 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 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 24, 378 applications opted in to the Progress Payment Pathway, amounting to \$112,001,968 in incentives paid out. As a result of the popularity of the Progress Payment Pathway and to streamline the administrative process, progress payments will become the default option pursuant to D.24-11-006. Projects will be able to opt out and pursue a single, final payment if a project chooses, and the program requirements for the progress payment will not change. 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 indicates an approved opt-in to the Progress Payment Pathway and the resulting progress payment amount. Since launching the Progress Payment Pathway in April 2021, the offering's popularity has continued to increase over time, with 378 projects choosing this option in the past five years. The program's progress payment history is summarized by the payment list below:

- 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 throughout its launch. After its first year, 2022 had 50 additional progress payments issued, 2023 had 64 additional progress payments issued and 2024 had 193 total progress payments issued. The SOMAH PA anticipates this year's volume to remain high, with Q1-Q2 2025 having 66 progress payments in the process of being completed so far. In total, 229 of the projects that 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:

- 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

More than half (57%) of applications eligible to receive the two-payment pathway have opted into progress payment. At the end of Q2 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 Q1-Q2 2025 and is expected to continue increasing in the second half of 2025. Figure 24 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 24 – Program Payment Statistics<sup>21</sup>**

Program	Progress Payments Issued	Progress Payment Amount	Final Incentive Payments Issued	Final Incentive Payment Amount	Total Incentive Payment Amount
PG&E	247	\$35,868,837	199	\$20,341,326	\$56,210,163
SCE	90	\$22,379,410	81	\$20,120,976	\$42,500,385
SDG&E	41	\$6,751,057	34	\$6,540,363	\$13,291,420
Liberty Utility	0	\$0	0	\$0	\$0
PacifiCorp	0	\$0	0	\$0	\$0
<b>Total</b>	<b>378</b>	<b>\$64,999,304</b>	<b>314</b>	<b>\$47,002,664</b>	<b>\$112,001,968</b>

With the progress payment volume remaining high, the number of inspections has decreased since Q3-Q4 2024 but remain steady throughout Q1-Q2 2025. Q1 and Q2 2025 had 68 inspections completed across PG&E, SCE and SDG&E territories, with six in the process of being scheduled. In comparison, Q3-Q4 2024 had a dramatic uptick of inspections, with 125 inspections completed. This was the highest volume in program history. The SOMAH PA expects more inspections to come in throughout the year as projects continue to finish construction and reach program completion. There was also a decrease in the final payment activity in this reporting period with 85 projects in Q1-Q2 2025 receiving final incentive payments. Although the Q3-Q4 2024 reporting period had the highest final incentive payments issued so far, with the continuation of

<sup>21</sup> Progress Payment Amount total and Final Incentive Payment Amount total include some invoiced, pending payments.



inspections, the SOMAH PA expects a steady number of projects receiving their final incentive payments throughout the remainder of 2025. In total, 314 projects have received their final payment, and 73% of those projects opted for a progress payment. The program's first final payment was issued in Q4 2020, and there was a 6-month gap in payments in the beginning of 2021. Payments picked up in the second half of 2021, and from then on, final payments have consistently been issued. With the continuous high volume in progress payments in Q1-Q2 2025, more than half of the projects that received their final payment have chosen the two-payment pathway rather than the standard one-payment option. The program's cumulative final payment history leading up to 314 final payments is summarized below:

- 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 payment issued
- December 2020: 1 final payment issued

In Q1-Q2 2025, 49 projects received progress payments, and two of those received a final incentive payment. Not all the reported projects have completed installations and received the final incentive payment as shown in Figure 24. 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 24, as well as analysis of payment timelines and progression details as additional projects are completed and paid.

### **Increased Incentive Reporting**

As of June 30, 2025, 245 projects of the maximum 306 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, \$7.6 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 2025 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 22 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 cancelled 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, in the first half 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 cancelled 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 cancelled 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 Online Bidding Tool**

The online bidding tool is a platform used to connect property owners with eligible SOMAH contractors, providing an apples-to-apples bid comparison. The platform is available for all SOMAH participants and can be used to meet the multiple bid requirement for Track A projects. The online bidding tool maintains a repository of eligible SOMAH contractors who have completed the Contractor Eligibility Training webinar and registered their primary contact information with the SOMAH PA.

The online bidding tool integrates with SOMAH's Project Bid Form. Contractors may have unique proposal generation tools and layouts with different underlying assumptions, however SOMAH's standardized Project Bid Form harmonizes the detailed



elements of a proposal into a consistent format containing objective and verifiable information. To provide the most accurate and best user experience, the SOMAH PA reviews the online bidding tool weekly to engage unresponsive contractors, perform outreach to contractors with expired licenses and remove contractors with suspended licenses.

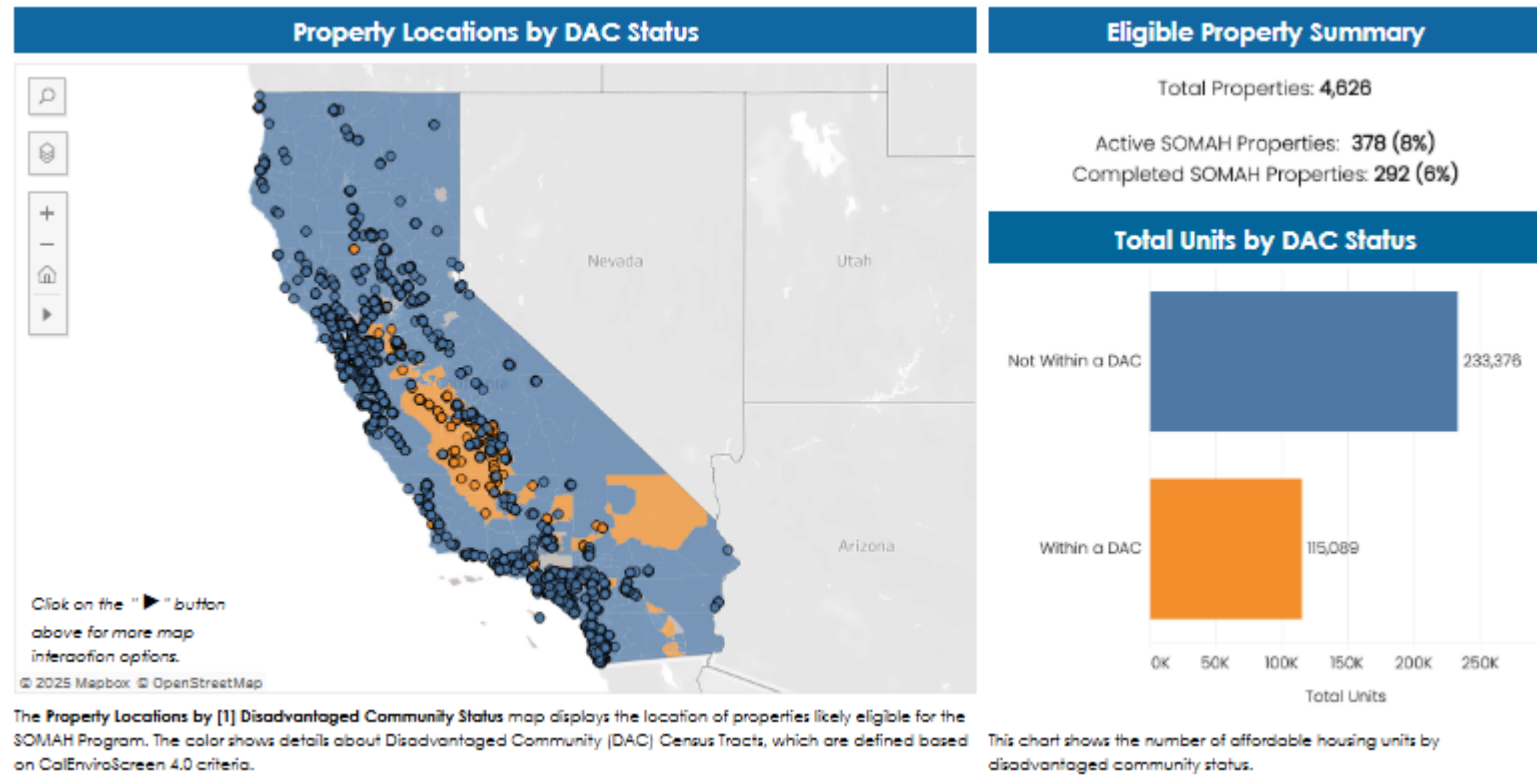
There are instances where directly communicating with solar contractors utilizing SOMAH's bidding resources results in greater bidding success, and while there was no new activity with the bidding tool in Q1-Q2 2025, successful bid solicitation processes were facilitated by the SOMAH PA for property owners participating in Track A. The lower engagement volume with the online bidding tool limits the amount of meaningful feedback and data available currently. The SOMAH PA is evaluating the future of the online bidding tool to provide resources for property owners that result in greater bidding success.

