



Solar on Multifamily
Affordable Housing

2020 Marketing, Education & Outreach Plan



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About the 2020 SOMAH Marketing, Education & Outreach Plan

This marketing, education and outreach (ME&O) plan will guide activities by the SOMAH Program Administrator (PA) team to reach its target audiences and support the overall program goals for 2020 and beyond. This plan builds on the activities and learnings from the SOMAH launch and 2019 ME&O Plan, with updated strategies to address program gaps, challenges and opportunities to further achieve program goals.

About the SOMAH Program

The Solar on Multifamily Affordable Housing (SOMAH) program provides financial incentives for installing photovoltaic (PV) energy systems on multifamily affordable housing. SOMAH's overall target is to install 300 megawatts (MW) of generating capacity of qualified properties by 2030. Additionally, the program will deliver clean power and credits on energy bills to hundreds of thousands of California's affordable housing residents. SOMAH's community-based approach ensures long-term, direct economic benefits for tenants in low-income households, helps catalyze the market for solar on multifamily housing, creates local job training opportunities and supports local hiring.

The SOMAH program is administered by the SOMAH Program Administrator team¹, a team of nonprofit organizations that act as a single entity and provide a host of no-cost services to maximize community benefit and participation. Services include comprehensive technical assistance for property owners, tenant education resources and job training. An advisory council provides input into program development and helps ensure the program maximizes benefits to communities. See the [SOMAH Program Handbook](#) for more detailed information about the program and its requirements.

¹ The program administration team is comprised of the Association for Energy Affordability (AEA), the Center for Sustainable Energy (CSE), GRID Alternatives (GRID), and the California Housing Partnership, in addition to subcontracted organizations that include Rising Sun Energy Center and rotating community-based organizations.

SOMAH's program goals include:

- Install 300 MW of solar generating capacity on multifamily affordable housing statewide by December 31, 2030
- Provide direct economic benefits to tenants in the form of energy bill credits
- Promote economic development in disadvantaged communities² through increased job training opportunities and local hiring

The SOMAH 2020 Marketing, Education and Outreach (ME&O) Plan outlines objectives and tactics that continue to achieve SOMAH's program goals. In addition to maintaining a diverse and robust application pipeline, these strategies focus on ensuring geographically and demographically diverse participation from key SOMAH audiences — contractors, property owners and job trainees — while educating and engaging tenants about SOMAH's opportunities and benefits.

2019 Marketing, Education & Outreach in Review

This section provides an overview of the SOMAH PA's efforts in 2019 to launch the program, ensure a robust flow of applications and lay the foundation for geographically and demographically diverse property owner, contractor and job trainee participation for years to come. It provides an overview of the 2019 plan's objectives and activities, describes key takeaways and provides topline metrics.

Objective 1: Bring in an estimated 215 eligible applications to achieve 15 MW of installations

- 1.1 Announce program launch to contractor, housing and stakeholder audiences
- 1.2 Provide eligible contractors with the information and marketing resources needed to generate leads and submit applications
- 1.3 Engage in direct outreach to property owners with known solar interest

² For the SOMAH program, disadvantaged communities are defined as the 25% most disadvantaged census tracts on the CalEnviroScreen 3.0 and 22 census tracts that have the 5% highest pollution score but not socioeconomic data.

- 1.4 Conduct property owner webinars to review program application process, resources and requirements
- 1.5 Ensure ease of access to information and application processes by maintaining and optimizing CalSOMAH.org for all audiences

The SOMAH program surpassed targets for Objective 1 on opening day and has received more than **253 applications to install over 74 MW** of capacity to date. Building toward this strong opening, the SOMAH PA team announced the program's long-awaited launch date of July 1, 2019, on June 17, 2019, to all audiences via SOMAH's website, the CPUC service list and provided resources to contractors and property owners, including a map of eligible sites, application resources, webinars on program requirements and tools, and a full program website with specific user experiences variegated by user type.

Objective 2: Initiate long-term strategies for building and maintaining a multiyear pipeline of applicants

- 2.1 Educate diverse property owners across the state about SOMAH and its benefits
- 2.2 Engage four community-based organizations (CBOs) to do direct outreach and education in target communities, with a focus on small property owners and tenants
- 2.3 Coordinate marketing with existing programs that reach similar audiences
- 2.4 Engage local government agency staff to promote SOMAH in their jurisdictions
- 2.5 Conduct targeted outreach to property owners to offer portfolio reviews of SOMAH-eligible properties
- 2.6 Build a pipeline of diverse owners and projects with longer (2-10) year timelines

With a larger number of waitlisted vs. active applications to date, SOMAH has multiyear waitlists in three of five territories, by and large attributable to a high-volume of contractor-led applications addressing pent-up demand in the multifamily market segment, potentially due to the state's Multifamily Affordable Solar Housing (MASH) program's waitlists, submitted on day one of program launch, July 1, 2019.

Based on slowing application volume following opening week, the need to convert a significant proportion of eligible properties to applicants, and assuming lengthy processes for doing so for a significant proportion of engagements, the SOMAH PA developed and began implementing strategies to ensure a robust pipeline in future program years as planned. These efforts have included broad-based and individual outreach to property owners via

conferences and other events, webinars and one-on-one engagements by California Housing Partnership Corporation, including initial portfolio reviews and outreach to properties undergoing or planning rescindication; contracting with four community-based organizations (CBOs) with presence on the ground in major markets: Asian Pacific Environmental Network (APEN), California Environmental Justice Coalition (CEJA), Communities for a Better Environment (CBE) and Environmental Health Coalition (EHC); and co-marketing partnerships with similarly focused programs reaching SOMAH's target audiences.

Conferences attended include:

- Housing California (April 15-17, 2019)
- 40th Annual NPH Affordable Housing Conference (September 20, 2019)
- Solar Power International (September 23-26, 2019)
- Southern California Association of Nonprofit Housing Annual Conference (October 24-24, 2019)

In light of SOMAH's waitlists in Pacific Gas and Electric (PG&E), Southern California Edison (SCE) and San Diego Gas & Electric (SDG&E) service territories, the PA also began implementing tactics to reduce potential dropouts, including communicating expectations regarding waitlists and encouraging forward-looking planning on the part of contractors and property owners to address program requirements. One such resource is SOMAH's Energy Auditors Database, a contact list of energy audit providers who are certified to perform an energy efficiency walkthrough audit that complies with the SOMAH energy efficiency requirement.

Objective 3: Build and engage a robust and diverse contractor base

- 3.1 Promote SOMAH in media channels reaching contractor audiences
- 3.2 Promote SOMAH at solar industry conferences with high participation rates from California solar contractors
- 3.3 Conduct direct outreach to local contractors through CBO subcontractors
- 3.4 Conduct contractor eligibility trainings
- 3.5 Evaluate number and diversity of participating contractors and adjust marketing tactics accordingly

As of November 2019, 249 out of 253 SOMAH applications were submitted by just seven contractors, with no more than four contractors in any given utility territory. Fewer have active (vs. waitlisted) applications. Broadly speaking, these contractors were those most attuned to regulatory and prelaunch program developments or those with experience navigating similar programs, allowing them to apply soon after program launch.

Understanding that subcontractual relationships are normal and customary across the solar industry, the SOMAH PA will further invest in better understanding the host of businesses supporting primary contractor applicants as subcontractors, whether through installation, project engineering or finance roles, as a means for building a more complete picture of program contractor diversity or lack thereof. Meanwhile, the SOMAH PA has collected informal data on the prospective involvement of dozens of subcontractual relationships related to applications submitted by SOMAH's seven participating contractors in 2019.

Notwithstanding this initially small population of applicant contractors, the SOMAH PA has invested robustly in communicating the opportunity to a broad and diverse contractor base through communication partnerships with industry groups, contractor-focused conferences such as Solar Power International (September 23-26, 2019), six webinars and a public forum. As evidence of this effort, 154 eligible solar contractor companies and more than 220 licensed contractors have completed contractor eligibility training which will allow them to submit Track B applications themselves or to bid on Track A projects led by property owners. As provided in the plan, the SOMAH PA will engage contractors to understand any specific barriers to participation in order to design resources to build related capacity.

To date, contractor resources include an easy-to-use HTML program handbook, a comprehensive application guide and documentation checklist, SOMAH's virtual net energy metering (VNEM) toolkit, a map of potentially eligible properties across the state and a database of eligible SOMAH contractors based on location — a resource for property owners that makes contractors discoverable by location and service territories.

Objective 4: Ensure sufficient job trainee participation for projects to meet training requirements

- 4.1 Engage job training organizations (JTOs) in promoting SOMAH
- 4.2 Attend at least one solar industry or green building job fair to promote the program to JTOs in attendance and their students

- 4.3 Ensure trainees have the information and resources needed to successfully participate in SOMAH

The SOMAH PA launched its job training portal with the full program website on June 10, 2019, which allows contractors to meet program requirements by entering training opportunities at least 30 days in advance of project installation. The portal allows contractors to discover job training candidates via SOMAH's resume bank and lets trainees apply directly to posted training opportunities. The portal also includes eligible job training organizations, with which contractors may form bilateral partnerships. To date, SOMAH has confirmed the eligibility of approximately 60 JTOs across California and is actively vetting another 300 organizations. Through broad-based and specific outreach efforts, including five solar job fairs and JTO outreach emails, calls and site visits, SOMAH has built a bank of over 120 trainees ready to participate in installations or other project-related work.

To more holistically address the suite of training needs and opportunities geared toward strengthening California's solar workforce, the SOMAH PA's partnership with the Rising Sun Center for Opportunity will produce resources that will empower contractors to provide safe job training opportunities to local and targeted hires, including people of color and of low income, returning citizens, residents of multifamily affordable housing, women, veterans and other priority populations in line with emerging and best practices. These efforts will also support career attainment and growth and ensure program design and requirements are responsive to longer-term needs of California's solar industry. To do so, the SOMAH PA will launch a Job Training Organization (JTO) Task Force in 2020 with representatives from across California.

Objective 5: Educate tenants living in participating SOMAH properties about the program and how to maximize their benefits

- 5.1 Evaluate and optimize website content on CalSOMAH.org aimed at tenants. Monitor trends and continually optimize the site and materials to facilitate a clear user path and determine content additions and enhancements.
- 5.2 Evaluate and optimize tenant-facing materials provided to property owners for distribution to tenants under the tenant education requirement
- 5.3 Ensure participating property owners are prepared to comply with tenant education requirement
- 5.4 Prepare utility and other stakeholder customer service representatives to field/redirect SOMAH-related inquiries

- 5.5 Staff a multilingual tenant hotline to answer questions with pre-recorded messages and live support

In 2019, the SOMAH PA worked with investor-owned utility (IOU) representatives to complete the initial suite of tenant engagement materials in English, Spanish and Chinese. The materials included flyers and fact sheets on what to expect with SOMAH, how tenants' utility bills will change with IOU-specific information, tenant ESA programs by utility, simple energy efficiency tips, how solar works and how to apply for solar training opportunities related to installations where they live. This suite of materials will be extended to seven languages (six translations) by the close of 2019, including Tagalog, Vietnamese, Korean and Arabic, based on feedback from SOMAH PA's CBO partners, and will be launched on CalSOMAH.org as part of the website's refresh by end of Q1 2020.

