



Solar on Multifamily
Affordable Housing

2021 Marketing, Education & Outreach Plan

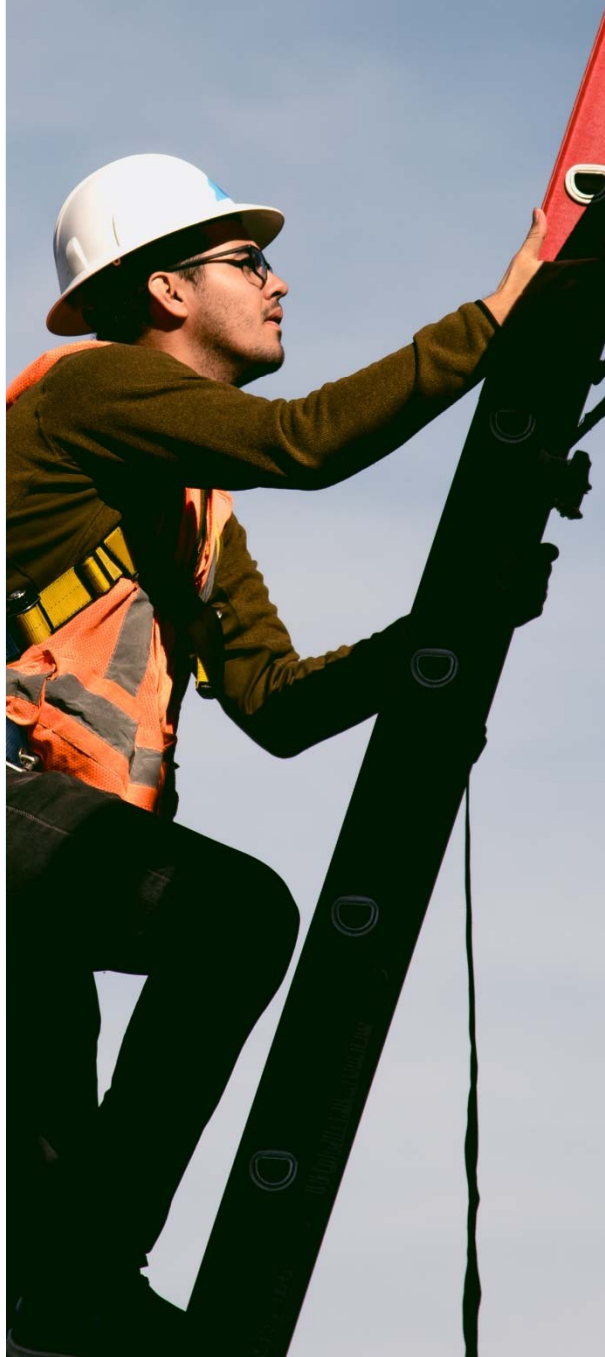


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About the 2021 SOMAH Marketing, Education & Outreach Plan

This marketing, education and outreach (ME&O) plan will guide activities by the Solar on Multifamily Affordable Housing (SOMAH) Program Administrator (PA) team to reach its target audiences and support the overall program goals for the 2021 calendar year. This plan builds off of the SOMAH Launch and 2020 ME&O Plan, with updated strategies to address program gaps and opportunities, program evaluation findings, and to achieve program goals.

SOMAH Program Overview

The SOMAH program, launched on July 1, 2019, provides financial incentives for installing solar photovoltaic (PV) energy systems on multifamily affordable housing. SOMAH's overarching goals include:

- Expanding access to solar generation and its benefits to low-income customers in multifamily housing, where it is typically limited
- Install 300 MW of solar generating capacity on multifamily affordable housing statewide by December 31, 2030
- Provide direct financial benefits to tenants in the form of energy bill credits
- Promote local economic development in underserved communities through solar job training opportunities and local hiring
- Providing greater accessibility to the program through a single point of contact, full service technical assistance, and coordination with other low-income programs

The SOMAH program is administered by the SOMAH PA¹, a team of nonprofit organizations that act as a single entity and provide a host of no-cost services to maximize community

¹ The program administrator team comprises 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.



benefit and participation. Services include comprehensive technical assistance for property owners, tenant education resources and job training. An advisory council and job training organization task force provide input into program development and ensure the program maximizes benefits to the communities it serves. See the [SOMAH Program Handbook](#) for more detailed information about the program and its requirements.

The SOMAH 2020 Marketing, Education and Outreach (ME&O) Plan outlines strategies, objectives and tactics that drive the program toward achieving its goals. In addition to fostering a robust pipeline of program applications, the ME&O strategies focus on prioritizing DAC participation and ensuring geographically and demographically diverse participation from SOMAH audiences — contractors, property owners and job trainees — while educating and engaging tenants about SOMAH’s opportunities and benefits.

2020 Marketing, Education & Outreach in Review

The year 2020 was full of unexpected events: a global health pandemic, a resurgence of pivotal civil rights movements and an unprecedented wildfire season across the Western United States. These events have had (and continue to have) impacts across the SOMAH program and have required the SOMAH PA to pivot its ME&O tactics. The SOMAH PA adapted its messaging and communications methods with its audiences, being mindful of and responsive to their shifting attentions, priorities and needs: messaging about the SOMAH program in ways that acknowledged the limited bandwidth and capacity of low-income communities, property owners, contractors and job training organizations and their students, while continuing to promote the benefits of SOMAH as supporting a larger resilience and recovery strategy.

The SOMAH PA made temporary adjustments to program requirements and compiled health and safety resources which were shared via a dedicated webpage, CalSOMAH.org/COVID19, which the PA continues to maintain. Finally, the SOMAH PA had to adapt **how** outreach was conducted, and beginning in March 2020, shifted all in-person outreach to be fully remote, in response to COVID-19 and shelter-in-place safety measures.

Below we provide a more detailed review of our 2020 ME&O activities by objective.