### 3.1.4 Eligible SOMAH Properties Map

Figure 25 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 987 page views in Q1-Q2 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 designed 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 May 1, 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, senate and assembly district, 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 25 – 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 in-process (active), completed (installed and paid), waitlisted (when applicable) and withdrawn and/or cancelled projects. Reported data includes, but is not limited to, application data, contractor information, incentive amounts and solar PV system cost and technical specifications. All personally identifiable information is scrubbed from the data set to ensure customer privacy. The data set includes [two resources](#), a “Data Key” and “Read Me” PDF for download. The Data Key is a short summary of the data fields displayed in the working data set, and the Read Me includes a summary table of fields added and/or removed from the working data set, as well as the effective date, for further transparency and ease of use 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

As the SOMAH Program increases the number of completed projects, the PA's audience engagement has emphasized storytelling through success stories, blogs and social media posts. Activities have included planning ribbon-cuttings, in-person events and improved resources and tools. 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 federally recognized 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 Marketing, Education and Outreach Plan (ME&O Plan) guides the program's marketing, education and outreach activities, setting goals, objectives and tactics to reach SOMAH's priority audiences and 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 spread equitable sustainability for low-income and underserved communities (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 [webpage](#).

Drafting of the 2026 ME&O Plan begins next reporting period. Overall, the SOMAH PA plans to keep many of the ME&O goals the same as in previous years. Tactics and efforts that have proven successful will continue, while adjustments will be made to address any challenge areas and to 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 MEO efforts in the Liberty and PacifiCorp territories, removal of the tenant education requirement and an increased focus on outreach to affordable housing owners and operators and contractors to drive applications.

### 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 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 key audiences is used to inform ongoing ME&O outreach efforts and the application process. See Figure 26 for a summary of planned and completed



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

**Figure 26 – 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

In addition to surveys, the SOMAH PA began conducting future-focused research. This research is designed to 1) identify opportunities to increase diverse contractor participation in SOMAH as prime or subcontractors, 2) spot opportunities to increase overall property owner participation, 3) evaluate program retention and 4) understand the market for SOMAH.

During the current reporting period, no ME&O research was conducted by the SOMAH PA. As future projects are considered based on program priorities, The SOMAH PA will include them in future reports. 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.

### 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 will begin to formalize how in-bound and out-bound contractor outreach is reported in this and future SOMAH SAPRs. Figure 27 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 27- Points of Interaction with Potential Contractor Applicants**

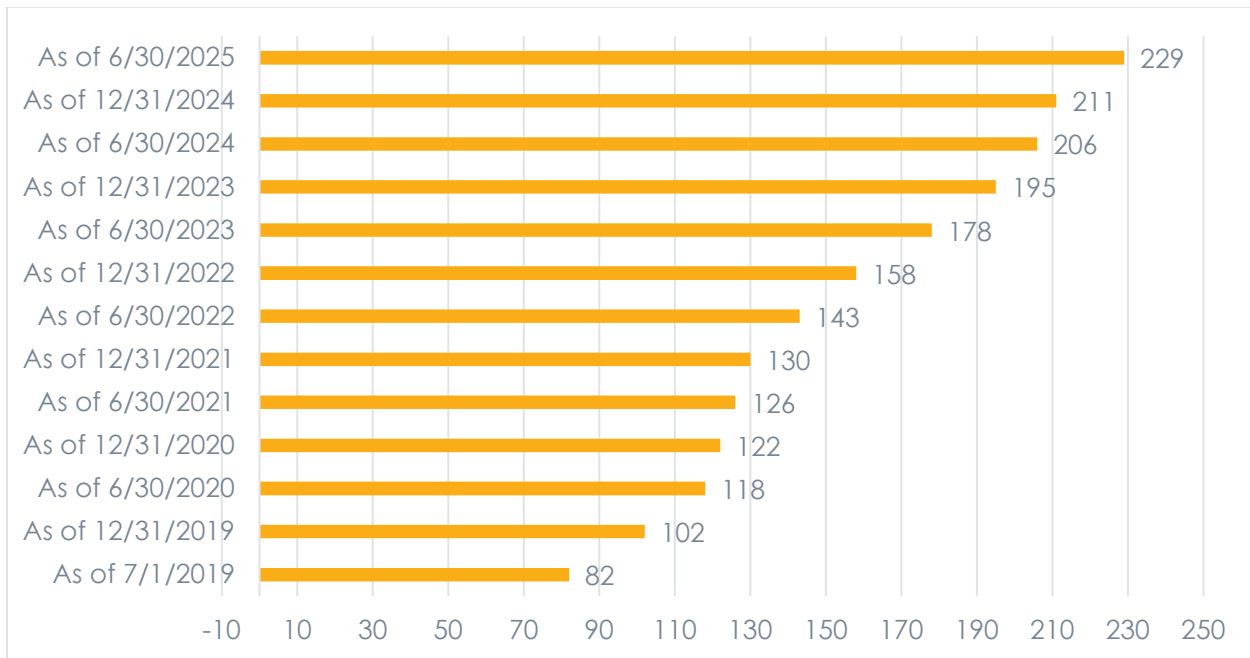
	<b>IOU or Tribal</b>	<b>Initial Interactions</b>
<b>Initiated by Potential Applicant</b>	Liberty	0
	PacifiCorp	0
	PG&E	5
	SCE	2
	SDG&E	1
	Unknown IOU Service Territory	179
<b>Initiated by SOMAH PA</b>	Liberty	0
	PacifiCorp	0
	PG&E	37
	SCE	4
	SDG&E	1
<b>Total</b>		<b>229</b>

The PA continues to engage contractors through ongoing quarterly Applicant and Contractor Eligibility Trainings. During this reporting period, eligibility training sessions were held in January and April 2025. The applicant and contractor training sessions had a total of 49 attendees out of 95 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 and X channels. At the close of this reporting period, there were a total of 229 SOMAH-eligible contractors, as shown in Figure 28.





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



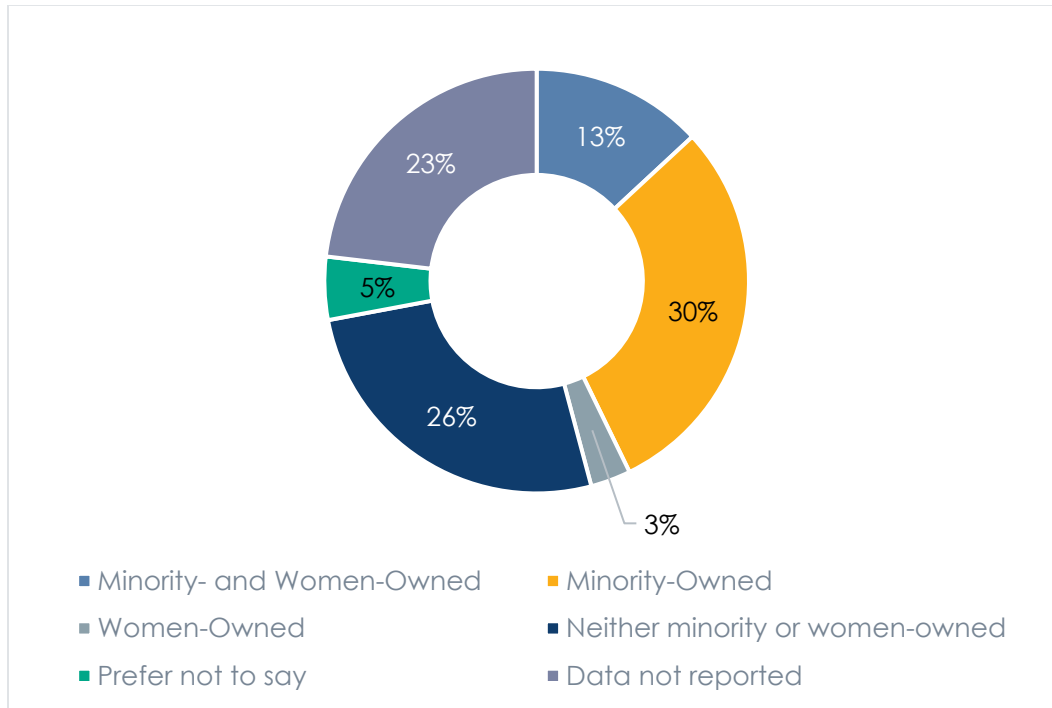
This reporting period, there were 18 new SOMAH-eligible contractors and an increase in affordability prescreen submittals. The PA continues to prioritize outreach to contractors and trade allies to boost program participation. During this reporting period, the PA engaged with Multifamily Energy Savings Program trade allies to promote co-enrollment in both the SOMAH and MFES programs. This outreach resulted in three MFES contractors participating in SOMAH's Contractor Eligibility Training and, as a result, becoming SOMAH-eligible contractors.