The PA concurrently developed and released presentation materials for property owners who opt to hold tenant education workshops to meet SOMAH's tenant education requirements, including versions specific to each IOU.

The PA also launched SOMAH's tenant hotline (800-843-9728) that initially offers tenants assistance in English and Spanish. The SOMAH PA conferred with IOU representatives, particularly SCE, to coordinate tenant calls among the PA and IOUs based on subject matter, with the PA fielding SOMAH-specific calls and IOUs generally answering questions related to rates and bills.

The SOMAH PA also began planning its approach to evaluating the effectiveness of tenant engagement strategies, including SOMAH's tenant education materials and property owners' implementation of tenant engagement requirements, with a suite of surveys, targeted focus groups and interviews slated for Q1 or Q2 2020 implementation, pending a sufficient sample of installed and interconnected projects.

Objective 6: Ensure stakeholders are informed of and engaged with the program

- 6.1 Engage leading legislative and regulatory stakeholders in SOMAH launch
- 6.2 Create and distribute printable collateral including talking points, contact lists and program overviews for stakeholders to share internally
- 6.3 Engage state and local news media with success stories and interview opportunities highlighting SOMAH's positive social and economic impacts

- 6.4 Develop, evaluate and optimize targeted email communications to policymakers
- 6.5 Provide a kit of content and branded imagery to stakeholders to implement on their websites, blogs and social media channels
- 6.6 Develop, evaluate and optimize website content on CalSOMAH.org and CaliforniaDGStats.ca.gov aimed at stakeholders. Monitor trends and continually optimize the websites to facilitate a clear user path and determine content additions and enhancements
- 6.7 Secure speaking roles at conferences attended by policymakers

To announce SOMAH's long-anticipated launch, the SOMAH PA coordinated with the California Public Utilities Commission's News and Outreach Office, as well as the offices of Commissioner Martha Guzman Aceves and Assemblymember Susan Eggman, author of California Assembly Bill 693 that established SOMAH. Both the Commissioner and Assemblymember contributed quotes for SOMAH's launch announcement press release, which was shared widely with program stakeholder groups including industry associations, affordable housing groups, environmental justice organizations and other stakeholders.

The SOMAH PA also developed and released SOMAH-branded graphics and communication guidelines for eligible contractors and job training organizations to include in their promotional materials, developed stakeholder talking points, pitched stories to trade publications and fielded media inquiries.



Promotional graphics for SOMAH-eligible contractors and job training organizations

The SOMAH PA also has participated in a speaking engagement at the California Solar & Storage Association's (CALSSA's) "Solar & Storage Worker Lobby Day and Info Fair" in August 21, 2019 at the state Capitol to meet in person with lawmakers.

CalSOMAH.org email subscribers had nearly 33,000 email opens with a 70% click-through rate. Through earned media, SOMAH reach an estimated combined audience of 11 million, valued at \$230,000.

Finally, the SOMAH PA is continuing to monitor the user experience of CalSOMAH.org to ensure easy navigation and actionable information for each user type.

Key Program Audiences

SOMAH seeks to engage and support several distinct key audiences. Reaching these audiences requires understanding and speaking to their specific needs and recognizing that different audiences respond better to key messaging and tactics tailored to them — and coming from messengers that they trust.

Property owners and operators

Adding solar to an affordable housing property can be a complex and intimidating undertaking for financially strained and busy property owners. Engaging this audience requires direct outreach focused on the ease of participating in SOMAH, the benefits of the offering and the support provided through no-cost, upfront technical assistance resources (specifically Track A). Property owners get their information through professional associations, trade publications, conferences, community partners, traditional and social media, their peers and sales representatives (contractors).

Key marketing and education efforts to property owners will be centered around clarifying and promoting Upfront Technical Assistance — how it works and how to access it. The SOMAH PA will be increasing education and outreach on this offering, which is expected to boost participation.

Segments of this audience include:

- Affordable housing property owners and operators consisting of nonprofits, public housing authorities and for-profit entities
- Affordable housing associations and networks of nonprofit property owners/operators
- Government/nonprofit housing agencies that regulate deed-restricted, low-income multifamily rental housing

Challenges identified and lessons learned in 2019 around property owner engagement included:

- Multiple touch points are needed for owners to fully grasp the program's various aspects, which demands more of their busy schedule. Outreach planning needs to allow for a longer education process, especially when targeting owners with little to no experience with solar PV.
- The cost-benefit analysis of tenant PV is a challenge for some owners despite being interested in providing economic benefit to their tenants; while the tenant rate incentive is designed to cover 100% of the cost, the installation is not always cost neutral due to property circumstances and market conditions. In addition, operation and maintenance costs are the responsibility of the property owner. By clarifying and promoting upfront technical assistance owners can receive the information and support necessary to make informed decisions about the benefits of solar PV installations.
- While most HUD properties are now eligible, owners still face the barrier of not easily being able to obtain tenant utility data from IOUs to exclude SOMAH-solar credits as required by HUD. This will need to be addressed with the IOUs before the program sees significant participation from this sector.
- Until the SOMAH PA is able to secure an overarching policy, all United States Department of Agriculture (USDA)-owned property applications must include a letter from USDA attesting that the owner is able to exclude SOMAH solar credits from annual utility allowance calculations.
- Ongoing monitoring by the SOMAH PA of net energy metering (NEM) changes as well as programs by the Low-Income Housing Tax Credit (LIHTC) and the Self-Generation Incentive Program (SGIP) to ensure program alignment.

Solar contractors

Contractors are highly motivated to connect with property owners who want to participate in the program and may already be acting on their behalf. They need to be able to share the SOMAH story with different audiences. They need to access information about program eligibility, instructions on submitting applications, online bids and information about relevant program requirements. Additionally, they need access to tools and resources that help them promote the SOMAH program to specific audiences, i.e., property owners. They get information from trade press, trade associations, Google alerts and their peers at conferences and other gatherings. They are internet savvy.

Segments of this audience include:

- Solar companies or individual solar contractors
- Other types of contractors with or seeking to grow a solar business
- Solar subcontractors

Challenges identified and lessons learned in 2019 for engaging solar contractors included:

- The complexity surrounding installations on multifamily projects serves as a barrier to participating in the SOMAH program. Multifamily installations in the SOMAH program require a deep understanding of topics such as virtual net energy metering (VNEM), affordable housing and the IOUs' interconnection process. Additionally, SOMAH projects call for staff that are familiar with multifamily installations as well as access to financing sources to leverage until incentives are released. Due to the complicated nature of SOMAH projects, 2019 has resulted in limited diversity of contractors participating in the program.
- Often, contractors apply to the SOMAH program on behalf of their applicants. SOMAH has extensive program requirements that must be met in order to reserve incentive funding such as providing the correct documentation, fully executing application forms and meeting program deadlines. Contractors serving as applicants on behalf of their clients face a significant learning curve in navigating the application process.
- The number of new applications quickly stagnated after the initial burst, which may indicate that "low hanging fruit" has been exhausted. In addition, contractors may be reluctant to expend marketing resources for projects with long lead times caused by waitlist length in the major utility service territories.

Affordable housing residents/tenants

Tenants of multifamily affordable housing are culturally and linguistically diverse, have lower levels of educational attainment on average than their higher-income peers and often work one or more low-wage jobs. They have familiarity with government services but may be distrustful of programs they do not already interface with. They likely have little or no knowledge about solar energy. Access to the internet is often heavily mobile-dependent. This segment needs easy-to-understand, linguistically accessible information about the program and its benefits from a source they trust, whether that is a property manager or a local community organization. Key messaging will center around: solar and its cost-savings and environmental benefits, job training opportunities for tenants and their automatic eligibility and lower electricity bills at no cost.

Segments of this audience are:

- *SOMAH-eligible* tenants: housing residents who are interested in having SOMAH at their building
- SOMAH tenants: housing residents who live in a building that is participating in the SOMAH program

While tenant education and outreach were still in the planning stages in 2019, the SOMAH PA has been working closely with CBO partners to identify and account for foreseen and potential challenges and barriers expected to encounter as direct outreach efforts ramp up in 2020.

Challenges identified in 2019 and opportunities in engaging both SOMAH-eligible and SOMAH-participating tenants included:

- Property owners lack expertise in how to engage and educate tenants about SOMAH and require support. To address this, the SOMAH PA will be offering workshops in 2020 through its CBO partners that are aimed at educating tenants about SOMAH's benefits in the context of the solar and renewable energy field and providing property owners with the right tools and materials to successfully educate and inform tenants about the program.
- Contractors may fulfill the program's tenant education requirement for property owners
- The different waitlist statuses across the IOU territories are nuanced and potentially confusing, causing misunderstanding among tenants. Clarifying and setting

expectations about the waitlist and what it means for project timelines will be important for this audience in 2020 and beyond.

- Tenants lack readiness to take advantage of job training opportunities. The SOMAH PA will be addressing this in partnership with CBOs in 2020, working to support tenants' access to job training opportunities and connecting them with JTOs to make them more competitive candidates. Both tenant types (tenants of participating vs. eligible properties) require outreach focused on job training to ensure they are able to take advantage of SOMAH job training opportunities
- CBOs can help support tenant advocates by providing educational materials, messaging, and information about SOMAH's benefits (including job training opportunities) through workshops, newsletters, and other forms of outreach.

Job trainees and job training organizations

The job training audience consists of job training organizations (JTOs) that provide SOMAH-eligible solar training programs, students or participants from those programs and tenants of SOMAH properties who are also eligible to participate. This job training audience is focused primarily on economic opportunity. Job trainees, particularly those from disadvantaged communities (DACs) and low-income communities, may experience other barriers, such as lack of reliable transportation to and from job sites, lack of access to technology including the internet and digital platforms to learn about job opportunities and perception of social exclusion from and distrust of the solar industry that is predominantly characterized by white and wealthy communities.

Key messaging will center around paid training opportunities in the solar workforce, pathways to potential long-term employment and advancement in the solar workforce and access to career resources such as resume templates and a directory of eligible job training programs on the job portal.

Segments of this audience include:

- Eligible job trainees
- Tenants of SOMAH properties
- Job training organizations with SOMAH-eligible programs

Challenges identified and lessons learned in 2019 around engaging JTOs and trainees included:

- Initial JTO outreach has resulted in concentrated pockets of engaged JTOs (e.g., Bay Area and Los Angeles) that are not necessarily aligned with SOMAH project volume. The SOMAH PA will align outreach efforts with geographic locations of SOMAH projects in 2020.
- The short-term nature of SOMAH job training opportunities (40-80 hours) presents a challenge for job trainees who either currently hold or are seeking a full-time job. Additionally, the timing of these opportunities may not allow students currently enrolled in full-time training programs to participate until they have completed their training program. The SOMAH PA will address this barrier by messaging the career-advancing experience and long-term value that SOMAH job training opportunities provide. The SOMAH PA will also communicate installation start dates to job training organizations so they can prepare their students and participants for SOMAH jobs and align schedules.
- The SOMAH PA will expand JTO engagement by forming a [JTO Task Force](#) to ensure that job training organizations' voices and interests remain at the forefront of SOMAH's job training efforts and that trainees have a meaningful and career-advancing experience. This Task Force will be comprised of regionally diverse representatives from job training organizations across the state that include administrators, leaders, instructors, participants or alumni.
- The SOMAH PA will leverage its partnership with Rising Sun Center for Opportunity to support additional outreach to JTOs across the state and will produce public resources to share with JTOs and employers, including a solar training model and best practice guide for hiring disadvantaged workers.
- Work with CBOs to educate tenants living in potentially eligible properties about solar career pathways and empower tenants with local job readiness resources
- Hold job training webinars to provide contractors with tools and tips on how to recruit eligible trainees and provide a meaningful and robust job training experience

Stakeholders

The stakeholder group is a collection of audiences whose interests in SOMAH lie outside of submitting applications. Broadly, they are concerned with issues affecting their communities and are responsible for acting in the best interest of their constituents. In the case of utilities, including participating IOUs as well as community choice aggregators (CCAs), their interests may lie in helping their customers navigate the changes a SOMAH installation may bring to

their housing — both as a property owner and as a tenant. With audiences like local governments, interest in SOMAH may be motivated by the positive contribution a SOMAH project can have on climate action plan goals. In other audiences, such as state legislators and the California Public Utility Commission, interests are tied to the impact of the SOMAH program and how well it is being managed. In all cases, there may be opportunities to cross-promote SOMAH in conjunction with stakeholder programs targeted at the same audience.