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

Applications overview

Despite the challenging events of 2020, the SOMAH program received more than 159² new applications, projecting 6.5 MW of solar, or 2.2%³ of the program's 300 MW goal, with most of those applications coming from nonprofit owners. A further breakdown of project types is below:

Housing Type	# of applications submitted
Non-profit owners	150
For-profit owners	2
Local Housing Authority	7
Total	159

The drop-out/cancellation rate for applications was also low in 2020, at 5%, despite the pandemic, and new 2020 incentive funds for Pacific Gas & Electric (PG&E), Southern California Edison (SCE) and San Diego Gas & Electric (SDG&E) territories allowed the SOMAH PA to clear the application waitlists for these territories. In August 2020, an influx of applications for SDG&E resulted in a new waitlist.

To increase applicant diversity in 2021, the SOMAH PA will be using marketing and outreach tactics that include: conducting outreach to owners with properties in disadvantaged communities (DACs)⁴, developing an understanding of the Tribal Entity ownership structure, and identifying and partnering with key industry associations to expand the program's reach.

Outreach & engagement

Despite the impacts of COVID-19 on property owner priorities, the SOMAH PA was able to reach a total of 187 owners via online webinars resulting in 66 additional property owners to

² Includes cancelled and waitlisted applications, four (4) Track A projects and 155 Track B projects

³ Projected MW based on 52 applications that have met program milestone: Reservation Request Approval

⁴ 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



the SOMAH mailing list. Throughout the year, SOMAH webinars focused on providing a comprehensive overview of the program with an emphasis on upfront technical assistance (Track A), an overview of the program's energy efficiency benefits and resources, and guidance on construction safety during COVID-19. Compared to the 2019 program year, webinar attendance for the property owner audience increased by 35%, bringing the average attendance rate 62%. The SOMAH PA will continue to build upon the property owner webinar series and identify new mechanisms to reach owners to ensure that the property owner audience remains engaged with the program.

Co-marketed events

The SOMAH PA coordinated with a variety of affordable housing associations and committees to capture a larger audience of property owners throughout California

Southern California Association of Nonprofit Housing (SCANPH): Hosted *Clean Energy Resources for COVID-19 Response* webinar that garnered 40 attendees. Promoted the Property owner survey featured in SCANPH newsletter.

Emerging Leaders Peer Network (ELPN) + Non-Profit Housing Association of Northern California (NPH): Hosted *Clean Energy Resources for Healthy Affordable Housing* webinar that had 31 attendees.

Affordable Housing Management Association (AHMA): Now provide SOMAH program information accessible on the association webpage

Housing Opportunities Made Easier (HOME): Participated in a breakout session focused on housing affordability in Ventura County that garnered 35 attendees.

California Coalition of Rural Housing (CCRH): Hosted a co-marketed GREEN Talk that garnered eight (8) property owner attendees. Co-marketed SOMAH's Property Owner Webinar Series

Additionally, in June 2020 the SOMAH PA was able to secure an overarching policy for USDA Rural Development financed properties to streamline their participation and eligibility in the SOMAH program. This update, in conjunction with the HUD eligibility memo from July 2019,



has so far resulted in nine HUD financed projects and two USDA financed projects participating in the SOMAH program.

Property owner survey results

The COVID-19 pandemic in 2020 added unforeseen challenges and barriers. Anecdotally, property owners had limited capacity to engage in conversations about SOMAH, while focusing on crisis response issues like delayed rents, and implementing safety protocols. Because of this, the SOMAH PA has been gathering information via surveys in order to be responsive to both timely and longer-term challenges owners may face. This work will not only continue into 2021 but will be a priority for the program. Key survey takeaways to-date include:

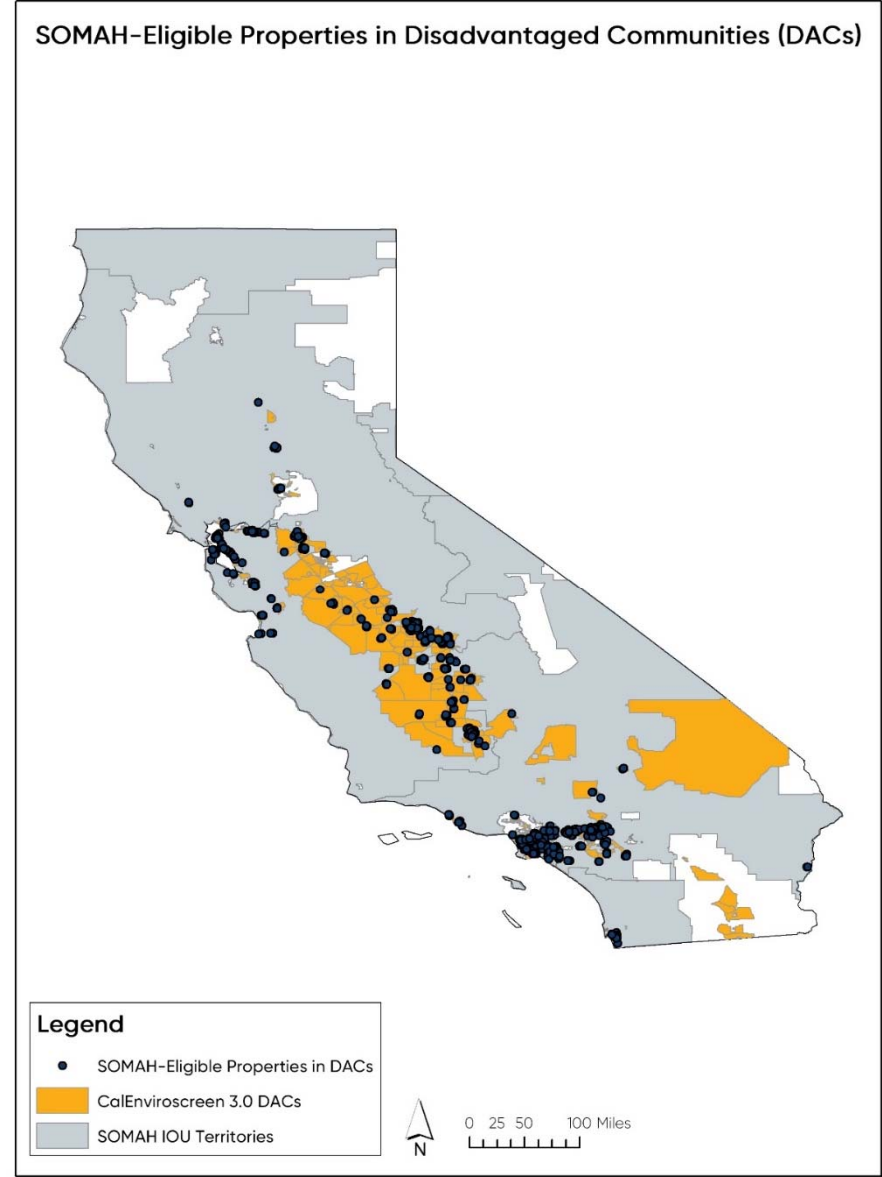
- Owners in the SOMAH email subscriber list expressed interest in receiving more instructional materials about the application process, as well as information explaining how solar can be more financially viable for their properties.
- Owners not currently in the SOMAH email subscriber list indicated a high level of interest (n=91%) in pursuing solar PV for their multifamily affordable housing properties. Additionally, 91% of the survey respondents indicated that at least one of their properties included solar PV.
- Furthermore, survey respondents were required to read a few lines about the benefits of participation in the SOMAH program and indicate their overall interest. After learning about the potential benefits of SOMAH, a vast majority of owners (91%) showed interest in the program.