To help increase participation in the Liberty and PacifiCorp territories, the PA will continue targeting outreach to contractors located in or serving these areas. The PA plans to share a case study about the removal of the Expected Performance Based Buydown (EPBB) to promote engagement and encourage program participation in these territories and regions affected by the removal.

Office hours webinars were started in 2023 to address topics contractors had expressed difficulty in understanding and provide an open forum for questions. During this reporting period, the PA offered one applicant and contractor office hours webinar. In May 2025, SOMAH's Office Hours Webinar discussed lead generation with a focus on available tools and resources on the SOMAH website. Twenty-seven contractors registered for the webinar and 11 attended. SOMAH will host a second office hour in Q3 2025. This session will cover how SOMAH projects can co-enroll in other energy efficiency programs, focusing specifically on the Multifamily Energy Savings Program.



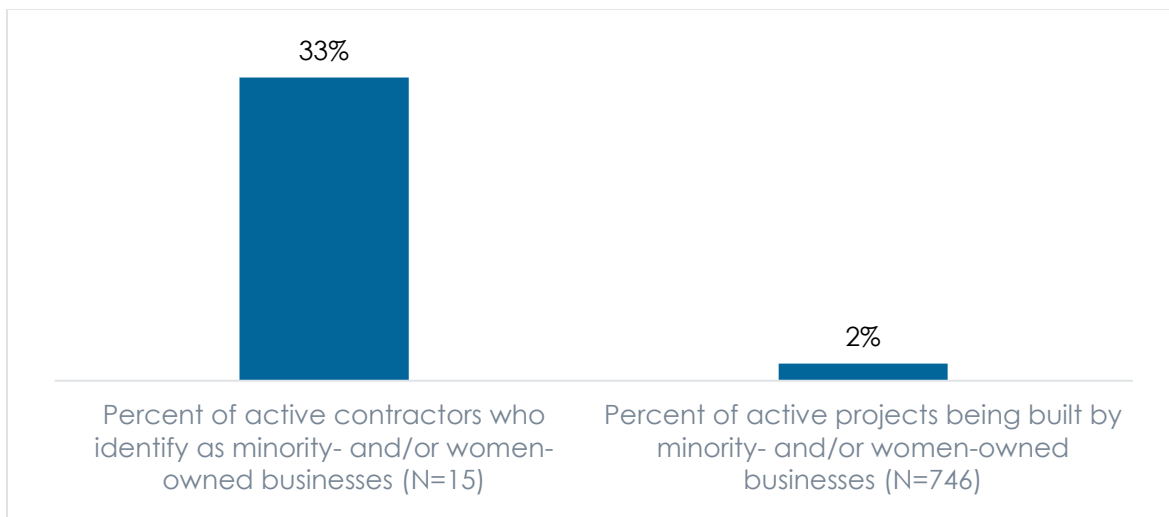
**Figure 29 – Eligible Contractor Statistics**



N = 229

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 229 SOMAH eligible contractors, 127 identify as small companies, 98 identify as minority owned and 37 identify as woman owned.

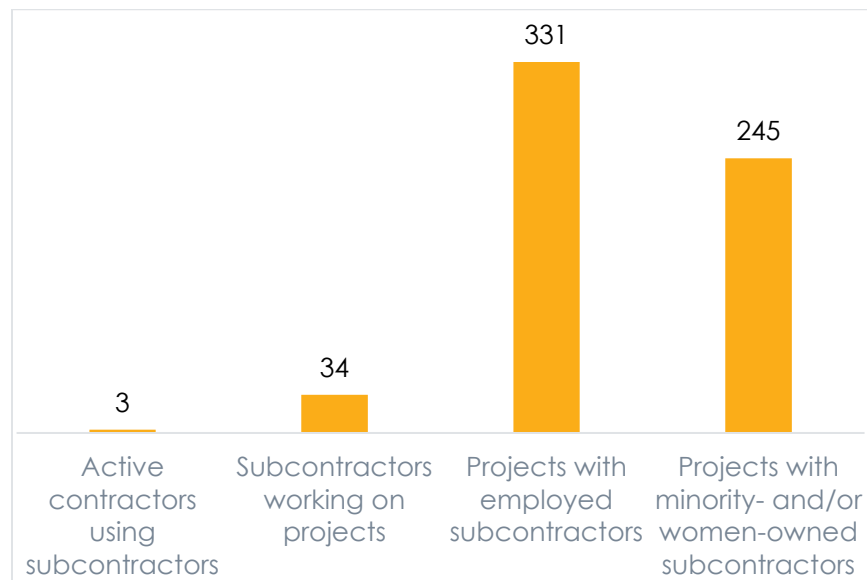
**Figure 30 – Active Contractor Diversity**





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 34 subcontractors that have participated in or are currently working on a SOMAH project. Currently, three contractor companies are using subcontractors on a total of 331 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.<sup>22</sup>

**Figure 31 – Subcontractor Statistics**



The forthcoming Handbook 9 changes (initiated by D.24-11-006) are anticipated to reengage contractors and increase application submissions. These updates include incentives for integrated storage systems, revised job trainee requirements and application streamlining. In the next reporting period, the PA will focus on targeted outreach through informational webinars, updated resources and tools and direct

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



communication with contractors and trade allies to ensure they are informed about the new requirements and opportunities available through 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, webinars, conferences, social media, paid media campaigns and video content.

Per D.24-11-006, the SOMAH PA will begin to formalize how in-bound and out-bound property owner outreach is reported in this and future SOMAH SAPRs. Figure 32 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 32- Points of Interaction with Potential Property Owner Applicants**

	<b>IOU or Tribal</b>	<b>Initial Interactions</b>
<b>Initiated by Potential Applicant</b>	Liberty	0
	PacifiCorp	0
	PG&E	1
	Tribal	0
	SCE	0
	SDG&E	0
	Unknown IOU Service Territory	65
<b>Initiated by SOMAH PA</b>	Liberty	2
	PacifiCorp	17
	PG&E	64
	Tribal	25



	SCE	106
	SDG&E	3
<b>Total</b>		<b>283</b>

### Direct Email Outreach

Direct outreach emails were sent to invite property owners to events, highlight prospective SOMAH projects, provide information on how to request the program's suite of Technical Assistance and Support Services (including Technical Assistance Preview Reports), offer one-on-one portfolio reviews with a SOMAH PA member and introduce the SOMAH Program through a PowerPoint overview of the program, eligibility requirements and available incentives. Figure 32 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. Examples include public housing authorities, tribal entities and properties with higher income thresholds. To engage these property owners, the PA initiated multiple outreach campaigns to ensure that property owners had various communication touchpoints with SOMAH. 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 that serve public housing authorities and tribes, as well as properties in high priority areas, such as the Central Valley and Liberty and PacifiCorp territories.

Additionally, the SOMAH PA conducted a canceled applications campaign with quarterly direct outreach emails and an email nurture campaign to targeted applicants with cancelled applications. Direct outreach messaging focused on troubleshooting previous projects with Technical Assistance and Support Services and identifying other properties in company portfolios. The email nurture campaign sent six automated emails to previously enrolled applicants with messaging focused on resources for host customers, such as the available Technical Assistance and Support Services, financial feasibility, updated eligibility requirements and increased incentives. The goal of the email nurture campaign was to encourage these prospective leads to consider re-enrolling their projects and/or working with the SOMAH PA to identify additional properties in their portfolio that may be eligible for the program.



During this reporting period, tribal outreach was limited as the PA awaited the Handbook 9 approval. The SOMAH PA connected with partner organizations that serve tribes including GRID Alternatives' Tribal Program and Siskiyou County Housing to share program updates, discuss prospective projects and identify co-marketing opportunities. Additionally, the SOMAH Program made significant strides to create more financial opportunities for tribal entities to take advantage of solar incentives. 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 PGE, 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. The focus of Q3-Q4 2025 outreach messaging will be on these updates to engage tribes.

### **Property Owner Outreach Events**

The PA attended two in-person conferences, both of which primarily targeted affordable housing audiences. Additionally, SOMAH co-presented with TRC for the webinar, "Energy Efficiency Unleashed: Transformative Strategies to Maximize Affordable Housing Savings." This presentation included an overview of the SOMAH Program, available incentives, the enrollment process and how to leverage Technical Assistance and Support Services.

- Housing California Conference 2025 (March 5-7, 2025)
- Energy Efficiency Unleashed: Transformative Strategies to Maximize Affordable Housing Savings (March 26, 2025)
- NAHRO Conference 2025 (May 28-30, 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. The PA cannot distinguish or report on demographic information of followers, per D.24-11-006. Therefore, the PA will report on general follower numbers per platform.