From an ME&O perspective, the goal is to equip stakeholders with high-level program information and ensure that they know where to go for more detail and can refer a potential applicant to SOMAH. This audience needs talking points in addition to timely communication that details program milestones and changes.

Segments of this audience include:

- Utilities/IOUs/CCAs
- State government and legislative officials
- Local governments: e.g., City of San Diego, San Diego Association of Governments (SANDAG), Association of Bay Area Governments (ABAG)
- State agencies: e.g., California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA), The Business, Consumer Services and Housing Agency (BCSH), Department of Community Services and Development (CSD)
- Air districts: e.g., California Air Resources Board (CARB), Air Pollution Control Districts (APCD)
- California Public Utilities Commission (CPUC)
- CPUC regulatory stakeholders
- Community-based organizations (CBOs)

Challenges identified and lessons learned in 2019 for engaging stakeholders included:

- Effective communication to stakeholders requires case studies that focus on topics such as program achievements and benefits to tenants residing in SOMAH project sites. Data focused on the real-life applications of the program are not yet available as SOMAH projects are in the early phases of the application process. Case studies focused on the direct results of the PV system will not exist until projects begin development and receive interconnection. As SOMAH reaches the later phases of the

application process, communications to the stakeholder audience will include program data and project case studies.

- Tailoring key messaging about SOMAH to match the needs of stakeholders has proven to be challenging due to the widely varying interests of each segment of this audience. As the program progresses, stakeholder communications will require tailored messaging that aligns with each segment of the audience in order to effectively capture their attention.

Marketing channel overview by audience

Recognizing that some channels are more effective with certain target audiences than others, the following table indicates which channels will be used by the SOMAH PA to reach each target audience.

Channel	Property Owner	Tenant	Contractor	Job Seeker	JTO	Stakeholder
DIGITAL						
Website – CalSOMAH.org						
Digital display ads						
Email campaigns						
Social media - paid						
Social media - organic						
Webinars						
SEM						
Sponsored content						
PARTNER ENGAGEMENT						
Partner toolkit						
Channel	Property Owner	Tenant	Contractor	Job Seeker	JTO	Stakeholder

Partner backlinks						
Community-based organization outreach						
IN-PERSON/DIRECT OUTREACH						
Conferences, trade shows & job fairs						
Printable collateral						
Workshops & meetings						
Direct calls & direct emails						
Public forums						
MEDIA						
Community news media						
State news media						
Trade publications						

Market Analysis & Program Participation

The SOMAH PA conducted an initial market analysis in 2019, using the California Housing Partnership's database of multifamily affordable homes to identify key markets for SOMAH by geographic location — including IOU territories and disadvantaged communities (DACs) — and housing financing programs.

The market analysis for 2020 is in development and will build on 2019 methodology, adding additional layers of analysis that will serve to bolster ME&O efforts and strategies, mainly to help address gaps in current program participation. These include addressing gaps in geographic distribution among SOMAH's participating IOU territories and DACs across the state, and working with CBO partners to identify smaller eligible properties located in DACs across the state. As referenced in the *2019 Marketing, Education and Outreach in Review* section, the program saw high application volumes that generated waitlists in PG&E, SCE and SDG&E territories yet no applications were submitted from PacifiCorp and Liberty territories. Additionally, while currently 26.5% of active (non-waitlisted) applications are located in DACs, most applications are coming from the metropolitan regions of the Bay Area, Los Angeles and San Diego. As a result, areas such as the Central Valley and Los Angeles County, which have high concentrations of DACs, remain underserved. The SOMAH program is also looking to understand and address the high disparity between Track A and Track B application numbers, to create a more balanced Track A/Track B pipeline.

To better understand and address these gaps, the 2020 market analysis will include:

- Analysis of eligible owners across the state and in targeted regions, such as the Central Valley, to more thoroughly understand the profile of owners in this underserved area
- An in-depth look at property owner portfolio size ranges, specifically to identify small-portfolio and single-property owners who have limited staff capacity and for whom receiving upfront TA would make it most feasible for them to participate in SOMAH
- Identification of high concentrations of properties in DACs to more strategically target outreach efforts
- Analysis of the composition for some of the state's largest housing authorities, in order to tailor outreach efforts to these entities
- A projection of newly constructed properties in the LIHTC pipeline for next 2-3 years, to continue building a multiyear pipeline

Strategic Approach

The SOMAH program's approach to marketing, education and outreach centers around advancing equity and community benefits, awareness-to-adoption engagement and forming strategic partnerships and collaborations with groups that are already active and working with the key audiences and communities that SOMAH targets. These groups include CBOs, IOUs, trade organizations and state and local agencies.

Ensuring equity and community benefits

Low-income affordable housing residents, especially families of color, have historically lacked access to clean energy solutions while living in some of the state's most polluted neighborhoods. With a focus on multifamily affordable housing tenants in low-income and impacted, disadvantaged communities,³ SOMAH's goals are to generate local clean energy, reduce energy bills for families and provide paid workforce training opportunities to California's solar market.

According to a [National Renewable Energy Laboratory report](#), the technical potential of solar on all multifamily residential buildings in California is almost 14 gigawatts. SOMAH attempts to achieve this potential, by ensuring equitable solar access to multifamily affordable housing tenants across the state. Using insights from 2019 ME&O efforts and outcomes, our 2020 ME&O activities will continue to center around ensuring equitable outcomes across these objectives. These activities include:

- Developing targeted strategies and tactics that achieve a greater geographic diversity of projects — addressing geographic gaps across IOU territories and DACs
- Gaining better insight into the barriers to participate in SOMAH across SOMAH audiences (contractors, property owners, job trainees and tenants) and developing

³ For the SOMAH program, disadvantaged communities are defined as the 25% most disadvantaged census tracts on the CalEnviroScreen 3.0 and 22 census tracts that have the 5% highest pollution score but not socioeconomic data.

and implementing strategies that ensure geographically and demographically diverse participation from those audiences

- Working with CBOs to ensure that tenants living in potentially eligible properties are educated and informed about the benefits and opportunities they can access through SOMAH

Awareness-to-adoption engagement

The SOMAH PA employs an approach that aims to move people through the journey from awareness of the program to the adoption of it. Specifically, this implies engaging with audiences from the beginning — those who have never heard of SOMAH — right through to participating in the program, and all the touch points in between. All marketing will be developed to reach target audiences where they currently are in their journey by providing the right kind and amount of information needed to take their next step.

Strategic partnerships and collaborations

SOMAH is a multifaceted program that requires educating and engaging different audience types to achieve diverse participation. To do this successfully, the SOMAH PA will rely on partnerships with CBOs and coordination with IOUs and local/state agencies to strategically and effectively reach key audiences across the state.

Partnerships with CBOs and job training organizations (JTOs) will help the Program be transparent and accountable to the communities that the SOMAH program serves. Tenants and job trainees will be engaged by parties they trust and in ways that are culturally competent and account for their needs. To achieve these outcomes, the SOMAH PA is partnering with five CBOs that focus on environmental justice, tenants' rights and solar workforce development. These CBOs have built strong networks in communities across California and will add capacity and support in targeting outreach efforts to disadvantaged and underserved audiences. They will support 2020 ME&O objectives by:

- Providing expertise around the specific needs and challenges their communities face
- Continuing to provide guidance around tenant education materials ensuring they are culturally and linguistically relevant

- Conducting direct outreach across the state to help build a multiyear pipeline of projects that represent geographically diverse properties and to build a robust job trainee pool
- Conducting outreach to community networks to encourage engagement with SOMAH, including job training opportunities
- Supporting tenant education through property owner workshops
- Surveying tenants, job trainees and property owners to gather program feedback and adjust outreach tactics

In addition to direct CBO partnerships, the SOMAH PA will leverage the networks and marketing activities of related service providers and entities that manage and implement renewable energy and energy efficiency programs across the state. This includes exploring co-marketing opportunities with IOUs, solar and storage associations, nonprofits and other local/state agencies to both broaden and target SOMAH's outreach efforts. For example: promoting SOMAH Program benefits with other California Climate Investment programs such as the Clean Mobility Options for Disadvantaged Communities grant program from the California Air Resource Board. These co-marketing and coordination efforts will help broaden SOMAH's reach to new audiences and can help increase geographic diversity of participating properties as well as contractors.

Our 2020 activities also will involve coordination with government and legislative officials to identify and share local success stories that demonstrate the impact of SOMAH in individual communities. Stakeholders such as the CPUC, Energy Commission and other legislative committees also will play a role in promoting and sharing program impact.

Objectives and Tasks

SOMAH's 2020 ME&O Objectives

Applying the strategic approaches outlined above, along with insights and learnings from 2019 ME&O efforts, the objectives for 2020 are:

1. [Objective 1: Build and maintain a multiyear pipeline of diverse projects](#)

2. [Objective 2: Ensure an equitable distribution of projects across participating IOU territories and DACs across the state](#)
3. [Objective 3: Continue to build and engage a robust and diverse contractor base](#)
4. [Objective 4: Ensure sufficient job trainee participation for projects to meet training requirements](#)
5. [Objective 5: Educate SOMAH-eligible tenants and tenants living in participating SOMAH properties about the program and how to maximize their benefits](#)
6. [Objective 6: Ensure stakeholders are informed of and engaged with the program](#)

Objective 1: Build and maintain a multiyear pipeline of diverse projects

As the primary objective of the SOMAH program, this objective focuses on the need to attract property owners and contractors to submit applications for viable projects. Installing solar PV on multifamily affordable housing is a complex undertaking that requires long lead times, ample planning and a wealth of expertise — all potential barriers to multifamily affordable housing property owners.

Maintaining the pipeline: In 2019, the SOMAH program realized initial pent-up demand for Track B, contractor-led applications during the first week of launch. Of the 253 applications currently in the pipeline, only six were for Track A with the remainder for Track B. Approximately 230 applications were submitted in the first week of launch, with two dozen in the months since. While there is insufficient data to draw definite conclusions, the SOMAH PA has a working assumption that this initial pent-up demand will not be repeated in subsequent funding years as the contractors exhaust their existing customer base of large projects. If this assumption is realized, the theory is that the next 200 applications will likely be more challenging to acquire and may have smaller MW requirements.