In 2021, the SOMAH PA will expand marketing efforts to capture a larger pool of owner responses for future iterations of these surveys, using targeted reminder emails, personalized follow-up emails, and direct outreach via phone. For more information about SOMAH's completed and planned surveys, please refer to the [Semi-Annual Progress Report](#) for the June – December 2020 reporting period, Section 3.2.

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

The SOMAH PA's marketing efforts have resulted in active applications in all participating IOU territories. The majority of new applications in 2020 were in PG&E and SCE territories, with application density continuing to be highest for the Bay Area, Los Angeles, and San Diego metropolitan areas.

Map 1: Active SOMAH application density and location across California



Map 2: Geographic distribution of SOMAH-eligible properties in DACs

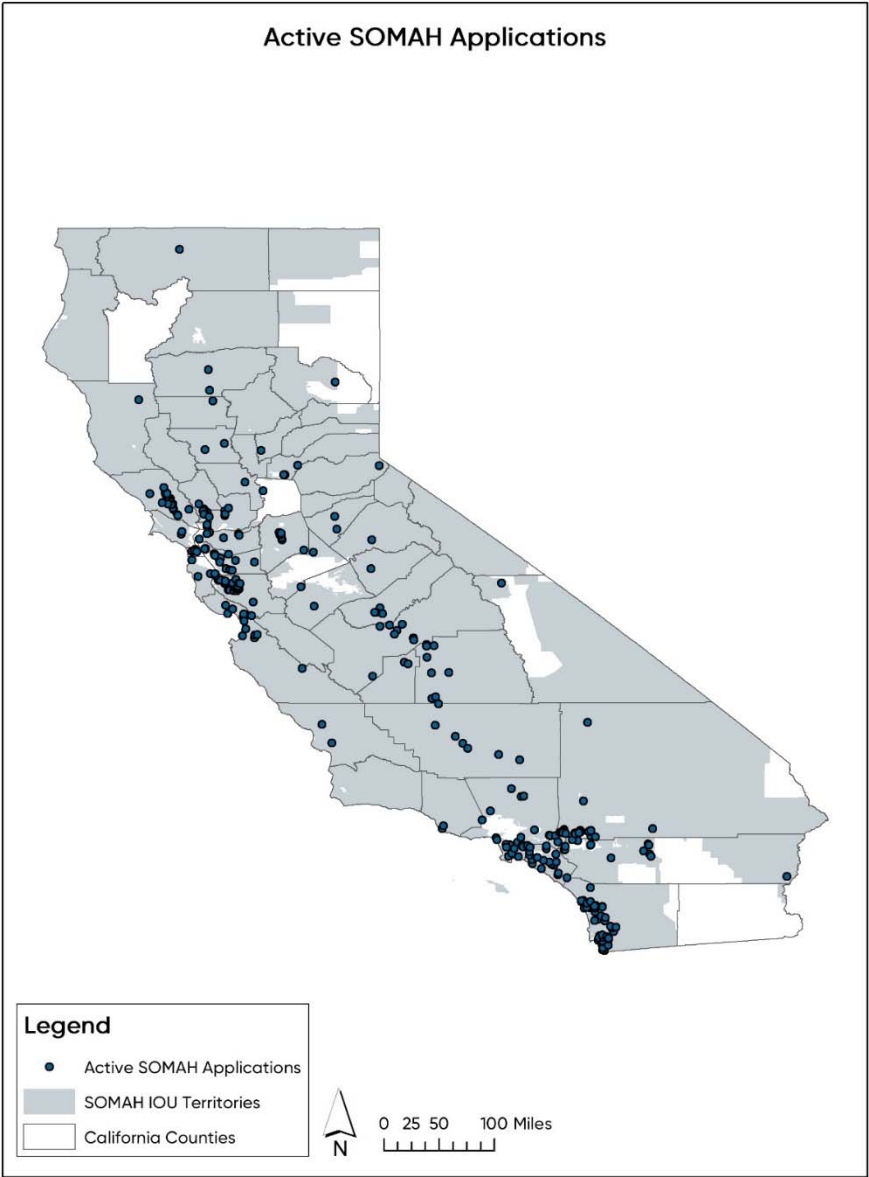


Table 1: Number of applications by IOU territory (2019 vs. 2020)

IOU Territory	2019	2020
	# of applications *	# of applications *
PG&E	148	231 (+83)
SCE	116	162 (+46)
SDG&E	51	80 (+29)
Liberty Utility	1	2 (+1)
PacifiCorp	1	1

* includes waitlisted and cancelled applications

In 2020, the SOMAH PA focused outreach to property owners in DACs across the state, to ensure tenants in California’s environmental justice communities have access to the benefits of clean energy. The SOMAH PA connected with 70 property owners with properties in DACs in the Central Valley and the Los Angeles regions. The SOMAH PA also used 2020 market research to better understand the level of current versus potential participation of properties in DACs. Approximately 31% of new applications in 2020 were located in DACs -- roughly proportional to the estimated share of all potentially-eligible properties in DACs (See *Market Research and Program Participation* section for more statistics on eligible properties in DACs)

As the SOMAH PA continues to prioritize outreach to DAC communities, it is also addressing geographic gaps in both the Central Valley region, and PacifiCorp and Liberty Utility territories. Both PacifiCorp and Liberty Utility have a smaller number of potentially-eligible SOMAH properties, 30 and 10, respectively, and a lower number of eligible, local contractors. In 2021, the SOMAH PA will be conducting more targeted outreach to increase the number of SOMAH-eligible contractors in/near these service territories to increase Track B applications. To address these geographic gaps, the SOMAH PA has begun working with a fifth CBO partner - Self-Help Enterprises - to help bolster outreach in the Central Valley region.