**Figure 33 – Social Media Followers**

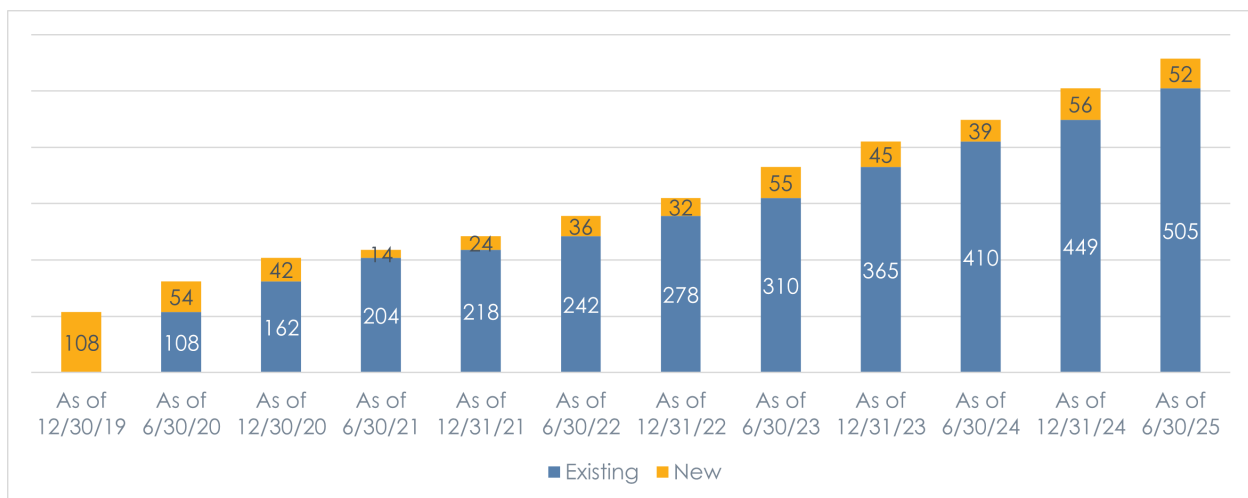
<b>Facebook</b>	<b>Instagram</b>	<b>LinkedIn</b>	<b>X</b>
114	178	532	152



This reporting period, SOMAH was mentioned in 19 unique news media articles and 24 reprints, resulting in an estimated total UVM (unique visitors per month) of 26 million, with an average UVM of 604,000 per article. The media coverage generated 27 total reporter engagements, though engagement metrics such as shares, and reach remained low. The dominant source of coverage was a syndicated wire release by Sunrun, accounting for 41 articles that highlighted solar installations at three affordable housing communities in Southern California. These articles primarily appeared in regional or aggregator outlets and emphasized energy bill savings for approximately 800 renters. Besides the Sunrun coverage, one article mentioned GRID Alternatives in connection to SOMAH and another semi-technical article referenced the program in the context of broader solar industry trends. There were no mentions in major media outlets, and overall coverage leaned heavily on repurposed press content rather than earned media visibility.

The CalSOMAH email listserv provides important program updates, including funding announcements, program changes and alerts about upcoming events and webinars. The listserv added 52 additional property owners during this reporting period.

**Figure 34 – Property Owner Subscribers Over Time**



### 3.2.5 Tenants

The primary objectives of tenant education are to ensure residents of potentially eligible SOMAH properties and those living in participating properties are aware of the program and able to benefit from SOMAH in an equitable manner.



## **Tenant Education Services**

The SOMAH PA continues to promote Tenant Education Services through quarterly tenant education trainings and webinars, including the Applicant and Contractor Eligibility Trainings and public forums. As an essential tool for tenants, the SOMAH PA has prioritized promoting the Tenant Education Hotline, specifically focusing on the hotline during workshops and training sessions. In Q1-Q2 2025 the SOMAH PA received four phone calls to the tenant hotline from four unique callers connected to four separate SOMAH projects.

Though all calls to the tenant hotline highlight the need for Tenant Education Services, one call in particular demonstrated the importance of having a tenant base that is educated in SOMAH. The tenant was looking for support due to recent months of higher-than-normal electrical bills. Thorough research and a review of the caller's recent bills revealed that, for the three previous months, the utility had added solar production allocated to the tenant as consumption instead of a credit. Through communications initiated by the SOMAH PA, the utility was quick to resolve the issue, credit the tenant for the overpayment and work on a solution to prevent this from happening again. The PA provided additional support to the tenant in receiving adequate compensation in the form preferred by the tenant, which was a check instead of credits. Having the funds back in their bank account allowed them to cover expenses and critical needs that went unfulfilled due to overpayment of their utility bills for three months.

Offering Tenant Education Services and personalized support from the SOMAH PA facilitates relationship building leading 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 trusted relationships with someone they can turn to with any questions, issues or concerns.

Two tenant-related workshops were held during this reporting period. One in-person education workshop was held at a property in Fresno and supported by the CBO SHE. Spanish interpreters were hired to facilitate on-site translation. Additionally, a virtual workshop, called Train the Trainer for property managers, was facilitated by the PA and CBO partners GRID, AEA and SHE – the first time this type of workshop had been co-sponsored.

The SOMAH PA also continues to review affidavits to ensure the tenant education requirement for contractors and property owners is met. In Q1-Q2 2025, 73 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.



In 2024, a CPUC Ruling eliminated the SOMAH Program's tenant education requirement for contractors and property owners, which will go into effect July 1, 2025. Projects with applications submitted before July 1, 2025, will still be subject to tenant education requirements.

The SOMAH PA is conducting a revision of the Tenant Education Toolkit and Tenant Education Services with plans to finalize them in the second half of 2025. Revisions will 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 complete and interconnect with the IOUs, more tenants are becoming aware of the solar projects at their properties and how they will benefit. With more completed projects, SOMAH 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 three months.

Tenants are central to the SOMAH Program, and the economic relief SOMAH aims to provide to 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, elected officials, IOUs, CCAs, Regional Energy Networks (RENs) and California energy efficiency program administrators. Building and maintaining partnerships with these stakeholders strengthen the credibility of the SOMAH Program and help 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 through RENs and the IOUs, speaking at





stakeholder-led events and webinars, and developing co-marketing materials. The following sections summarize the PA's accomplishments in Q1-Q2 2025.

### **IOUs, CCAs and RENs**

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's Single Point of Contact (SPOC) services and the statewide Multifamily Energy Savings (MFES) program. To raise awareness of MFES, updated information was added to the SOMAH website for co-marketing.

During Q1-Q2, SOMAH conducted co-marketing of the SCE Charge Ready program for multifamily properties interested in installing electric vehicle charging stations. The PA also met with SoCalREN's multifamily energy efficiency program team to discuss program overlap, co-enrollment and program eligibility. Co-marketing the program has helped spread program awareness to customers of participating IOUs. In addition, the PA continued to track co-enrollment with the Multifamily Energy Savings Program (MFES). 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 three government offices in Southern California. This included the cities of Santa Monica, Imperial Beach and Moreno Valley. The SOMAH PA continues efforts to prioritize fostering relationships and participation in communities with lower program engagement. As a part of this effort, the PA plans to continue direct outreach to local government offices in Q3-Q4 2025, with the goal of sharing the program's new updates with the implementation of Handbook 9.

## **3.3 Workforce Development**

A primary goal of the SOMAH Program is to promote economic development in low-income and underserved communities through paid job training opportunities, emphasizing local and targeted hiring of 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 860 job opportunities and 53,040 trainee hours. The current SOMAH application pipeline is projected to create 1,363 job training opportunities and 86,600 trainee hours. To broaden SOMAH's pool of eligible job trainees, the PA continues to engage with JTOs that serve targeted trainees and geographic regions where participation has been lower historically, including Northern California, Central Valley and Central Coast. 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.

During Q1-Q2 2025, there were 95 active JTOs in the JTO Directory. In this reporting period, the SOMAH PA prioritized existing JTO partnerships. Fifty-nine new trainees were added to the SOMAH Job Training Portal for a total of 600 job trainees 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 Q2, the SOMAH PA Workforce Development Team held a webinar for job trainees and job training organizations, called The Solar Job Search, which discussed different career pathways in the solar industry and how to find and apply for solar 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.