Working with the understanding that a greater proportion of future applications will need to be property owner driven, activities related to achieving Objective 1 will center around reaching property owners and helping eliminate their barriers to solar PV installation by engaging them through the no-cost services offered in the Track A application stream.

Supporting overwhelmed owners: Keeping an eye on the long term 300 MW goal, in 2020, the SOMAH PA will target property owners who may not have heard of SOMAH, are not prepared to commit to a specific contractor or are overwhelmed by the process of installing solar. Directing property owners to Track A will help alleviate concerns about the technical complexity of the project by providing specialized technical assistance and can connect property owners with eligible contractors through the online bidding tool.

Reaching diverse owners: In addition to supporting more property owner participation in the SOMAH program, there are related program objectives that the SOMAH PA believes marketing Track A will help meet. Track A supports geographic diversity goals as it is designed in part to reach property owners in areas of IOU territories that the contractor market is not reaching. Further, by allowing multiple contractor bids on a single project, the online bidding tool via Track A can increase contractor diversity and participation, providing bids to some of the 200 eligible SOMAH contractors who do not have a current application.

Market development: A more balanced Track A/Track B pipeline can also provide potential market development and consumer protection benefits via competitive bidding. The multiple bidding process can help maintain SOMAH project costs closer to actual market costs by creating more competition within the sector. Further, having cost information when evaluating bids through Track A can ensure that property owners are able to access fair market prices.

A balanced approach: SOMAH program ME&O efforts will maintain a balanced approach between boosting engagement in undersubscribed territories and recognizing that long project lead times require outreach far in advance of when an application might be submitted. As a result, the SOMAH PA cannot neglect currently fully subscribed areas with large future potential. Specialized property owner engagement will be necessary in non-waitlisted IOU territories, Liberty and PacifiCorp. Due to smaller budgets in these territories, SOMAH funding is at risk of being exhausted by a single application, which could result in reduced program interest. Managing messaging and being very intentional in selecting properties outreached to will be key.

Another segment of this audience that will be targeted with a specialized approach is HUD property owners. The SOMAH PA will leverage recent requirement modifications that have increased SOMAH eligibility for HUD properties as a talking point to engage these property owners and encourage them to join the pipeline of eligible projects. In a similar vein, the SOMAH PA is engaging the USDA to secure an overarching policy to streamline the application process and increase eligibility for USDA-owned properties.

Following the theory that “your best customer is your current one,” the SOMAH PA will also focus on engaging waitlisted applicants to decrease the potential for application dropouts and discontent with wait times. Efforts will encourage proactive steps property owners can consider taking while waitlisted, such as roof or electrical upgrades and addressing energy efficiency requirements and opportunities, connecting them with existing no-cost energy efficiency programs such as the California Energy Savings Assistance Program (ESA) and the Low-Income Weatherization Program (LIWP).

SOMAH program partnerships with CBOs will help add capacity to SOMAH PA-led education and outreach activities under this objective, primarily through direct outreach to prospective property owners. Via community workshops and conferences, CBOs will distribute materials and content that increase community awareness of solar energy, energy efficiency-related topics and tenant education strategies.

Audiences

- Property owners: Applications to Track A
- Contractors: Applications to Track B
- Tenants: Advocacy to encourage property owners to apply to Track A (or B)

Activities

No.	Activity	Channels/tools	Audience(s)	Timeline (Qs)	Conversion Metric(s)	KPI(s)
1.1	Engage waitlisted applicants with the goal of minimizing attrition and maintaining a multiyear pipeline of applicants	<ul style="list-style-type: none"> Email Webinars 	<ul style="list-style-type: none"> Property owners Contractors 	Q1-Q4	Waitlist applicants remain on the waitlist	# emails sent # email opens # webinar registrants # webinar attendees % waitlist attrition % email click-throughs
1.2	Educate diverse property owners across the state about SOMAH, emphasizing Track A and its benefits through in-person approach	<ul style="list-style-type: none"> Workshops & meetings Conferences & tradeshow Track A-specific materials Webinars Direct phone outreach 	<ul style="list-style-type: none"> Property owners 	Q1-Q4	Property owners engage and participate in 1:1 outreach	# conversations # collateral distributed # email addresses collected # website visits # webinar attendees
1.3	Educate diverse property owners across the state about SOMAH, emphasizing Track A and its benefits through digital media approach	<ul style="list-style-type: none"> Email Social media Search engine marketing (SEM) 		Q1-Q4	Property owners click on digital media placements	# click-throughs from digital media

		<ul style="list-style-type: none"> Digital display ads Media placements Sponsored content 				
1.4	Work with community-based organizations (CBOs) ⁴ to provide direct marketing, education and outreach in target communities, with a focus on engaging property owners and eligible tenants	<ul style="list-style-type: none"> Phone calls In-person meetings Workshops for community members Educational materials 	<ul style="list-style-type: none"> Property owners Eligible tenants Community members and stakeholders 	Q1-Q4	Community members attend events	# of events # of attendees to events # of conversations
1.5	Coordinate marketing with existing programs that reach similar audiences	<ul style="list-style-type: none"> Workshops & meetings Partner toolkit 	<ul style="list-style-type: none"> IOUs 	Q1-Q4	Program administrators of related programs reference SOMAH and include CalSOMAH.org link	# programs that reference SOMAH # referred visits from other programs' digital channels to SOMAH website

⁴ CBO contracts are annual. In 2020 the SOMAH PA will develop a process for selecting future CBOs to participate based on identified gaps in program participation and other programmatic needs.

		<ul style="list-style-type: none"> Energy Savings Assistance (ESA) Program Energy Upgrade California Multifamily (EUC MF) Program Energy Efficiency Multifamily Finance Pilot Low-Income Weatherization Program (LIWP) Self-Generation Incentive Program (SGIP) 				
1.6	Conduct targeted outreach to newly eligible HUD properties	<ul style="list-style-type: none"> Direct phone outreach Email 	<ul style="list-style-type: none"> Property owners 	Q1-Q4	Owners of eligible HUD properties engage with SOMAH	# conversations
1.7	Engage government and legislative officials to promote SOMAH in their jurisdictions	<ul style="list-style-type: none"> Workshops & meetings 	<ul style="list-style-type: none"> Government and 	Q1-Q4	Legislative and government officials promote SOMAH in their jurisdictions	# conversations # distributed promotional materials # email addresses collected

		<ul style="list-style-type: none"> Webinars Partner toolkit 	legislative officials			# webinar attendees # toolkit downloads # website referrals from stakeholder shareables
1.8	Offer one-on-one program overview presentations and portfolio reviews of SOMAH-eligible properties to targeted property owners	<ul style="list-style-type: none"> Direct phone outreach Email 	<ul style="list-style-type: none"> Property owners 	Q1-Q4	Property owners participate in portfolio reviews	# one-on-one presentations # portfolio reviews # of new email addresses # of new contacts in property owner database
1.9	Create a process and tools for developing and maintaining a pipeline of diverse owners and projects with longer (2-10 year) timelines	<ul style="list-style-type: none"> Salesforce Workshops & meetings Conferences & tradeshow Webinars Direct phone outreach Email Social media Digital display ads 	<ul style="list-style-type: none"> Property owners Contractors 	Q1-Q4	Property owners sign up for SOMAH emails	# of new email addresses # of new contacts in property owner database

		<ul style="list-style-type: none"> Media placements 				
1.10	Conduct media outreach to targeted community news and statewide news outlets to showcase the success and benefits of SOMAH	<ul style="list-style-type: none"> Media - Community news & statewide news 	<ul style="list-style-type: none"> Tenants Property owners 	Q1-Q4	Media shares stories about SOMAH's benefits and success	# of published mentions reach of published mentions
1.11	Resource CBOs with media targets and sample materials (messaging and op-ed template) to reach tenants about the success and benefits of SOMAH	<ul style="list-style-type: none"> Media - Community news 	<ul style="list-style-type: none"> Tenants 	Q1-Q4	CBOs share benefits and success stories via targeted community news outlets	# of community news media hits attributed to CBO media targets
1.12	Build up property owner contact information for eligible properties for long-term outreach planning, continually refining owner database	<ul style="list-style-type: none"> Data tracking sheet Salesforce 	<ul style="list-style-type: none"> Property owners 	Q1-Q4	New property owners are added to database	# of property owner contacts % of known eligible property owners in database
1.13	Broaden SOMAH audience by adding new owners to SOMAH email lists	<ul style="list-style-type: none"> Email 	<ul style="list-style-type: none"> Property owners 	Q1-Q4	New property owners join SOMAH listserv	# of property owner opt-ins
1.14	Evaluate the impact of marketing on Track A applications	<ul style="list-style-type: none"> Data tracking via Google Analytics, database 	<ul style="list-style-type: none"> Owners Contractors 	Q1-Q4	Understand how marketing of Track A impacted Track A pipeline	# of Track A applications

1.15	Develop case studies targeted at owners to illustrate the benefits of SOMAH to property owners	<ul style="list-style-type: none"> Case studies 	<ul style="list-style-type: none"> Property owners 	Q1-Q4	Property owner case studies reach property owners	# of case studies produced # of owners reached # of case studies viewed/opened by property owners
1.16	Monitor NEM changes, LIHTC and SGIP program rules to ensure program alignment	<ul style="list-style-type: none"> SGIP, TCAC NEM 	<ul style="list-style-type: none"> Stakeholders Property owners 	Q1-Q4	SOMAH alignment with NEM changes, LIHTC and SGIP program development	# of programs tracked
1.17	Engage USDA to secure an overarching policy to streamline the application process	<ul style="list-style-type: none"> USDA 	<ul style="list-style-type: none"> USDA Stakeholders Property owners 	Q1-Q4	Application process and eligibility policy is streamlined for USDA properties	Creation of SOMAH-specific policy by USDA
1.18	Engage IOUs to ensure program participants are able to comply with the HUD guidance in excluding solar credits	<ul style="list-style-type: none"> IOUs 	<ul style="list-style-type: none"> IOUs Property owners 	Q1-Q4	Owners are able to obtain tenant utility data in format needed to comply with HUD requirements	# of HUD properties enrolled % of enrolled HUD properties versus total eligible HUD properties

Objective 2: Ensure an equitable distribution of projects across participating IOU territories and DACs across the state

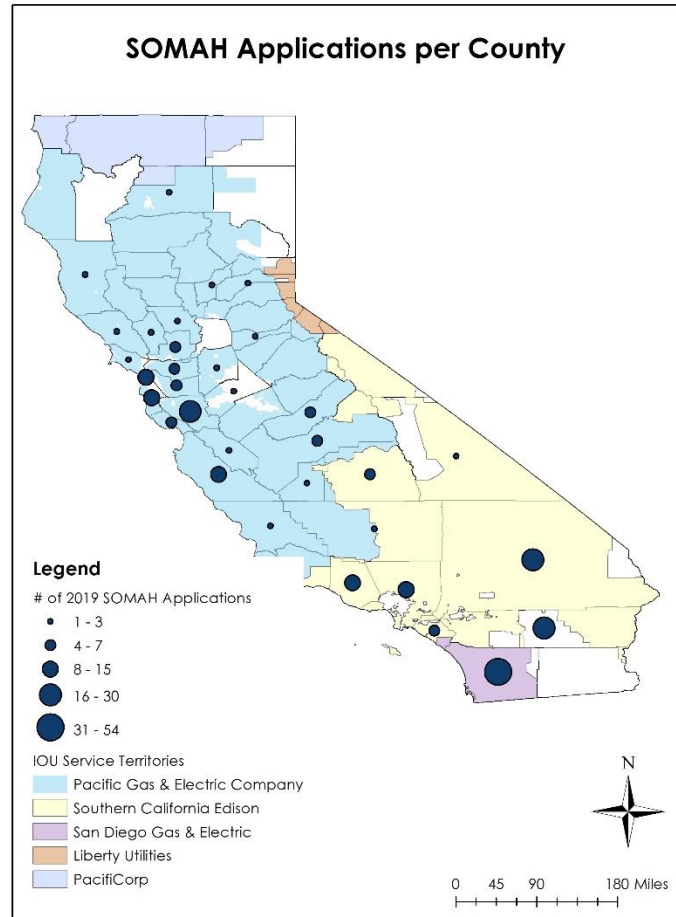
Central tenets of SOMAH include ensuring long-term, direct economic benefits for low-income households, creating clean energy jobs and catalyzing the market for solar on multifamily affordable housing. The SOMAH PA believes it's important that these benefits are realized by those who need them most and that they're equitably distributed throughout the state.