Objective 3: Continue to build and engage a robust and diverse contractor base

Outreach & engagement

Overall, engagement efforts in 2020 resulted in 21 new SOMAH-eligible contractors -- an increase of 21% from 2019 -- bringing the total number from 102 to 123. Since program launch, contractors have reserved \$150 million of SOMAH program funding and continue to be leading application submissions through Track B. The beginning of 2020 was promising for engaging new contractors. In February, SOMAH participated in two solar-industry focused conferences:

- **Intersolar Conference:** February 2020, San Diego, CA: Panelist and exhibitor
- **EPIC Forum:** February 2020, Long Beach, CA:

Following the conferences, 30 contractors attended the March Contractor Eligibility Training. By contrast, later in the year when in-person engagement was not taking place, Contractor Eligibility Training webinars had fewer attendees. A similar trend of increased contractor registration post-conference also occurred in 2019, after SPI (Solar Power International). During the months of April, May, July and September, attendance at Contractor Eligibility Trainings ranged from three (3) to 19 attendees.

To better understand the diversity of engaged contractors, the SOMAH PA updated the application process to capture subcontractor information (at the Proof of Project Milestone). To encourage contractor diversity and participation, subcontractors are required to fulfil the SOMAH Contractor Eligibility Training before they can be added as a subcontractor in the application database, PowerClerk.

Contractor survey results

While many projects planned to complete construction in Q2 of 2020, shelter-in-place orders and the uncertainty around solar being considered an essential service forced many projects to delay their construction plans to Q3 and Q4 of 2020. To better understand barriers-to-entry for contractors, the SOMAH PA deployed a contractor barriers survey via the CalSOMAH listserv on August 20 and collected responses through October 31, 2020.

In total, 34 out of 205 contractors participated in the survey⁵. Some of the main challenges impacting their ability to participate in the SOMAH program included:

- challenges in generating project leads
- confusion about SOMAH program requirements
- financial barriers

Contractors also identified that tenant education and job training program requirements were not always clear. To address this, the SOMAH PA is revisiting its communications with contractors and finding strategic ways to communicate tenant education and job training requirements more effectively and clearly, particularly focusing on the Applicant and Contractor Eligibility Trainings. Contractors also indicated that the following resources were the most helpful for them in supporting their participation:

- marketing materials for customers
- financing resources
- Technical assistance (TA) services
- educational webinars

In 2021, the SOMAH PA plans to provide resources touching these specific areas in an email drip campaign that will include links to the Contractor Marketing Toolkit, the map of SOMAH eligible properties to support contractors that are struggling with lead generation and information on TA services available. The SOMAH PA will also be developing webinars to provide more information around these topics and areas they've identified.

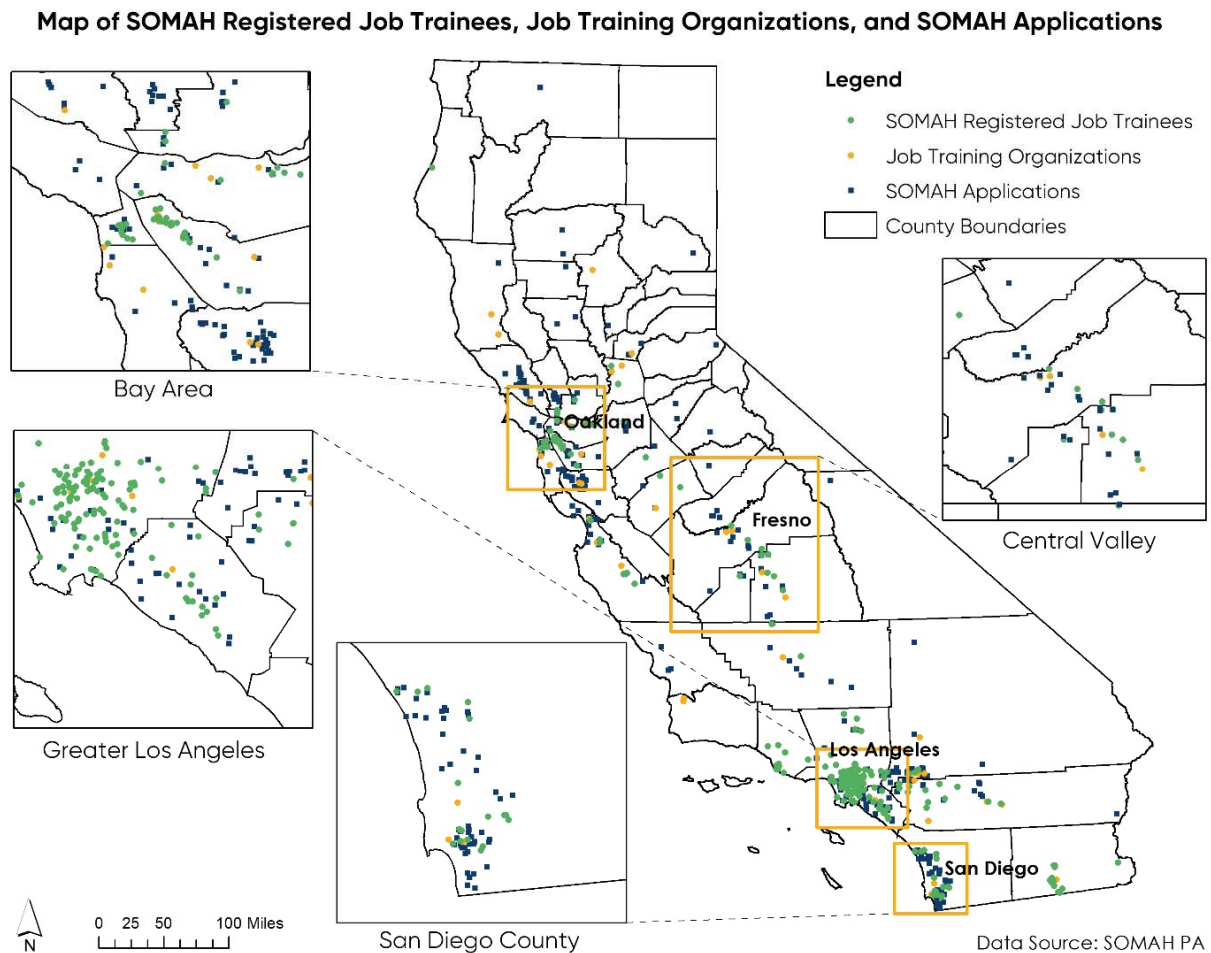
Objective 4: Ensure sufficient job trainee participation for projects to meet training requirements