Additionally, the SOMAH PA organized programming to help contractors meet their job training requirements and support the program's local and targeted hiring goals. In March 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 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

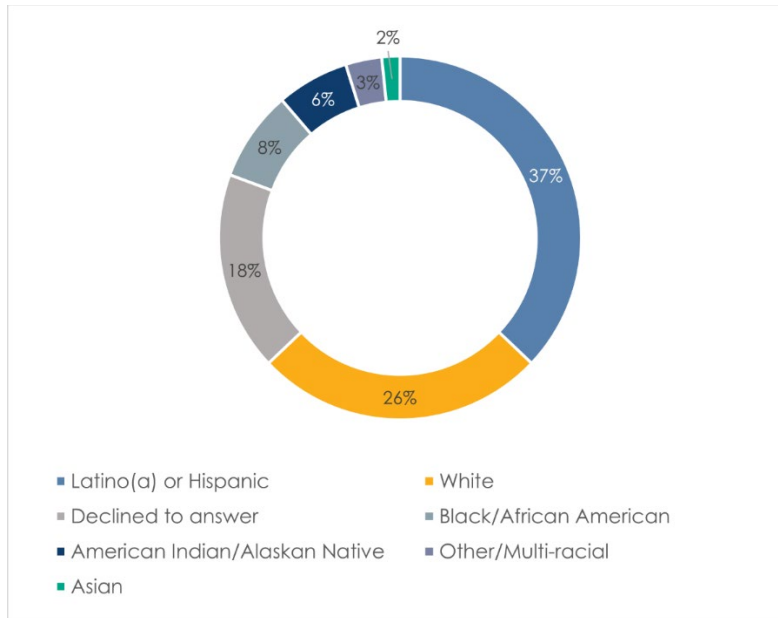
During this reporting period, the SOMAH PA received 85 Job Training Affidavits from projects that reached the Incentive Claim Milestone for a total of 323 projects that have submitted affidavits. The Job Training Affidavits submitted in Q1-Q2 2025 report 154 job training opportunities. To date, 48% of 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 62 of the 150 job trainees hired through the Job Trainee Intake Form (Figures 35-41 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 629 job training surveys, with 44 job trainees reported as hired by contractors for continued employment.

#### Local & Targeted Hires:

- 94% of job trainees were targeted hires.
- 43% of job trainees reside in DACs.
- 19% of job trainees were local hires living in the same county as the SOMAH project.
- 51% of job trainees reported being unemployed or underemployed at the time of SOMAH intake.
- 23 tenants of SOMAH properties participated as job trainees.
- 43 job training organizations have students or graduates who have participated in SOMAH job training opportunities.
- \$46.66: average trainee hourly wage.
- 60.58: average training hours per project per trainee.

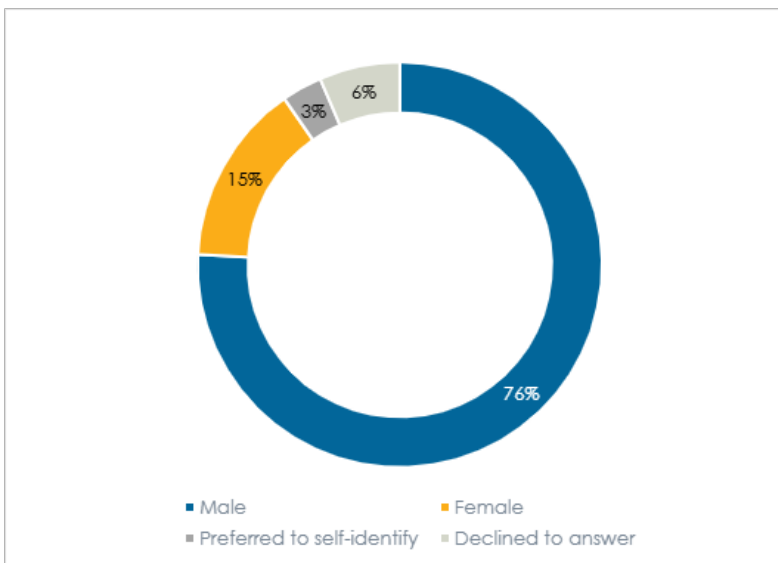
**Figure 35 – Job Trainee Race/Ethnicity Breakdown**



N = 62

Figure 35 is a snapshot of SOMAH project job trainee breakdown by race/ethnicity. Latino(a) or Hispanic trainees comprise the majority of SOMAH trainees, totaling 37%.

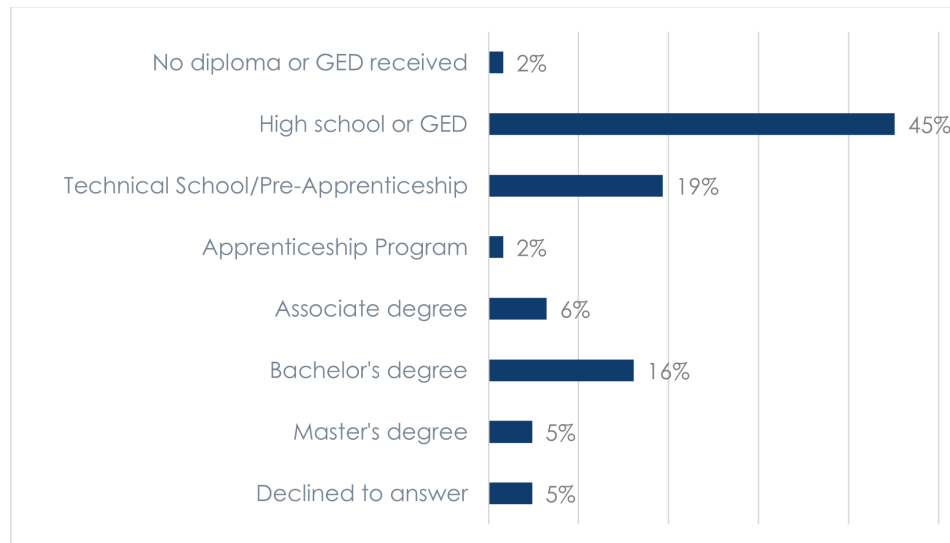
**Figure 36 – Job Trainee Gender Breakdown**



N=62

Figure 36 is a snapshot of SOMAH project job trainee breakdown by gender. Most trainees (76%) identify as male, while 15% identify as female.

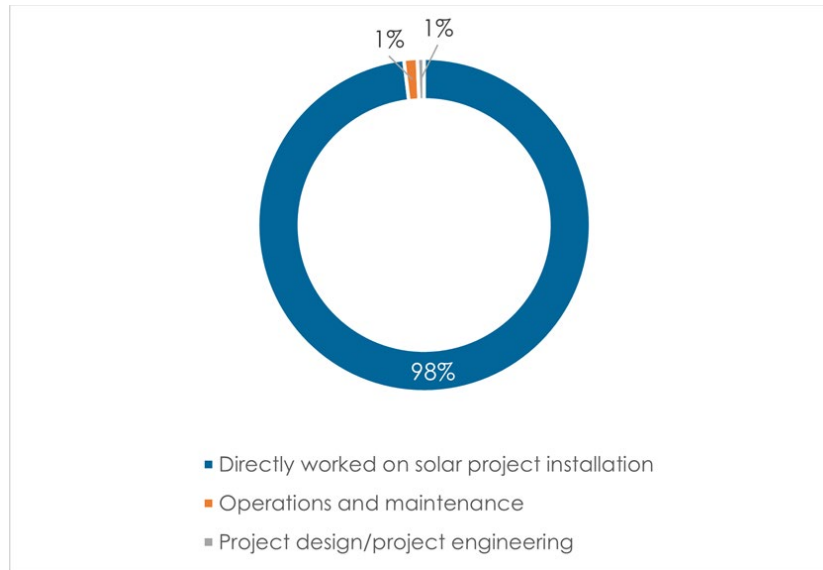
**Figure 37 – Highest Level of Job Trainee Education**



N = 62

Figure 37 is a snapshot of SOMAH project job trainee breakdown by the highest level of education attained. A total of 68% of job trainees participated without a college degree, while 21% of trainees participated after attending a technical school/pre-apprenticeship or apprenticeship program.

**Figure 38 – Percentage of Trainee Placements by Project Role**



N=154

Figure 38 is a snapshot of SOMAH project job trainee breakdown by project role placements, with 98% of tasks assigned being directly related to solar installation.

**Figure 39 – Average Trainee Wage Compared to CA Minimum Wage**

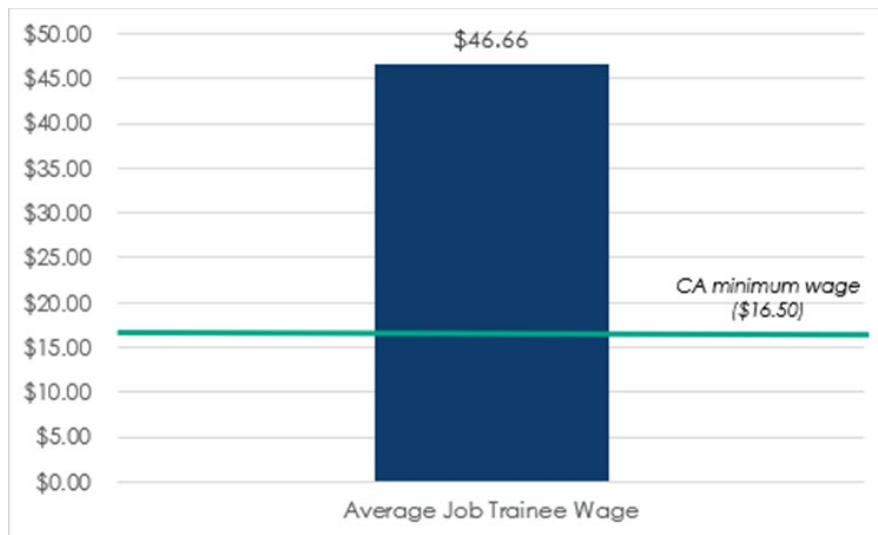


Figure 39 is a snapshot of SOMAH project job trainee average wage relative to California's minimum wage. On average, SOMAH job trainees earn \$46.66/hour, greatly surpassing the California minimum wage of \$16.50/hour.