As of January 2020, 26.5% of active (non-waitlisted) applications are located in DACs across the three major IOU territories (SDG&E, SCE, and PG&E). Additionally, to-date, most applications come from the metropolitan regions of the Bay Area, Los Angeles and San Diego. As a result, areas such as the Central Valley and Los Angeles County, which have high concentrations of DACs, remain underserved.

In 2020, the SOMAH PA will focus outreach efforts on securing applications for projects in DACs. In particular, the SOMAH PA will prioritize outreach efforts aimed at increasing applications for projects in the Central Valley, DACs in metropolitan regions and Liberty and PacifiCorp territories.

The SOMAH PA will conduct analysis on the geographic distribution of projects in the application pipeline with the goal of determining gaps in equitable distribution and recognizing a desire for increased application concentration from properties in DACs. This analysis will be cross-referenced with the eligible properties map and will form the basis for prioritizing targeted outreach.

Map 1 notes the current distribution of applications in the pipeline and offers an initial high-level overview of geographic gaps.



Map 1: Geographic distribution of applications for SOMAH incentives

Audiences

- Property owners
- Contractors
- Tenants

Activities

No.	Activity	Channels/tools	Audience(s)	Timeline (Qs)	Conversion Metric(s)	KPI(s)
2.1	Assess geographic gaps in application density across IOU territories and DACs in relation to potential SOMAH eligible properties	<ul style="list-style-type: none"> CalSOMAH maps 	<ul style="list-style-type: none"> Property owners 	Q1-Q4	Geographic gaps in application density are identified	Analysis report with actionable property contacts # of potential eligible properties in DACs and gap IOUs
2.2	Work with CBO partners to conduct direct outreach to DAC communities; engage potentially eligible properties in DACs and other geographic gaps, about SOMAH and its benefits	<ul style="list-style-type: none"> Phone calls In-person meetings Workshops Door-to-door outreach Educational materials 	<ul style="list-style-type: none"> Property owners Eligible tenants 	Q1-Q4	Materials are developed and disseminated in DAC communities Community members attend events in DACs Property owners in DACs apply to SOMAH via Track A	# of phone calls # of events (i.e. workshops) # of attendees at events # of applications in DACs and gap IOUs Geographic spread of properties # of properties reached in DACs
2.3	Conduct targeted outreach to smaller portfolio property owners less likely to participate in affordable housing conferences	<ul style="list-style-type: none"> Market analysis Direct phone outreach Email 	<ul style="list-style-type: none"> Property owners 	Q1-Q4	Smaller property owners engage and participate in 1:1 outreach Smaller property owners apply to SOMAH	# of small and single-property owners reached # of unresponsive property owners

2.4	Participate in rural housing conferences to reach smaller/rural property owners	<ul style="list-style-type: none"> California Coalition of Rural Housing (CCHR) San Joaquin Valley Collaborative 	<ul style="list-style-type: none"> Property owners 	Q3-Q4	Rural housing conferences attended	# of rural housing conferences attended # conversations # collateral distributed # email addresses collected
2.5	Collaborate with local stakeholders and partners for co-marketing opportunities	<ul style="list-style-type: none"> Market analysis Direct phone outreach Email Co-marketing collateral 	<ul style="list-style-type: none"> Stakeholders 	Q1-Q4	Program administrators of related programs/organizations reference SOMAH and include CalSOMAH.org link	# of engaged stakeholders and partners # stakeholder and partner materials that reference SOMAH/drive to website # referred visits from partners' digital channels to SOMAH website
2.6	Identify barriers to entry/participation for smaller property owners	<ul style="list-style-type: none"> Surveys One-on-one discussions Email feedback Public forums 	<ul style="list-style-type: none"> Property owners 	Q1-Q4	Property owners engage in providing feedback	# survey respondents # one-on-one discussions # comments at public forums
2.7	Develop tactics to address barriers to entry/participation for smaller property owners	<ul style="list-style-type: none"> Webinars 	<ul style="list-style-type: none"> Property owners 	Q1-Q4; Q4 for user paths	Property owners use tools developed	# webinar participants # marketing material downloads

		<ul style="list-style-type: none"> ▪ CalSOMAH.org property owner page ▪ Marketing materials ▪ Public forums 				# of visits to contractor page on website Path through website after contractor page
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Objective 3: Continue to build and engage a robust and diverse contractor base

Through a number of tactics enacted in 2019, the SOMAH PA effectively recruited 154 distinct contractors for its eligible contractors list. Obtaining further data on the geographic and demographic characteristics of these eligible contractors and conducting an analysis will be a priority for 2020 as the SOMAH PA hopes to gain insight into why despite having a large list of eligible contractors, only seven have submitted applications to date.

It's possible the seven contractors with submitted applications will be unable to submit further applications due to resourcing constraints given their current pipeline of projects. It's also probable they will require regional subcontractors to complete their projects. The SOMAH PA is collecting information in the Power Clerk application process on subcontractors used for each project, to better capture and understand involvement of both primary and subcontractors in the SOMAH program. In keeping with the SOMAH PA's understanding around pent-up demand and how quickly future funding cycles will be exhausted (as mentioned in the narrative for Objective 1), the SOMAH PA will be gathering additional data from contractors to help understand what barriers prevented a greater diversity of contractor applicants. The complexity of completing a multifamily solar PV project could be a primary obstacle; and for this reason, the SOMAH PA's priority for Objective 3 will be to support contractors and begin to alleviate these challenges.

From a marketing, education and outreach perspective, such support could take the form of putting formal tools in place to connect applicant contractors with eligible subcontractors familiar with SOMAH who express an interest in subcontracting. It also entails promoting the lead-generation benefits of the bidding tool and the need for the SOMAH PA to attract property owners through this portal.

Another important factor in 2020 will be to ensure currently eligible contractors without submitted applications remain engaged and are not discouraged by the current waitlist. In order to avoid eligible contractor attrition, it will be crucial to engage with contractors through various channels, provide education, hear their concerns and share the SOMAH PA's commitment to reducing their barriers to applying. Bringing additional interested parties on board will remain an active strategy but will take a back seat to serving already eligible contractors.



Educating all parties about available tools, ensuring diversity of contractors in the bidding tool and providing access to resources that help contractors navigate barriers will all be central to the SOMAH PA's 2020 strategy to maintain and build a diverse contractor base.

Audience

- Contractors

Activities

No.	Activity	Channels/tools	Audience(s)	Timeline (Qs)	Conversion Metric(s)	KPI(s)
3.1	Identify barriers to entry/participation for smaller contractors	<ul style="list-style-type: none"> Surveys One-on-one discussions Email feedback Public forums 	<ul style="list-style-type: none"> Contractors 	Q1-Q4	Contractors engage in providing feedback	# survey respondents % of responses # one-on-one discussions # comments at public forums
3.2	Develop tactics to address barriers to entry/participation for smaller contractors	<ul style="list-style-type: none"> Webinars CalSOMAH.org contractor page Marketing materials Public forums 	<ul style="list-style-type: none"> Contractors 	Q1-Q4; Q4 for user paths	Contractors use developed tools	# webinar participants # marketing material downloads # of visits to contractor page on website Path through website after contractor page
3.3	Engage with eligible SOMAH contractors to maintain contractor pool and eligibility status	<ul style="list-style-type: none"> Webinars Contractor database Conferences & trade shows Emails 	<ul style="list-style-type: none"> Contractors 	Q1-Q4	Contractors remain on eligible contractors list	# eligible contractors # contractors with applications

3.4	Promote lead-generation potential of bidding tool	<ul style="list-style-type: none"> ■ Emails ■ Workshops ■ Webinars 	<ul style="list-style-type: none"> ■ Contractors 	Q1-Q4	Contractors participate in the online bidding tool process	# bid requests # bid proposals # contractors in bidding tool
3.5	Build out online platforms and resources to support contractor participation	<ul style="list-style-type: none"> ■ CalSOMAH.org 	<ul style="list-style-type: none"> ■ Contractors 	Q1-Q4	Contractors access and download online resources	# website visits to contractor-targeted pages # contractor tool downloads # referrals to CalSOMAH.org from contractor channels
3.6	Promote SOMAH in social media channels reaching contractor audiences	<ul style="list-style-type: none"> ■ Facebook ■ LinkedIn ■ YouTube 	<ul style="list-style-type: none"> ■ Contractors 	Q1-Q4	Contractor clicks on social media post/video	# mentions # users reached # of website visits tracked to social media posts
3.7	Promote SOMAH at solar industry conferences and speaking engagements with high participation rates from California solar contractors	<ul style="list-style-type: none"> ■ Conferences and trade shows ■ Solar Power International ■ Intersolar 	<ul style="list-style-type: none"> ■ Contractors 	Q1-Q4	Audience members interact with SOMAH staff member	# unique conversations # collected email addresses # distributed promotional materials # webinar/training registrations

		<ul style="list-style-type: none"> CALSSA meetings 				# attendees to speaking engagements
3.8	Conduct Contractor Eligibility Trainings	<ul style="list-style-type: none"> LinkedIn Email Trade media Local media 	<ul style="list-style-type: none"> Contractors 	Q1-Q4	Contractors become SOMAH eligible	# webinar/training registrations # eligible contractors from targeted areas
3.9	Evaluate number and diversity of participating subcontractors for better insight/accuracy in contractor diversity and composition.	<ul style="list-style-type: none"> Application database Contractor Intake Form 	<ul style="list-style-type: none"> Contractors 	Q1-Q4	Ways to track subcontractor numbers and composition	# subcontractors # minority owned businesses # women owned businesses Subcontractor operating range
3.10	Develop contractor-subcontractor connection tool	<ul style="list-style-type: none"> CalSOMAH.org 	<ul style="list-style-type: none"> Contractors 	Q1-Q4	Contractors use the connection tool	# connections made # participating contractors
3.11	Pitch media on participating contractor interviews & case studies	<ul style="list-style-type: none"> Media - statewide, community news & trade publications 	<ul style="list-style-type: none"> Contractors 	Q1-Q4	Media writes stories spotlighting SOMAH contractors	# of media mentions # unique visitors/month (UVM) per media mention