To ensure enough eligible job trainees were engaged and ready for SOMAH projects, the SOMAH PA continued to build the pipeline of trainees in 2020 by conducting outreach to

⁵ Three approaches were taken in an effort to increase contractor survey participation: 1) mass email from SOMAH listserv; 2) direct emails from SOMAH team members and; 3) phone calls from SOMAH team members.

eligible job training organizations (JTOs), focusing on regions that have a high volume of active SOMAH projects.

Map 3: Geographic distribution of SOMAH-registered job trainees and JTOs, overlaid with SOMAH applications

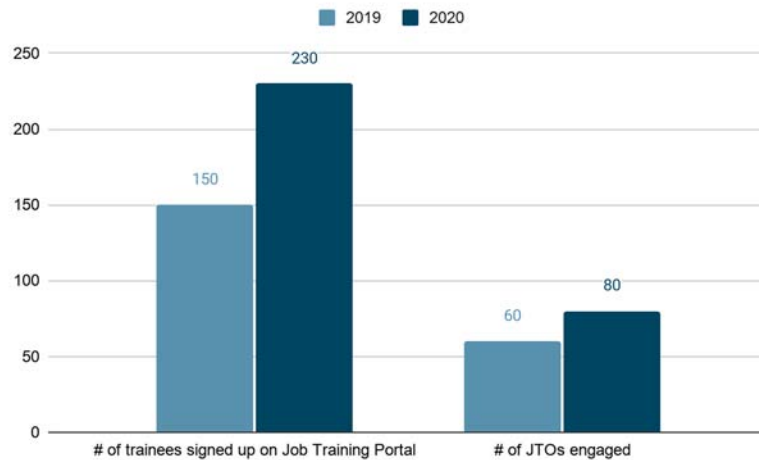


Job training organization and trainee outreach

In coordination with SOMAH’s workforce development partner, Rising Sun Center for Opportunity, the SOMAH PA held one webinar for instructors and administrators of JTOs, one in-person presentation to prospective job trainees, and two remote presentations to prospective job trainees. The SOMAH PA engaged 20 new JTOs in 2020 bringing the total

number of engaged JTOs to 80. Additionally, 160 new job trainees signed up on the SOMAH Job Training Portal in 2020, bringing the total number of job trainees to 290.

Graph 2: Job Training Organization and Trainee Survey Results



In Q2 2020, the SOMAH PA surveyed JTOs and job trainees about the impact of COVID-19 on their training programs and employment situation. Survey results showed that the majority of JTOs were continuing their training programs online and JTOs were still engaged with their students and trainees, and the majority of job trainees responded that they were currently unemployed, looking for work in the solar industry, and were still interested in participating in SOMAH job training opportunities. Although most job training outreach activities were already conducted remotely, the SOMAH PA transitioned all outreach activities, including job trainee presentations to online. The SOMAH PA was able to engage over 60 job trainees in a virtual Solar Career Pathways and Resume Writing Workshop series in July 2020 and will continue to plan remote career development events for job seekers into 2021.

The SOMAH PA has continued to rely on its partners and advisory bodies to help guide ME&O efforts. The SOMAH Job Training Organization Task Force launched in March 2020 and has begun to advise the SOMAH PA on strategies to conduct outreach and engagement with JTOs and job trainees. Additionally, SOMAH's CBO partners have also helped adapt SOMAH's job training outreach materials including flyers and the Job Trainee Intake Form, to be culturally relevant and accessible to their communities.



Contractor engagement & resources

To ensure contractors continue to be informed about and understand job training requirements, the SOMAH PA made adjustments to the Contractor Eligibility Training, communications in the application process, and on the SOMAH program website to provide more clarity and information. Additionally, the SOMAH PA held a special webinar for contractors on the job training requirements and best practices for local and targeted hiring in January 2020 with 36 total attendees (22 of which were contractors). The Public Forum in August 2020 also highlighted the tenant education and job training requirements, which was well-attended by contractors.

The SOMAH PA also focused on safety resources in 2020 by beginning work on a jobsite safety guide that is slated to be published in Q1 2021 as a resource for contractors and job trainees. The SOMAH PA also held a [COVID-19 safety webinar](#) with a representative from Cal/OSHA in July 2020. This was one of SOMAH's best attended webinars with 58 attendees.

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

Community-based organization partnerships

In 2020, CBO partners became more versed in the intricacies of the SOMAH program and despite COVID-19 shelter-in-place orders, continued their community events for both tenants living in potentially-eligible SOMAH properties, and tenants living in participating SOMAH properties. Because of the impacts of the pandemic, CBOs shifted their outreach to be fully remote, and updated their messaging and programming for community outreach -- integrating SOMAH messaging into materials and events about COVID-19 safety, economic recovery, and disaster preparedness to support the communities they work with. Overall, in 2020, CBOs conducted a series of 22 outreach events reaching 535 attendees. In late 2020, the SOMAH PA also welcomed an additional CBO partner, Self-Help Enterprises (SHE), to support outreach efforts in the Central Valley -- a region that has been a geographic gap in outreach efforts. SHE will work in coordination with SOMAH's other CBO partners to execute outreach to tenants.