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

**Figure 40 – Hours per Job Trainee Placement**

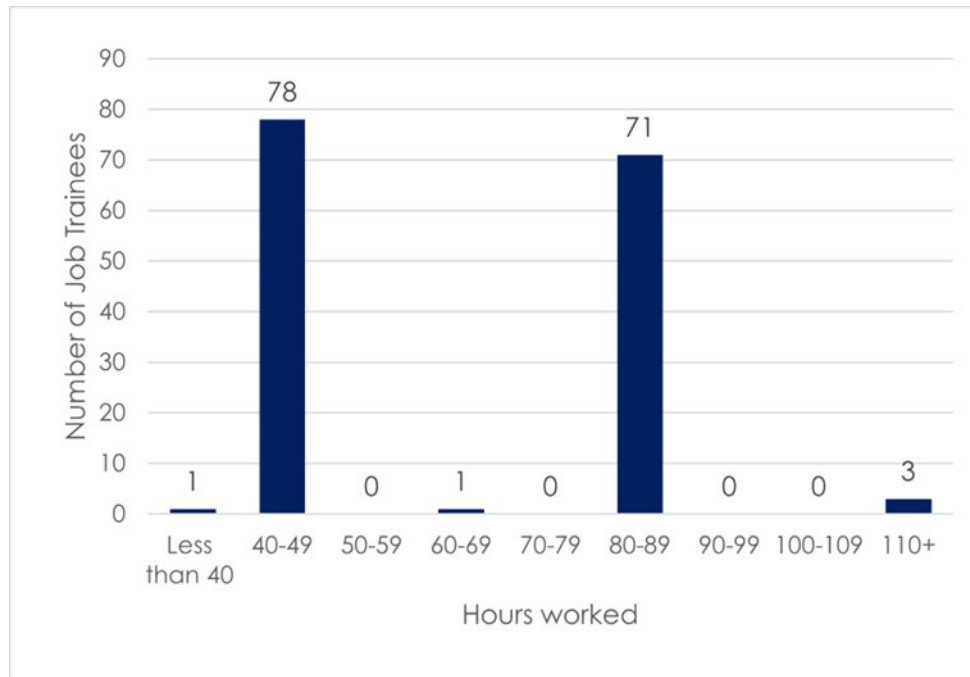
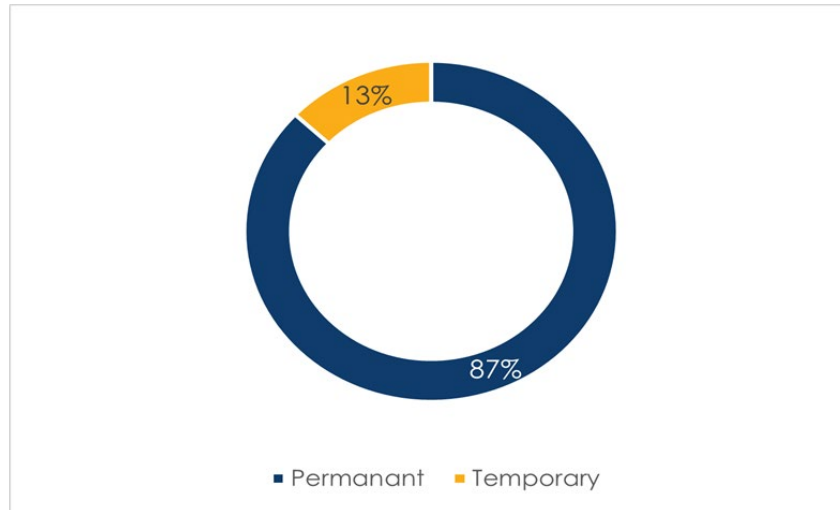


Figure 40 is a snapshot of the number of SOMAH job trainees and the hours they worked. Most trainees worked more than 40 hours on their project, with 51% of trainees working 40-49 hours and 46% of trainees working 80-89 hours.

**Figure 41 – Percentage of Trainee Placements by Employment Status**



N=154

Figure 41 is a snapshot of SOMAH project job trainee breakdown by employment status, with 13% of SOMAH trainees classified as temporary workers during their tenure with the respective contractor for this reporting period. A total of 87% of trainees were hired as full-time employees after their work on a SOMAH project.

### 3.4 Community-Based Organizations

During this reporting period, the SOMAH PA continued to partner with eight community-based organizations (CBOs) who supported the program's direct outreach in their respective service areas. CBO partners' priority audiences include property owners, tenants, and local stakeholders (with an emphasis on co-marketing partnerships.) The eight SOMAH CBO partners are:

- California Environmental Justice Alliance (CEJA)
- Asian Pacific Environmental Network (APEN)
- Environmental Health Coalition (EHC)
- Communities for a Better Environment (CBE)
- Self-Help Enterprises (SHE)
- Community Environmental Council (CEC)
- The Niles Foundation (TNF)
- OC Goes Solar (OCGS)





Six of the eight CBO partners are continuing to work on the SOMAH Program through the end of the year, while two have decided to step away from the program. APEN ended their official scope of work in Q1 2025, and EHC ended theirs in Q2 2025. Both CBOs remain committed to the established partnership, offering to continue speaking about the benefits of the SOMAH Program when appropriate and if an organic opportunity arises.

SOMAH PA hosted two virtual CBO summits that brought together all partners to explore shared strategies, lessons learned and new potential opportunities.

Q1 2025 virtual meeting topics included:

- Property Owner Outreach
- CBO-led presentation on Property Owner mentality & opportunities to promote the SOMAH program
- Communities in Charge (CiC) Program Overview

Q2 2025 virtual meeting topics included:

- Tenant Education (after the requirement removal)
- CBO Local Stakeholder Outreach

SOMAH CBO partners continue to support property owner outreach through direct outreach efforts. CBOs conducted 1,036 outreach activities to engage property owners, including cold calls, emails, one-on-one meetings, presentations, mailers, attending affordable housing conferences and on-site visits. For all outreach efforts, CBOs prioritized communities within DACs. Figure 42 shows the number of direct points of contact with property owners in CBO partners' service areas.

**Figure 42 - Points of Interaction with Potential Property Owner Applicants**

	<b>IOU</b>	<b>Initial Interactions</b>
<b>Initiated by SOMAH CBO</b>	PG&E	33
	SCE	900
	SDG&E	103
<b>Total</b>		<b>1,036</b>



One Technical Assistance Preview Report was requested to show prospective program participants what the estimated solar benefits could be for their specific property.

CBOs have attended three external events aimed at bringing in new SOMAH applicants:

- TNF attended the BizNow Conference (November 2024) (SCE)
- CEJA tabled at the Fair Housing Council of Riverside County (April 2025) (SCE)
- SHE tabled at the CA Rural Success Summit (May 2025) (PG&E, SCE)

CBO partners directly engage with local stakeholders to coordinate co-marketing partnerships with the SOMAH Program. CBOs build and pursue leads by cultivating relationships with their contacts and presenting on the benefits of the SOMAH Program. During this reporting period, CBOs participated in 34 outreach activities to engage with local government stakeholders.

CBOs continue to support the SOMAH PA with Tenant Education Services. The CBO-led tenant education workshops tentatively scheduled for the start of this year were postponed due to interconnection delays and miscommunication with property managers. SHE's successful tenant education workshop at Blossom Trail in Sanger has kicked off an ongoing series of workshops with Fresno Housing Authority (FHA). In the first half of 2025, SHE supported the first "Train the Trainer" webinar alongside SOMAH PA to educate the Fresno Housing Authority property managers on the SOMAH Program. To date, SHE has led one tenant education workshop at Legacy Commons in Fresno, with more to come. Due to the tenant education requirement's removal starting July 1, 2025, the SOMAH PA will be working closely with the CBOs on strategies to continue to fulfill the program's commitment to equity and tenant engagement.

Workforce development support will continue to be tied closely with tenant education, such as by sharing job training opportunities at SOMAH properties when on site to speak about 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. In Q1 2025, CBE concluded the first SOMAH Pilot HeatSpring Academy program. The four community members that participated in the pilot have signed up to the Job Training Portal to apply for any upcoming workforce development opportunities. CEC's scope includes contractor engagement; they participated in nine outreach activities to engage contractors in the Central Coast, informing them about program requirements and Applicant and Contractor Eligibility Training Webinars.