Objective 4: Ensure sufficient job trainee participation for projects to meet training requirements

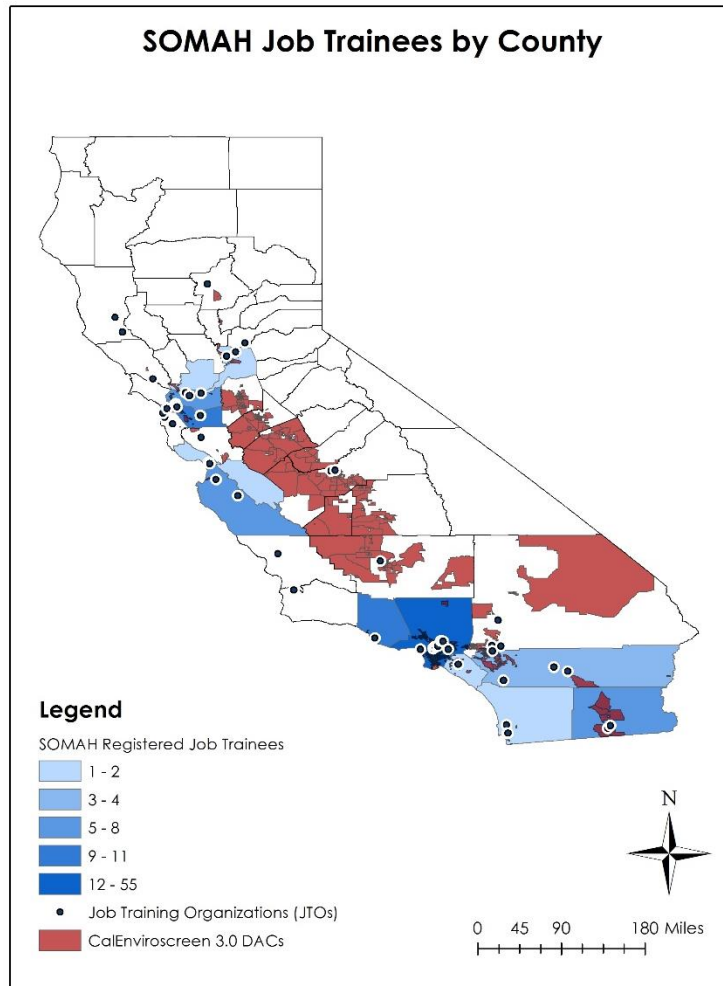
SOMAH job training opportunities are a significant benefit of the program and provide career-advancing experiences for job trainees and tenants of SOMAH properties. In 2019 the SOMAH PA focused on building out a list of eligible job training programs, engaging job training organizations (JTOs) in the program and providing tools to educate their trainees and get eligible trainees into the job training portal to start connecting with contractors.

Initial program outreach was well received by JTOs across the state. Many JTOs see these opportunities as extremely valuable and are excited to connect their students and participants to paid training opportunities that connect classroom knowledge to real solar installation projects. As of November 2019, the JTO directory of eligible programs includes 59 eligible organizations across the state; and there are over 100 eligible trainees in the resume bank. Map 2 shows the geographic distribution of SOMAH registered job trainees and job training organizations across the state. Due to the limited number of projects that have begun solar installation, the SOMAH PA has not collected data on job success.

In 2020, the SOMAH PA will focus on building the base of eligible trainees in areas with concentrations of SOMAH projects, identifying and addressing barriers for contractors in engaging trainees and for tenant participation and continuing to build a robust network of engaged job training organizations.

Rising Sun Center for Opportunity (Rising Sun) and the CBO subcontractors will support the PA's outreach and education efforts.

Map 2: Geographic distribution of SOMAH registered job trainees and JTOs



Job training organizations: Direct outreach to JTOs will be conducted by the SOMAH PA and Rising Sun. Outreach will be targeted to JTOs in areas with a high volume of SOMAH projects and will focus on:

- Promoting SOMAH job training opportunities to their students and participants
- Preparing their students for SOMAH opportunities through relevant curricula and soft-skill development (e.g., resume and interview assistance)
- Applying classroom instruction to on-the-job training
- Facilitating requests from contractors to recruit their students/participants

Additionally, Rising Sun will create a solar training model to be shared with JTOs that are interested in developing or enhancing a solar training program.

Job trainees: The SOMAH PA will educate prospective job trainees on SOMAH job training opportunities through job fairs, presentations, JTOs and relevant workforce development partners and programs. The SOMAH PA will also develop and provide resources such as resume templates, job search strategies and solar career resources to prepare job trainees for a successful experience.

Tenants: The SOMAH PA will ensure that the trainee pipeline will admit tenants by working with the CBOs to educate and prepare tenants with solar career and local job readiness resources. The SOMAH PA and CBOs will encourage property owners to promote tenant job training opportunities through the tenant education materials.

Contractor engagement: The SOMAH PA will work with contractors who currently have projects in the pipeline to understand their recruitment needs and hiring barriers and connect them to appropriate JTOs and job trainees. The SOMAH PA will hold trainings/webinars to provide contractors with tools and tips on how to recruit eligible trainees and provide a meaningful and robust job training experience. Contractors will also have access to the job portal, resume bank and directory of eligible organizations. The SOMAH PA will collect contractor feedback on job training experiences through surveys to gauge if they are offering permanent positions to SOMAH trainees. Rising Sun will develop a solar training model and best practice resources for hiring disadvantaged workers to share with solar contractors and employers.

Audiences

- JTOs/job trainees
- Property owners
- Contractors

Activities

No.	Activity	Channels/tools	Audience(s)	Timeline (Qs)	Conversion Metric(s)	KPI(s)
4.1	Evaluate job trainee experience and identify barriers to participation	<ul style="list-style-type: none"> Surveys Focus groups JTO Task Force 	<ul style="list-style-type: none"> Job trainees JTOs 	Q1-Q4	Job trainees engage in providing feedback	# of survey responses % of responses # of focus group participants
4.2	Regionally target eligible trainees and JTOs in areas where there are approved SOMAH projects	<ul style="list-style-type: none"> Direct calls & emails to JTOs Webinars Job fairs Trainee presentations CBO partner outreach 	<ul style="list-style-type: none"> JTOs Job trainees 	Q1-Q4	Trainees in SOMAH project areas sign up on job portal	# eligible JTOs on directory <i>by county</i> vs. <i>baseline (total number of JTOs)</i> # job trainees on portal <i>by county</i> # webinar registrants # webinar attendees # interactions at job fairs # presentation attendees
4.3	Coordinate marketing with existing programs that have green job or renewable energy job training pathways	<ul style="list-style-type: none"> Email Coordination meetings 	<ul style="list-style-type: none"> Job trainees 	Q1-Q4	Program administrators of green/renewable job training programs reference SOMAH and include CalSOMAH.org link	# of programs that reference SOMAH # referred visits from green/renewable job training program digital channels to SOMAH website

4.4	Engage and educate contractors on job training requirements and facilitate trainee hiring	<ul style="list-style-type: none"> Contractor job training requirements webpage Webinars/workshops Job training portal Directory of SOMAH-eligible JTOs Solar training and hiring resources 	<ul style="list-style-type: none"> Contractors 	Q1, Q3	Contractors use tools and resources to understand job trainee requirements	# page visits # webinar registrants # webinar attendees # jobs posted on portal # resource/toolkit downloads
4.5	Work with CBO partners to educate and engage tenants living in potentially eligible properties and property owners around job training opportunities for eligible tenants	<ul style="list-style-type: none"> Workshops Newsletters Email blasts Printed flyers Job trainee webpage Educational resources 	<ul style="list-style-type: none"> Property owners Potentially eligible tenants SOMAH tenants Contractors 	Q1-Q4	Materials are developed and disseminated to property owners and tenants Property owners and tenants attend workshops	# workshops # property owners who attended workshops # tenants that attended workshops # tenants signed up for job portal # page visits # of resource/template downloads

		(resume templates, local JTO directory, job readiness programs)				
4.6	Engage job training organizations (JTOs) in promoting SOMAH	<ul style="list-style-type: none"> Direct calls & emails to JTOs Webinars Email & social media shareables Printed flyers JTO Task Force 	<ul style="list-style-type: none"> JTOs 	Q1-Q4	JTOs reference SOMAH and include CalSOMAH.org links JTOs join CalSOMAH.org	# eligible JTOs on directory # webinar registrants # webinar attendees # social media mentions # media/flyer downloads # JTO email sign ups # referred visits from JTO digital channels to SOMAH website
4.7	Attend at least one solar industry or green building job fair to promote the program to JTOs in attendance and their students	<ul style="list-style-type: none"> Job fairs 	<ul style="list-style-type: none"> JTOs Job trainees 	Q1-Q4	Job fairs attended	# interactions # of job portal sign ups attributed to job fair
4.8	Create and distribute resources to ensure trainees can successfully participate in SOMAH	<ul style="list-style-type: none"> Job training portal Trainee guide/checklist 	<ul style="list-style-type: none"> Job trainees JTOs 	Q1-Q4	Eligible trainees use resources	# job trainees on portal # downloads of guide/checklist # downloads of templates # page visits

		<ul style="list-style-type: none"> Resume templates Job search and interview tips Workshops 				# trainees/JTOs attended workshops
4.9	Elevate job training success stories in community news media to reach prospective trainees and JTOs and highlight success of program	<ul style="list-style-type: none"> Media 	<ul style="list-style-type: none"> Job seekers 	Q4	Media shares stories about SOMAH's job training benefits and success	# published mentions Reach of published mentions

Objective 5: Educate *SOMAH-eligible tenants* and *tenants living in participating SOMAH* properties about the program and how to maximize their benefits

Tenant benefits continue to be a central pillar of the SOMAH program. The primary objective of tenant education is to ensure potentially eligible tenants and tenants living in buildings participating in SOMAH are aware of and able to benefit from SOMAH in an equitable manner. This means providing and communicating culturally and linguistically relevant information about the benefits of SOMAH, while also encouraging a holistic understanding about access to clean energy in California.

Due to the limited number of projects that have begun solar installation, the SOMAH PA has not initiated tenant education surveys to evaluate the overall impact and relevance of the tenant education materials the SOMAH PA began deploying in 2019. The SOMAH PA has, however, received feedback from the four CBO subcontractors who highlighted among other things additional languages needed for the SOMAH-approved tenant education materials. In addition, the SOMAH PA identified two tenant types: tenants living in potentially eligible properties and tenants living in participating SOMAH buildings. This distinction is important because the marketing, outreach and education to each subset audience will be conducted by different parties and the educational focus will vary.