The SOMAH PA continues to receive feedback from CBO partners on outreach materials and messaging, and they will be joining the SOMAH PA in providing tenant education services: a "train-the-trainer" series that aims to educate property owners and contractors on how to use the tenant education toolkit and conduct tenant education; and a pilot service allowing CBOs and the SOMAH PA to help property owners achieve their second tenant education goal.

IOU coordination & co-marketing

In 2020, the SOMAH PA began working closely with IOUs to create user-friendly Virtual Net Energy Metering (VNEM) bill samples to ensure that tenants are able understand their electric utility bills when SOMAH bill credits are included. The SOMAH PA also worked with IOUs to collate, organize, and prioritize a list of CBOs that currently partner with IOUs to co-market CARE, FERA, and other IOU offerings, and to identify potential CBO leads for SOMAH co-marketing opportunities. Outreach to these potential CBO co-marketing partners will begin in early 2021 with a co-marketing toolkit that the SOMAH PA has begun to develop. The SOMAH PA has also begun exploring activities to co-market energy savings/assistance programs with IOU partners and create tenant education training for property owners. While some initial progress on these activities was made in 2020, they will be prioritized in the 2021 ME&O Plan.

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

In 2020, the SOMAH PA focused stakeholder engagement to government and legislative officials within DACs and CCAs. The outreach efforts were focused on 1) stakeholders in DACs where SOMAH projects are located as well as 2) stakeholders in DACs where eligible properties have been identified but applications have not been received by the program. In 2020, SOMAH initiated engagements with 63 government and legislative officials and 24 CCA stakeholders.

The SOMAH PA was able to secure a total of seven (7) presentations with government and legislative officials, along with four (4) CCAs. Following the presentations, branded materials were provided to keep the stakeholders engaged and allow them to promote SOMAH to their constituents on their digital channels. The SOMAH PA believes the relatively low response rate from stakeholders was attributable to COVID-19 emergency priorities statewide. However, the SOMAH PA has been successful in getting two CCAs – Clean Power Alliance, and San Jose Clean Energy – to provide descriptions about the SOMAH program on their websites, which have generated web traffic to the Calsomah.org website.

From the SOMAH PA's engagement with local elected and government officials, the SOMAH PA learned that they were interested in participating in SOMAH project ribbon-cutting ceremonies, where they could be invited to mark the completion of a project. This confirmed that impact stories are important to stakeholders. Greater emphasis will be placed on stakeholder outreach in 2021 as SOMAH projects reach completion and impact stories are collected. Additionally, the SOMAH PA began designing an "Impact" page for CalSOMAH.org to house top-line program impact metrics and success stories.

Takeaways & conclusions

Despite the challenges 2020 presented, the SOMAH PA adapted and updated its ME&O tactics to make progress toward its ME&O objectives and overall program goals. The program continues to achieve positive results: 2020 saw 159 new applications representing 6.5⁶ MW of reserved new capacity, including 1.8 MW in DACs, the first project receive interconnection, job training experiences for trainees (including a tenant of a SOMAH property), and a new partnership with the CBO Self-Help Enterprises that will enhance the team's capacity to reach more underserved communities across California in 2021.

The SOMAH PA acknowledges that the COVID-19 pandemic will continue to impact the program's 2021 ME&O efforts, and that the broader impacts of COVID-19 across the economy and SOMAH-relevant industries are yet to be fully seen. These broader COVID-19 impacts, as well as impacts from future disasters like wildfires, and civil rights movements like Black Lives Matter are likely to be experienced most deeply by marginalized groups including Black and brown, environmental and social justice communities in California -- the communities that SOMAH is intended to serve.

Key Program Audiences

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

Property owners

Property owners of multifamily affordable housing more than ever are experiencing financial constraints and limited bandwidth due to 2020's health and economic challenges. Furthermore, property owners with smaller portfolios (1-5 properties) may have little to no experience with participating in energy efficiency and solar incentive programs. Engaging this

⁶ Projected MW based on 52 applications that have met program milestone: Reservation Request Approval

audience requires direct outreach focused on: making the application process easy to understand and access; communicating SOMAH's benefits, including no-cost, upfront technical assistance resources such as the Track A application route. In response to shelter-in-place restrictions and continued social distancing guidelines, the SOMAH PA intends to increase its virtual presence and engagement with this audience.

Segments of this audience include:

- Affordable housing property owners consisting of nonprofits, public housing authorities and for-profit entities. To further distinguish the property owner group, the SOMAH PA has identified two subsegments:
- New-to-SOMAH: Property owners who have no knowledge and/or engagement with the SOMAH program.
- SOMAH subscriber: Property owners who have subscribed to the SOMAH email list but have not yet submitted a program application.
- Affordable housing associations and networks of nonprofit property owners
- Government/nonprofit housing agencies that regulate deed-restricted, low-income multifamily rental housing

Challenges identified and lessons learned in 2020 for engaging property owners include:

- The COVID-19 pandemic has made it challenging to engage this audience. Informal interviews with owners show the main challenges they are facing are: the prioritization of tenant health protection measures; limited cash flow due to inconsistent rent collection, and uncertain housing policies.
- Multiple touch points are needed for property owners to fully grasp the program. Outreach planning needs to allow for a longer education process, especially when targeting property owners with little-to-no experience with solar PV or energy efficiency.
- The cost-benefit analysis of tenant PV can be a challenge, despite their interest in providing economic benefits to their tenants. Even with an incentive rate designed to cover 100% of the initial cost, some upfront costs may be required due to property circumstances and market conditions in addition to potential operation and

maintenance (O&M) costs, though some contractors account for aspects of O&M in their contracts.

- For some property owners, getting comfortable with the long-term financial responsibility and liability are deciding factors for program participation. By clarifying and promoting upfront technical assistance property owners can receive the support and information they need to make informed decisions and move forward with selecting a contractor.