CBO partnerships have proven to be extremely important in ensuring SOMAH outreach messaging and materials are appropriate, informative and intentional in reaching multifamily affordable housing providers, tenants, local stakeholders and potential job trainees across the state. (Note: Due to reporting requirements in CBO contracts, the KPIs above include the total number of outreach efforts in Q4 2024 to Q1 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, 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, 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, during 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 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.

### 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, 21 requests were made for various Technical Assistance and Support Services, totaling over 48 service types requested. Of the 21 requests made, 33% of the requests were initiated by solar contractors, which further supports the need



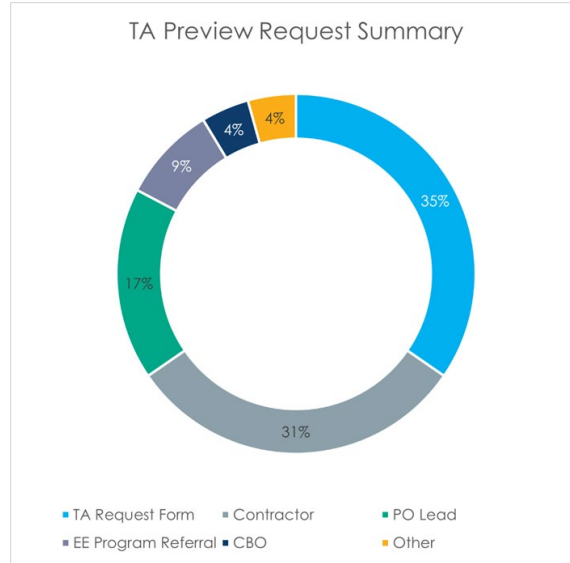
to have support services made available for and marketed to all parties involved with solar projects.

The most frequent service type requested was General Support (27%) from both property owners and solar contractors. By connecting with both property owners and solar contractors, and providing them with education and access to SOMAH resources, SOMAH's Technical Assistance and Support Services Team enabled six Affordability Prescreen requests and eight Track A application submittals. General support was also provided to answer questions related to program eligibility, specifically to new construction properties and homeowner's associations.

The second most frequent service type requested was for Technical Assistance Preview Reports (23%). For the reporting period, 23 preview reports were created and presented to prospective property owners as well as solar contractors. While the preview report was initially designed to help property owners decide if SOMAH enrollment is right for them, this reporting period showed an increase in preview report requests made by contractors. This concise two-page 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 reports support property owners in weighing 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 43 summarizes the sources of the preview report requests in Q1-Q2 2025. It is notable that 35% of the requests for preview reports came from property owners who submitted a TA Request form. Additionally, 31% of the requests came from solar contractors who were looking to peer review their preliminary system designs and understand the potential incentive amount available. The goal was for the contractor to integrate the details from the preview report into their discussions with interested property owners. This type of available support for contractors is invaluable to the program. One contractor who requested preview reports during the reporting period has since enrolled nine properties in the program and was also the selected contractor for a project receiving Upfront Technical Assistance.

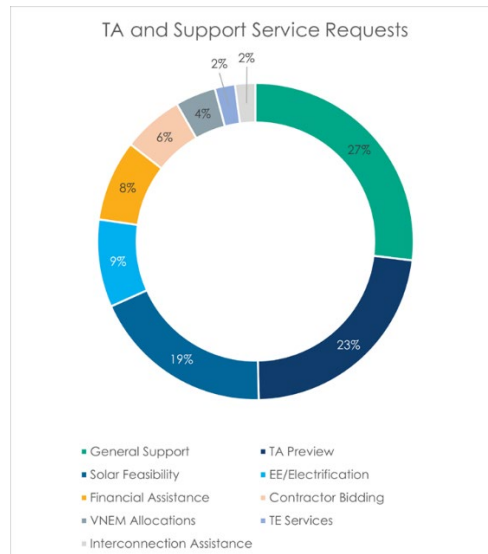
**Figure 43 – Technical Assistance Preview Report Request Summary**



N=23

Figure 44 summarizes the service types requested in Q1-Q2 2025. Solar feasibility and EE/electrification support were also frequently requested, with 19% and 9% of the requests, respectively. Understanding what service types are requested the most allows SOMAH to build out program resources or expand support services to better communicate and cater to those needs.

**Figure 44 – Breakdown of TA and Support Service Request Types**





N=48

### 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 and Support Services sets SOMAH apart from similar programs and provides property owners who may be less familiar with solar with equal access to program benefits. As a part of Upfront TA, property owners are connected to an energy project manager who serves as an objective third-party resource to answer questions and provide education and support as needed, 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 the program.

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 report, including a remote site assessment, incentive calculation and potential energy savings.
- Tools and metrics to help property owners source and compare eligible contractor bids with confidence.
- Guidance on usage data, financing options and what to expect after installation.
- Integration with energy efficiency, energy storage and electric vehicle programs.

To date, 40 projects have received Upfront TA and Support Services. Of those 40 projects, 23 projects are currently receiving Upfront TA and Support Services, eight projects are now at a later milestone in the SOMAH application life cycle and nine projects cancelled after receiving Upfront TA and Support Services.

Tenant benefits continue to be a central pillar of the SOMAH Program as well as a focus for projects participating in Upfront TA. For the 31 projects that have received or are currently receiving Upfront TA and Support Services, over 81% of the clean energy produced from the solar PV systems is projected to directly benefit the more than 1,400 low-income households via virtual net metering (VNEM) bill credits, offsetting over 76% of their expected historic electrical consumption.

Another cornerstone of Upfront TA is applying a holistic approach that considers energy efficiency upgrades and electrification at the same time as solar PV. This approach is



unique to SOMAH and a consideration that may often be missed for projects that do not participate in Upfront TA. 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 can provide thorough evaluations of a property's existing conditions and systems to facilitate referrals and enrollment in appropriate energy efficiency programs. As a result of SOMAH's support services, over 77% of projects participating in Upfront TA are pursuing deep energy retrofits in conjunction with solar by enrolling in comprehensive energy efficiency programs. The deep energy retrofits will improve indoor air quality, increase building safety and enhance tenant 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 are participating in Upfront TA that are part of a larger portfolio from one developer have since 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 developer's remaining portfolio of properties. Providing this guidance and related support services is the exact reason SOMAH's Upfront TA pathway exists.

SOMAH's Upfront TA pathway is also designed to overcome challenging and complicated situations at properties. For example, over 15% of properties participating in Upfront TA have existing PV systems that only benefit property owners. These properties require customized support to understand the feasibility and benefits of installing new SOMAH-incentivized PV systems that benefit tenants to expand or replace existing solar PV systems. For one developer with two projects both having existing property owner-only benefiting solar PV systems, a question around the performance of and savings from the existing systems led to a complex utility bill analysis that resulted in confirmation that the developer was not switched to the correct NEM tariff and therefore not receiving the full financial benefit of the solar since the system was interconnected in 2018. A utility rebill was initiated resulting in a credit of close to \$90,000 across five accounts. With more developers coming to SOMAH with existing systems, SOMAH's Upfront TA services are evolving to provide creative solutions and options for pathways forward to meet their renewable energy goals.

Additionally, Upfront TA services are continually evolving to improve resources and guidance specific to the Investment Tax Credit (ITC). Examples include partnering with a tax professional organization who can offer cost-effective audit, tax and consulting





services for specific projects. The consulting services are available to provide developers with guidance specific to the ITC and support customer protections and resource sharing on the latest tax news updates. Such guidance ensures property owners understand the steps and timelines involved in leveraging tax credits and other financial mechanisms that can make their projects more viable.

As a summary of the projects participating in Upfront TA, the average estimated system size for the 31 projects is 128.25 CEC-AC kW with an average expected aggregate annual output of 197,839 kWh. Figure 45 outlines additional system statistics across the IOU territories for the projects.

**Figure 45 – 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

As noted, 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 system owner is solely responsible for facilitating regular maintenance.





As of June 30, 2025, 310 completed SOMAH PV systems are connected and monitored in SOMAH's fleet monitoring platform SunSpot, which identifies solar PV 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 39 MW CEC-AC (over 110 million kWh); and overall, the fleet of completed SOMAH projects is performing at 96% 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, which translates to direct economic relief for low-income tenants. As an example of SOMAH's commitment to monitoring and maximizing system production, there have been several instances when SunSpot identified underperforming projects, project contacts were notified, and issues were found with inverters that led to replacing the defective equipment under warranty at no cost to the property owners. Continued monitoring post-equipment replacement showed that system performance improved, resulting in direct financial benefits for the property owners and tenants.

Additionally, 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 not report on the inverter's online monitoring platform and therefore not sync in SunSpot. Through a detailed analysis, over 30 projects were impacted by the metering arrangement. After direct communication with the installation solar contractor, and further investigation and troubleshooting, the contractor reported issues with the inverter meter and initiated replacements. Continued monitoring post replacement showed production alignment between the inverter's online monitoring platform and SunSpot for the impacted projects.