In 2020, the SOMAH PA's strategies will focus on providing more targeted support to:

- Potentially eligible tenants – housing residents who would like to advocate for SOMAH at their building
- Tenants participating in SOMAH – housing residents who live in participating SOMAH buildings
- Property owners and contractors – parties who are responsible for conducting tenant education

Potentially eligible tenants: Education and outreach to tenants of potentially SOMAH-eligible properties will be conducted by CBOs with the guidance and support of the SOMAH PA. CBOs will develop a culturally and linguistically relevant curriculum of educational activities focused on: environmental justice concepts and renewable energy basics, information about what makes a property eligible for SOMAH, SOMAH's direct and indirect benefits to tenants and

property owners (utility bill savings, job training opportunities and ESA enrollment) and information about other job training and energy efficiency programs that tenants can access beyond SOMAH. Direct outreach activities will support tenants who want to advocate for SOMAH to work with local CBOs to engage property owners, encouraging enrollment into the SOMAH program.

SOMAH tenants: The PA's efforts in 2020 will focus on ensuring that tenants have the resources needed to understand relevant program details, including construction timeline and impact on tenant utility bills, and have their questions answered. Strategies will include assessing effectiveness of materials and optimizing them, as well as resourcing property owners and contractors for SOMAH projects to effectively deliver the educational materials.

Property owners and contractors: Property owners and, in some cases, contractors conduct direct outreach to tenants living in buildings receiving SOMAH. In addition to direct support for property owners around tenant engagement through CalSOMAH.org and webinars, the SOMAH PA will collaborate with CBO subcontractors to develop and deploy a train-the-trainer curriculum to help property owners and contractors effectively and equitably reach tenants.

Audiences

- Potentially eligible tenants
- Tenants participating in SOMAH
- Property owners
- Contractors

Activities

No.	Activity	Channels/tools	Audience(s)	Timeline (Qs)	Conversion Metric(s)	KPI(s)
5.1	Work with CBO partners to educate and engage potentially eligible tenants about SOMAH's benefits, including job training opportunities	<ul style="list-style-type: none"> Workshops Newsletters Email blasts 	<ul style="list-style-type: none"> Potentially eligible SOMAH Tenants 	Q1-Q3	Potentially eligible tenants attend CBO events	# of community events # of multifamily potentially eligible tenants at events
5.2	Educate participating property owners about tenant engagement, and prepare them to comply with tenant education requirements	<ul style="list-style-type: none"> Workshops Newsletters Email blasts 	<ul style="list-style-type: none"> Property owners 	Q1-Q4	Property owners attend workshops and use resources	# of monthly page views and downloads of resources # of property owners/managers who use tenant engagement toolkit (survey based)
5.3	Work with CBOs to educate property owners on how to inform tenants about program benefits and job training opportunities	<ul style="list-style-type: none"> Workshops Newsletters Email blasts 	<ul style="list-style-type: none"> Property owners 	Q2-Q4	Property owners attend workshops on how to educate/inform tenants	# of workshops # of property owners who attend workshops # of post-workshop survey responses
5.4	Engage and inform contractors about tenant job training opportunities	<ul style="list-style-type: none"> Job training portal Email blasts Webinars 	<ul style="list-style-type: none"> Contractors 	Q2-Q4	Contractors attend webinars and access resources to learn about tenant job training opportunities	# of contractors that attend job training webinar # of jobs posted

5.5	Identify barriers/challenges for tenants in participating in job trainee opportunities	<ul style="list-style-type: none"> ■ Survey ■ Interviews ■ Focus groups 	<ul style="list-style-type: none"> ■ Tenants in SOMAH buildings 	Q3-Q4	Barriers to tenants participating in job opportunities are identified	# of (and %) tenant responses to: survey interviews focus groups
5.6	Facilitate workshops to encourage tenant participation in job trainee opportunities	<ul style="list-style-type: none"> ■ Workshops ■ Flyers ■ Emails 	<ul style="list-style-type: none"> ■ Tenants in SOMAH buildings 	Q3-Q4	Eligible tenants attend job training workshops	# of tenants in job portal # of tenants who attend workshops
5.7	Coordinate with existing (IOU) programs that market and outreach to tenants about energy savings/assistance programs and job training opportunities	<ul style="list-style-type: none"> ■ Emails ■ Coordination meetings 	<ul style="list-style-type: none"> ■ Tenants in SOMAH buildings 	Q1-Q4	Tenants learn about IOU energy saving/assistant programs and related job training opportunities	# of programs shared with tenants # of tenants who enroll in energy savings/assistance programs # of tenants who take advantage of job training opportunities
5.8	Evaluate and optimize website content on CalSOMAH.org aimed at tenants; monitor trends and continually optimize the site and materials to facilitate a clear user path and determine content additions and enhancements	<ul style="list-style-type: none"> ■ CalSOMAH website 	<ul style="list-style-type: none"> ■ Tenants in SOMAH buildings 	Q1-Q4; Q4 for user paths	Tenants are able to navigate CalSOMAH.org website	# of monthly page views # return visits Path through website (what order pages are viewed in)

5.9	Evaluate and optimize tenant-facing materials provided to property owners for distribution to tenants under the tenant education requirement	<ul style="list-style-type: none"> Print materials: Simple ways to save energy What to expect with SOMAH? How will your bill change? Get paid to install solar on your building How solar energy works Solar installation timeline 	<ul style="list-style-type: none"> Tenants in SOMAH buildings Property owners CBOs IOUs 	Q3-Q4	Tenants understand what to expect from SOMAH and how they will be impacted	# of tenants reporting acceptable level of understanding of SOMAH and how it benefits them (survey-based) # of tenants reporting that SOMAH educational material was relevant and useful (focus-groups)
5.10	Prepare IOU and other stakeholder customer service representatives to field/redirect SOMAH-related inquiries	<ul style="list-style-type: none"> Coordination meetings Emails 	<ul style="list-style-type: none"> IOUs 	Q1-Q4	IOUs and stakeholders are able to direct customers to proper tenant service	# of utility representatives who receive resources Satisfaction of utility partners that their staff are informed (survey-based) # and types of inquiries handed off to SOMAH staff

5.11	Staff and optimize multilingual tenant hotline to answer questions with prerecorded messages and live support	<ul style="list-style-type: none"> ■ SOMAH tenant material ■ CalSOMAH website ■ Tenant workshops 	<ul style="list-style-type: none"> ■ Tenants in SOMAH buildings 	Q1-Q4	Tenants use SOMAH hotline SOMAH hotline addresses tenant inquiries	# of calls received # of calls satisfied by pre-recorded message Response rate for messages received # of repeat calls with unresolved issues
5.12	Collect narrative-based stories centered around tenants benefiting from SOMAH and share via targeted media and social media outlets	<ul style="list-style-type: none"> ■ Media ■ Social media ■ Website 	<ul style="list-style-type: none"> ■ Interested public ■ Stakeholders ■ Tenants ■ Property owners 	Q1-Q4	Media shares SOMAH's impact and success stories	# of media placements # of views - online and via social media Total reach of media placements

Objective 6: Ensure stakeholders are informed of and engaged with the program

While stakeholders are not expected to participate in SOMAH applications, they are valuable partners when it comes to helping build program awareness, and this objective aims to solidify this informal partnership. Many stakeholders have a vested interest in SOMAH's success, and for some, SOMAH may be beneficial for their constituents/customers. Having reliable access to current program information enables stakeholders to provide a high service level.

In 2019, employed tactics focused on engaging with those who were already familiar with SOMAH. This included communications through our email list as well as regular meetings that included a monthly IOU working group for the SOMAH PA and IOU program leads.

In 2020 the SOMAH PA is expanding its tactics to reach new audiences who have minimal familiarity with SOMAH to educate them about how it can benefit their communities.

The SOMAH PA will primarily reach stakeholders through established communications channels like email and trade publications and by participating in environmental advisory boards, such as the South Coast Air Quality Management District's Environmental Justice Community Partnerships Advisory Council. The SOMAH PA will augment this outreach with targeted webinars, exhibitions and speaking engagements at conferences and trade shows and pitching SOMAH success stories to media for coverage.

Audiences

- Utilities/IOUs/CCAs
- State government and legislative officials
- Local governments: e.g., City of San Diego, San Diego Association of Governments (SANDAG), Association of Bay Area Governments (ABAG)
- State agencies: e.g., California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA), The Business, Consumer Services and Housing Agency (BCSH), Department of Community Services and Development (CSD)
- Air districts: e.g., California Air Resources Board (CARB), Air Pollution Control Districts (APCD)
- California Public Utilities Commission (CPUC)

Activities

No.	Activity	Channels/tools	Audience(s)	Timeline (Qs)	Conversion Metric(s)	KPI(s)
6.1	Create and distribute internal content kits with talking points, who-to-contact and program overview presentations for stakeholders to share internally	<ul style="list-style-type: none"> Digital/print material Presentations 	<ul style="list-style-type: none"> Stakeholders Funders 	Q1-Q4	Stakeholders receive content kits	# distributed content kits
6.2	Engage state and local news media with success stories and interview opportunities highlighting SOMAH's positive social and economic impacts	<ul style="list-style-type: none"> Media: statewide news, community news Trade publications 	<ul style="list-style-type: none"> Stakeholders 	Q1-Q4	Media shares SOMAH's impact and success stories via local and state news outlets	# media placements Total reach of media placements
6.3	Develop, evaluate and optimize targeted email communications to stakeholders	<ul style="list-style-type: none"> Email 	<ul style="list-style-type: none"> Stakeholders 	Q1-Q4	Stakeholders read email communications	# emails sent # emails opened Click-through rate
6.4	Provide a kit or content and branded imagery to stakeholders to implement on their website, blog and social media channels	<ul style="list-style-type: none"> Stakeholder toolkit 	<ul style="list-style-type: none"> Stakeholders 	Q1-Q4	Stakeholders publish SOMAH info on their platforms	# content kits distributed # Referrals to CalSOMAH.org
6.5	Develop, evaluate and optimize website content on CalSOMAH.org and CaliforniaDGStats.ca.gov aimed at stakeholders, including "Impact" pages	<ul style="list-style-type: none"> CalSOMAH website CaliforniaDGStats website 	<ul style="list-style-type: none"> Stakeholders 	Q1-Q4; Q4 for user path	Stakeholders visit and are able to navigate to relevant content on CalSOMAH.org and CaliforniaDGStats.ca.gov	# page visits # return visits time spent on pages Path through website (what order pages are viewed in)

6.6	Secure speaking roles at events stakeholders attend	<ul style="list-style-type: none"> Conferences & trade shows Networking events 	<ul style="list-style-type: none"> Stakeholders 	Q1-Q4	Stakeholders interact with staff at events	# speaking roles # collateral distributed
6.7	Develop a SOMAH community impact page	<ul style="list-style-type: none"> CalSOMAH website Social media 	<ul style="list-style-type: none"> Stakeholders Legislators Community members 	Q1-Q4	Stakeholders visit impact page	# of page views

Evaluation and Reporting

Since SOMAH's launch in July 2019, the SOMAH PA has been collecting data on the key performance indicators (KPIs) and metrics outlined in the 2019 ME&O Plan to form a program baseline. Key KPI outcomes have been highlighted in the *2019 Marketing, Education and Outreach in Review* section of this plan. Over the course of 2020, the SOMAH PA will continue to review, update and finalize KPIs across ME&O objectives and program areas — seeing where there are information gaps and to gain better insights about the program's progress. In addition to 2019 KPIs, we're also focusing on the following:

- Tracking total number of owner entities and portfolio size ranges as an indicator of owner diversity
- Tracking total number of applications needed to reach megawatt goal
- Tracking contractor *and* subcontractor geographic and demographic information (number of employees, number of solar installations, minority-owned businesses, women-owned business, languages offered) and project size data against market analysis to identify gaps in participation
- Tracking eligible job trainee geographic and demographic data on eligible job trainees against project locations to identify gaps in participation
- Developing targets and budgets by strategy and objective to determine the most cost-effective strategies

In addition to quantitative assessments of KPIs and metrics, the SOMAH program uses stakeholder engagement opportunities to assess program impact, gaps and challenges. In 2020, surveys for tenants, job trainees, contractors and property owners are being developed and disseminated in order to understand barriers to entry, reasons for dropout at different points and overall satisfaction with their experience and SOMAH's services. These surveys and their methodology will be standardized but will account for different outreach needs and approaches of each target audience.