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 information about SOMAH and its offerings with different audiences. They need to access information about program eligibility and requirements, instructions on submitting applications, and online bidding. Additionally, they need access to tools and resources that help them promote the SOMAH program to specific audiences, i.e., property owners.

Segments of this audience include:

- Solar companies or individual solar contractors with an active SOMAH application
- Solar companies or individual solar contractors signed up as an Eligible SOMAH Contractor, but have not submitted a SOMAH application
- Other types of contractors seeking to grow a solar business
- Solar subcontractors

Challenges identified and lessons learned in 2020 for engaging solar contractors include:

- Due to COVID-19, the solar industry came to a stop in 2020 before it was identified as an essential service. During this time, layoffs and furloughs were reported across the industry.⁷ Contractors with SOMAH applications identified issues with financing projects and completing program milestones due to declining revenues and quarantine orders, respectively.

⁷ The California Solar and Storage Association conducted a [survey](#) in April 2020. The survey results approximated 15,600 jobs were affected.

- 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 Metering (VNEM), affordable housing and the IOUs' interconnection processes.
- SOMAH projects call for staff that are familiar with multifamily installations as well as access to financing sources to leverage until incentives are released, which is a challenge for small businesses that are short-staffed and do not have as much capital.
- 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. Additionally, contractors expressed difficulty obtaining documentation and getting signatures from clients, and local permitting offices/agencies, due to the pandemic.

Affordable housing tenants

Tenants of multifamily affordable housing are often culturally and linguistically diverse, and may have lower levels of traditional educational attainment. They also often work one or more jobs with lower wages. They have familiarity with government services but may be distrustful of programs they do not already interface with, and likely have little or no knowledge about solar energy systems. Access to the internet is often heavily mobile-dependent. This segment needs easy-to-understand, linguistically-accessible information about SOMAH 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 include:

- *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

Challenges identified and lessons learned in 2020 for engaging tenants included:

- Contractors are conducting tenant education requirements on behalf of property owners, given that property owners often lack expertise in how to engage and educate tenants about SOMAH.
- CBOs can provide additional services to support property owners in meeting their tenant education requirements.
- CBOs continue to support tenants of potentially-eligible SOMAH properties to share information about SOMAH with property owners/managers/landlords to in order to bring SOMAH to their building.
- A robust outreach plan is needed for both tenant audience segments, focused on sharing resources and offering support around potential SOMAH job training opportunities, to ensure they are able to take advantage of these opportunities.
- Surveys and interviews from 2020 demonstrate that property owners participating in Track B (contractor-driven) projects are often unaware of the Tenant Education requirements. The SOMAH PA must continue to highlight the tenant education requirements in all property owner outreach -- webinars, project milestone email reminders, etc.

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 DACs and low-income communities, may experience barriers to employment and barriers to participating in SOMAH job training opportunities, 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. The COVID-19 pandemic has further perpetuated these barriers and related economic challenges, particularly in DACs.

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 support and the directory of eligible job training programs on the SOMAH Job Training Portal.



Segments of this audience include:

- Eligible job trainees, prioritizing trainees who live within the same county as the project, and targeted populations including residents of DACs, affordable housing residents, women, people of color, and other individuals who have faced or who have overcome at least one of the following barriers to employment: being homeless, being a custodial single parent, receiving public assistance, lacking a GED or high school diploma, participating in a vocational English as a second language program, or having a criminal record or other involvement with the criminal justice system
- Tenants of SOMAH properties
- Community members connected with CBO partners
- Job Training Organizations with SOMAH-eligible programs

Challenges identified and lessons learned in 2020 around engaging JTOs and trainees included:

- More ongoing communication is needed to keep the nearly 80 SOMAH-eligible JTOs updated on the location and status of SOMAH projects and job training opportunities through email updates and webinars. In order to support SOMAH's local hiring goals, the SOMAH PA will continue to focus JTO outreach efforts in areas where there is a high volume of SOMAH projects.
- The SOMAH PA will continue to identify barriers to participation by job trainees through surveys, feedback from the JTO Task Force, and CBO partnerships. The SOMAH PA will use this feedback to create resources, pivot outreach, and update strategies to make SOMAH's job training opportunities more accessible to local job trainees.
- The SOMAH PA will continue to 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 solar employers, such as a best practice guide for hiring underserved workers.

Stakeholders

Stakeholders comprise 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/customers. 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 benefits a SOMAH installation may bring — both as a property owner and as a tenant. For local governments, their interest in SOMAH may be motivated by the potential benefits SOMAH may have for local residents and businesses, and co-benefits to local initiatives, such as the positive contribution a SOMAH project can have on local climate action plan goals. For state legislators and the California Public Utility Commission, their concerns focus on the effectiveness of the SOMAH program in achieving state goals and how well the program is being managed. Additionally, SOMAH will focus its stakeholder outreach in DACs to ensure that stakeholders in the state’s environmental justice communities are aware of the SOMAH program and its benefits.

In all cases, there are opportunities to cross-promote SOMAH in conjunction with existing 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 how to refer a potential applicant to SOMAH. This audience needs general program talking points in addition to timely communication around program milestones and changes.

Segments of this audience include:

- Utilities/IOUs/CCAs: e.g., East Bay Community Energy, Peninsula Clean Energy, San Jose Clean Energy
- 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)
- Authority Having Jurisdictions (AHJs) and permitting offices

Challenges identified and lessons learned in 2020 for engaging stakeholders included:

- The COVID-19 pandemic led stakeholders to deprioritize engagement with non-critical entities such as the SOMAH program. Also, shelter-in-place orders stopped in-person events where initial contact with stakeholders was planned.
- Stakeholders want to see case studies that focus on program achievements, savings analyses, and benefits to tenants residing in SOMAH project sites. Case studies focused on the direct results of the PV system will not exist until projects begin development and receive interconnection in 2021.
- Interests vary across each stakeholder audience segment. As the program progresses, stakeholder communications will require tailored messaging that aligns with each segment in order to effectively engage them in the program.