To further support property owners and solar contractors after their solar PV system is completed and interconnected, the SOMAH PA continues to promote [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

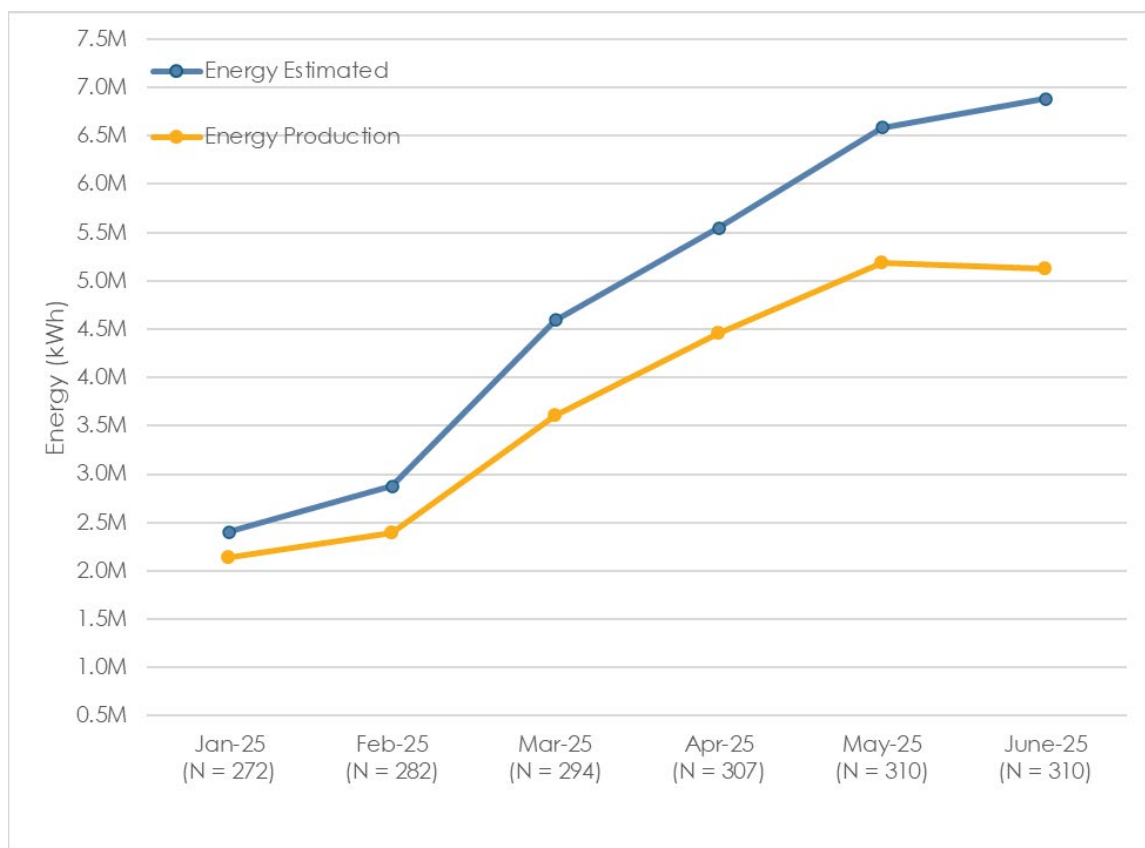


will continue to grow to cover additional inverter manufacturers that are installed through the program.

Fleet monitoring data at a glance for Q1-Q2 2025:

- 310 systems monitored
- 39.4 MW of capacity
- 22.9 GWh of production
- Percentage between production and estimate 87%
- Approximate emissions avoided based on MW capacity using EPA AVERT tool: 21,600 tons of CO<sub>2</sub>

**Figure 46 – 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 46. In addition to seasonality and equipment failure, some systems may experience a loss in communication, but not in system production. If systems experience equipment failures, the resulting warranty claims can often lead to long wait times to replace and/or repair



the failed equipment. In turn, extended system underperformance can occur until the equipment is replaced.

SunSpot can detect a wide range of production variations, from systems that have lost production entirely to systems with equipment issues that are now 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 47 – 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](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, no public forums were held due to a lack of substantial updates. The next public forum will take place in Q3 2025.



### 4.1.2 IOU Working Group

During the reporting period, the SOMAH PA held six IOU Working Group meetings. The Q1-Q2 2025 working group meetings focused on the following topics:

- January 2025 – General program and marketing coordination updates, tenant education hotline project updates, long-term IOU budget forecasting, CPUC Final Decision implementation syncs.
- February 2025 – General program and marketing coordination updates, tenant education hotline project updates, long-term IOU budget forecasting, CPUC Final Decision implementation syncs.
- March 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.
- April 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.
- May 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.
- June 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, expansion systems, website contacts, IOU staffing.

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. Since the last reporting period, four additional members have joined the SOMAH AC. Each of these new members was previously a



part of the SOMAH Job Training Organization (JTO) Task Force. The current cohort now has 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 meets virtually on a quarterly basis.

During this reporting period, the cohort had two meetings.

Q1 2025 meeting topics included:

- An update on the SOMAH PA's progress in implementing directives from D.24-11-006.
- An overview of SOMAH's CBO partnerships.
- A working session for SOMAH AC's working groups.

Q2 2025 meeting topics included:

- A general program update including updates on individual program areas.
- A report-out session for the SOMAH AC's working groups.
- An overview of Solar for All grants and potential program stacking opportunities for SOMAH projects.

#### 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.

In 2025, the SOMAH PA will continue action on ongoing recommendations aligning with the timelines outlined in the Response to Recommendations from the 2023 Triennial Evaluation. The SOMAH PA continues to work closely with ED to identify opportunities to incorporate key recommendations into the program's overall priorities and strategic efforts.

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. 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.

The SOMAH Ruling was issued on March 5, 2023, prompting replies and potential changes in various program areas. SB 355 resulted from the Ruling and was signed into law on October 7, 2023. The following program updates from SB 355 were implemented in Q1 2024 via the approved handbook (Handbook 8):

- Extended program period from 2030 through 2032.
- The term “building” was updated to the term “property” in the definition of “Qualified multifamily affordable housing property.”
- Eligibility Pathways:
  - Revision of the Income Eligibility Pathway to require at least 66% of the property residents to have incomes at or below 80% of the area median income (AMI).
  - Addition of a third eligibility pathway for properties owned by a California Native American tribe.
  - Addition of a fourth eligibility pathway for rental housing properties owned by a public housing authority or agency.

The remainder of program changes directed in SB 355, but not included in the current handbook, such as integration of new construction 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 will 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, which it intends to do in the successor proceeding as expeditiously as possible. As a recent 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 period is still open as of the close of this reporting period.





#### 4.2.1 Decision 24-11-006

A Proposed Decision was released on September 30, 2024, as an outcome of the March 2023 SOMAH Ruling. It includes 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 2025 ME&O Plan Budget Forecast, that equates to roughly \$32,000.

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 Liberty, PacifiCorp and 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.

At the end of this reporting period and leading into Q3 2025, the SOMAH PA is focusing on the implementation of D.24-11-006. 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, effective May 11, 2025.

The SOMAH PA is confident these measures will increase participation and support for Liberty and PacifiCorp projects and offer greater support for contractors. Although the tenant education requirement will be removed as of July 1, 2025, the SOMAH PA will continue to work toward and stay committed to fulfilling tenant education needs. 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. As directed by the Decision, the PA submitted an Advice Letter in Q2 2025 outlining the directed program changes in a forthcoming Handbook 9, which has subsequently been approved and is effective as of May 11, 2025. The SOMAH PA targets approval and implementation of Handbook 9 in Q3 2025.

#### 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 48 provides a non-exhaustive overview of the SOMAH Program Handbook since the inaugural edition, including major updates by version.

**Figure 48 – Handbook Versions**

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

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

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 extensive use of the Affordability Prescreen and high utilization of Technical Assistance and Support Services. Program directives from D.24-11-006 will 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 populations. The SOMAH PA is especially focused on wider engagement with tribal entities to increase applications and remove barriers to tribal project participation.

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 stakeholder expertise. The 2025 ME&O Plan focuses on conducting property owner outreach, developing relationships with tribes and tribal stakeholders, increasing contractor and subcontractor diversity, conducting in-person tenant education workshops, expanding job training eligibility through the HeatSpring SOMAH Academy and collaborating with energy efficiency partners. In the next reporting period, the ME&O Plan will focus on connecting with property owners, with an emphasis on program updates and integrated storage.

In the first half of 2025, the SOMAH PA celebrated a continued increase in project completion and greater use of progress payments. The SOMAH PA projects increasing numbers of new project entries in the second half of 2025 as a result 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 as projects reach completion through the end of 2025.

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 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*

- Cancelled: 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 cancelled status after 14 days.
- Unsubmitted: Applicant has started the application, but the information is incomplete and not fully submitted.