In addition to these surveys, the SOMAH PA will continue to gather feedback through workshops and quarterly public forums to improve upon our ME&O approaches and the SOMAH program overall. The SOMAH Advisory Council will also continue to provide guidance and oversight of the program's implementation, which includes ME&O strategies. Together, feedback and input from our key audiences, stakeholders and advisors will help inform and modify our ME&O efforts to ensure our approach is successful in reaching the audiences and communities SOMAH was designed to serve.



Finally, beginning in 2020, the SOMAH program will be evaluated by an independent third-party evaluator selected by the CPUC. The SOMAH PA sees this as an informative layer of evaluation that will assist in assessing the success of the program's ME&O efforts and provide insight by recommending any program modifications that may ultimately help better inform ME&O strategies across multiple program years.

Appendix: Budget by Month and Category

2020 SOMAH ME&O Plan Budget (Forecast)

Total Labor, 2020

Total Labor	\$ 2,051,579
Total Non-Labor	\$ 576,719
Grand Total	\$ 2,628,298

Q1 2020

Category	Subtask	January		February		March	
		Labor	Non-Labor	Labor	Non-Labor	Labor	Non-Labor
Marketing and Outreach	ME&O Admin	\$ 20,422	\$ -	\$ 23,705	\$ -	\$ 27,517	\$ -
Marketing and Outreach	Website Development & Enhancements	\$ 28,684	\$ 1,300	\$ 5,637	\$ 100	\$ 6,131	\$ 100
Marketing and Outreach	Community Based Organization	\$ 13,500	\$ 526	\$ 17,615	\$ 1,065	\$ 18,915	\$ 149,801
Marketing and Outreach	Cooperative Marketing Efforts	\$ 14,460	\$ 300	\$ 14,394	\$ 300	\$ 14,863	\$ 300
Marketing and Outreach	Conferences	\$ 1,345	\$ 3,000	\$ 10,243	\$ 1,000	\$ 2,095	\$ 3,600
Marketing and Outreach	Tenant Engagement	\$ 13,477	\$ 500	\$ 13,369	\$ -	\$ 12,306	\$ 1,000
Marketing and Outreach	Property Owner Engagement	\$ 24,950	\$ 1,300	\$ 32,521	\$ 1,300	\$ 34,145	\$ 1,300
Marketing and Outreach	Contractor Engagement	\$ 14,466	\$ 950	\$ 14,466	\$ 950	\$ 14,466	\$ 950
Marketing and Outreach	Contractor Training	\$ 8,384	\$ -	\$ 8,384	\$ -	\$ 8,384	\$ -
Marketing and Outreach	Marketing Collateral Development	\$ 4,309	\$ 1,500	\$ 3,567	\$ -	\$ 4,309	\$ 2,000
Marketing and Outreach	Communications	\$ 5,319	\$ -	\$ 5,319	\$ -	\$ 5,319	\$ -
Marketing and Outreach	Media	\$ 4,300	\$ -	\$ 5,289	\$ -	\$ 4,300	\$ -
Marketing and Outreach	ME&O Plan Development	\$ 6,798	\$ -	\$ 4,612	\$ -	\$ -	\$ -
Workforce Development	Cooperative Marketing Efforts	\$ 3,651	\$ -	\$ 1,095	\$ -	\$ 3,651	\$ -
Totals		\$ 164,064	\$ 9,376	\$ 151,215	\$ 4,715	\$ 156,400	\$ 159,051
Q1 Total		\$ 644,821					



Q2 2020

Category	Subtask	April		May		June	
		Labor	Non-Labor	Labor	Non-Labor	Labor	Non-Labor
Marketing and Outreach	ME&O Admin	\$ 28,009	\$ -	\$ 29,872	\$ -	\$ 25,946	\$ -
Marketing and Outreach	Website Development & Enhancements	\$ 6,873	\$ 1,300	\$ 28,778	\$ 100	\$ 6,230	\$ 100
Marketing and Outreach	Community Based Organization	\$ 20,349	\$ 688	\$ 14,974	\$ 1,065	\$ 21,702	\$ 149,801
Marketing and Outreach	Cooperative Marketing Efforts	\$ 14,460	\$ 300	\$ 14,394	\$ 300	\$ 14,267	\$ 300
Marketing and Outreach	Conferences	\$ 20,904	\$ 2,266	\$ 904	\$ 3,000	\$ 6,796	\$ 750
Marketing and Outreach	Tenant Engagement	\$ 12,306	\$ -	\$ 16,386	\$ -	\$ 14,193	\$ 500
Marketing and Outreach	Property Owner Engagement	\$ 30,992	\$ 1,300	\$ 35,498	\$ 1,300	\$ 36,391	\$ 1,300
Marketing and Outreach	Contractor Engagement	\$ 14,466	\$ 950	\$ 14,466	\$ 950	\$ 14,466	\$ 950
Marketing and Outreach	Contractor Training	\$ 8,384	\$ -	\$ 8,384	\$ -	\$ 8,384	\$ -
Marketing and Outreach	Marketing Collateral Development	\$ 4,309	\$ -	\$ 4,497	\$ -	\$ 4,507	\$ 1,000
Marketing and Outreach	Communications	\$ 5,396	\$ -	\$ 5,532	\$ -	\$ 5,544	\$ -
Marketing and Outreach	Media	\$ 4,823	\$ -	\$ 4,675	\$ -	\$ 4,695	\$ -
Marketing and Outreach	ME&O Plan Development	\$ -	\$ -	\$ 8,090	\$ -	\$ -	\$ -
Workforce Development	Cooperative Marketing Efforts	\$ 3,651	\$ -	\$ 4,345	\$ -	\$ 4,381	\$ -
Totals		\$ 174,921	\$ 6,804	\$ 190,794	\$ 6,715	\$ 167,501	\$ 154,701
Q2 Total		\$ 701, 436					



Q3 2020

Category	Subtask	July		August		September	
		Labor	Non-Labor	Labor	Non-Labor	Labor	Non-Labor
Marketing and Outreach	ME&O Admin	\$ 23,830	\$ -	\$ 25,788	\$ -	\$ 25,971	\$ -
Marketing and Outreach	Website Development & Enhancements	\$ 6,957	\$ 100	\$ 6,166	\$ 100	\$ 6,180	\$ 100
Marketing and Outreach	Community Based Organization	\$ 23,654	\$ 688	\$ 14,463	\$ 1,065	\$ 14,715	\$ 101,000
Marketing and Outreach	Cooperative Marketing Efforts	\$ 14,163	\$ 300	\$ 14,163	\$ 300	\$ 14,163	\$ 300
Marketing and Outreach	Conferences	\$ 11,158	\$ 3,000	\$ 10,971	\$ 2,000	\$ 13,418	\$ 5,000
Marketing and Outreach	Tenant Engagement	\$ 13,910	\$ -	\$ 15,112	\$ -	\$ 14,538	\$ 500
Marketing and Outreach	Property Owner Engagement	\$ 29,490	\$ 1,300	\$ 33,406	\$ 1,300	\$ 31,023	\$ 1,300
Marketing and Outreach	Contractor Engagement	\$ 14,466	\$ 950	\$ 14,466	\$ 650	\$ 14,466	\$ 650
Marketing and Outreach	Contractor Training	\$ 8,384	\$ -	\$ 8,384	\$ -	\$ 8,384	\$ -
Marketing and Outreach	Marketing Collateral Development	\$ 4,477	\$ 500	\$ 4,378	\$ -	\$ 4,408	\$ 1,000
Marketing and Outreach	Communications	\$ 5,510	\$ -	\$ 5,398	\$ -	\$ 5,431	\$ -
Marketing and Outreach	Media	\$ 4,636	\$ -	\$ 4,438	\$ -	\$ 4,498	\$ -
Marketing and Outreach	ME&O Plan Development	\$ -	\$ -	\$ 23,085	\$ -	\$ 23,289	\$ -
Workforce Development	Cooperative Marketing Efforts	\$ 4,272	\$ -	\$ 3,907	\$ -	\$ 4,016	\$ -
Totals		\$ 164,906	\$ 6,838	\$ 184,123	\$ 5,415	\$ 184,499	\$ 109,850
Q3 Total		\$ 655,631					

Q4 2020

Category	Subtask	October		November		December	
		Labor	Non-Labor	Labor	Non-Labor	Labor	Non-Labor
Marketing and Outreach	ME&O Admin	\$ 23,319	\$ -	\$ 30,063	\$ -	\$ 24,743	\$ -
Marketing and Outreach	Website Development & Enhancements	\$ 6,918	\$ 100	\$ 5,637	\$ 1,300	\$ 6,121	\$ 100
Marketing and Outreach	Community Based Organization	\$ 16,505	\$ 688	\$ 21,382	\$ 1,065	\$ 12,648	\$ 100,000
Marketing and Outreach	Cooperative Marketing Efforts	\$ 14,482	\$ 300	\$ 14,163	\$ 300	\$ 14,163	\$ 300
Marketing and Outreach	Conferences	\$ 7,718	\$ 1,215	\$ 10,893	\$ 1,536	\$ 662	\$ -
Marketing and Outreach	Tenant Engagement	\$ 14,432	\$ -	\$ 15,771	\$ -	\$ 13,264	\$ -
Marketing and Outreach	Property Owner Engagement	\$ 19,392	\$ 1,300	\$ 27,655	\$ 1,300	\$ 31,290	\$ 1,300
Marketing and Outreach	Contractor Engagement	\$ 14,466	\$ 650	\$ 14,466	\$ 650	\$ 14,466	\$ 650
Marketing and Outreach	Contractor Training	\$ 8,384	\$ -	\$ 8,384	\$ -	\$ 8,384	\$ -
Marketing and Outreach	Marketing Collateral Development	\$ 4,398	\$ -	\$ 3,629	\$ -	\$ 4,289	\$ 500
Marketing and Outreach	Communications	\$ 5,420	\$ -	\$ 5,600	\$ -	\$ 5,297	\$ -
Marketing and Outreach	Media	\$ 4,478	\$ -	\$ 6,030	\$ -	\$ 4,260	\$ -
Marketing and Outreach	ME&O Plan Development	\$ 29,935	\$ -	\$ 24,465	\$ -	\$ 6,662	\$ -
Workforce Development	Cooperative Marketing Efforts	\$ 3,980	\$ -	\$ 1,369	\$ -	\$ 3,578	\$ -
Totals		\$ 173,825	\$ 4,253	\$ 189,505	\$ 6,151	\$ 149,827	\$ 102,850
Q4 Total		\$ 626,411					