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
WEB & SOCIAL ENGAGEMENT						
CalSOMAH.org						
Digital display ads						
Email campaigns						
Social media - paid						
Social media - organic						
Webinars						
SEM (Search Engine Marketing)						
Sponsored content						
Partner toolkit						
Partner backlinks						

Channel	Property Owner	Tenant	Contractor	Job Seeker	JTO	Stakeholder
WEB & SOCIAL ENGAGEMENT						
CalSOMAH.org						
Digital display ads						
Email campaigns						
Social media - paid						
Social media - organic						
Webinars						
SEM (Search Engine Marketing)						
Sponsored content						
Partner toolkit						
Partner backlinks						
DIRECT OUTREACH						
Virtual conferences, trade shows & job fairs						
Digital collateral						
Virtual workshops & meetings						
Direct calls & direct emails						
Direct Mail						
Public forums						
MEDIA						
Community news media						
State news media						
Trade publications						

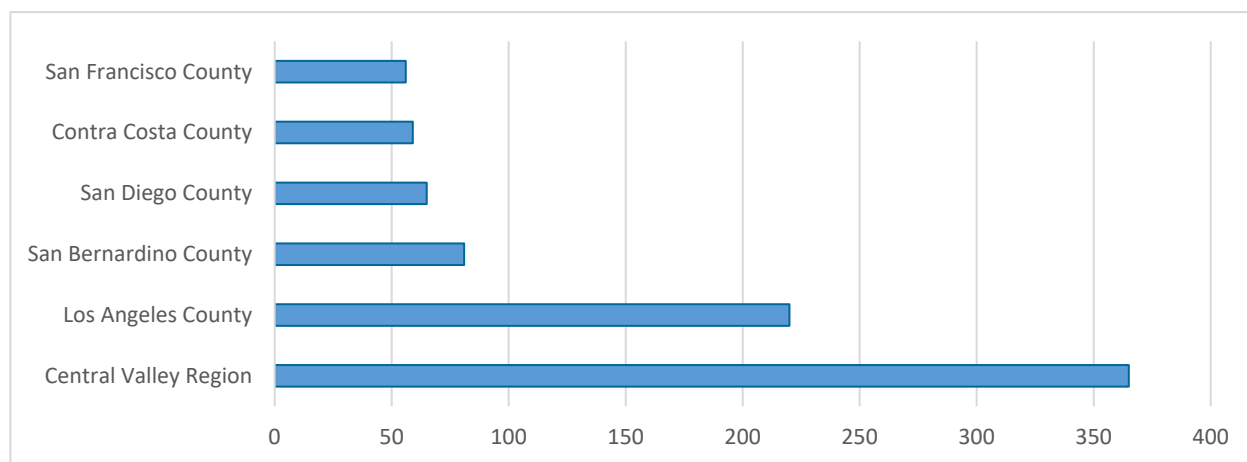
Market Research & Program Participation

Background

The SOMAH PA completed 2020 multifamily market research to build on prior market analysis conducted by the California Housing Partnership to explore key market segments and identify opportunities to expand targeted marketing efforts. A point of focus for the 2020 market analysis consisted of broadening the analysis of SOMAH-eligible properties located in DACs to help the SOMAH PA better strategize around increasing program participation in underserved areas with high concentrations of DACs. To this end, the 2020 market analysis identified regions with the highest concentrations of eligible properties in DACs.

As shown in the graph below, analysis revealed the Central Valley, Los Angeles County and San Bernardino County as the regions with the highest concentration of SOMAH-eligible properties in DACs. The Central Valley is the region with the highest concentration of SOMAH-eligible properties in DACs, with approximately 72% of all eligible properties located in DACs.

Graph 3: Regions with Highest Concentration of Properties in DACs



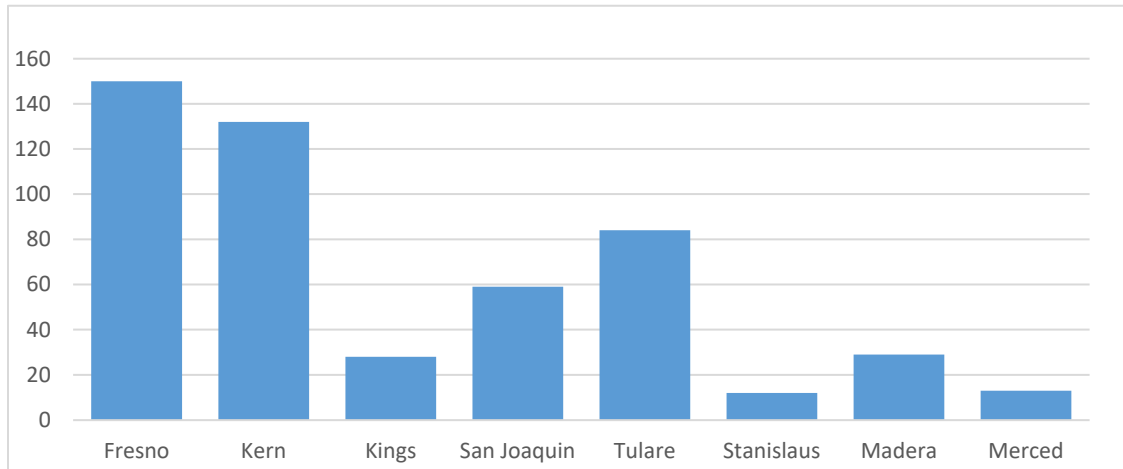
Central Valley market analysis

The 2020 market analysis included an in-depth geographical analysis of high-priority areas, such as the Central Valley, to further inform outreach efforts in DACs. This analysis provided insight on the profile of property owners in the Central Valley region — including identifying that the vast majority of property owners in the region have smaller portfolios (1-5 properties) and who may be harder to reach and would be good candidates for upfront technical assistance. In total, data shows there are approximately 200 property owners in the Central Valley Region.

Central Valley Property Owners with Largest Portfolios	
Property Owner	Portfolio Size (#of properties)
Corporation for Better Housing	40
Fresno Housing Authority	28
CV Coalition for Affordable Housing	20
Silvercrest, Inc.	15

The geographical analysis of the Central Valley, shown below, reveals that Fresno, Kern, and Tulare counties account for over 72% of potentially-eligible properties in the Central Valley Region.

Graph 4: Central Valley Breakdown of Properties by County

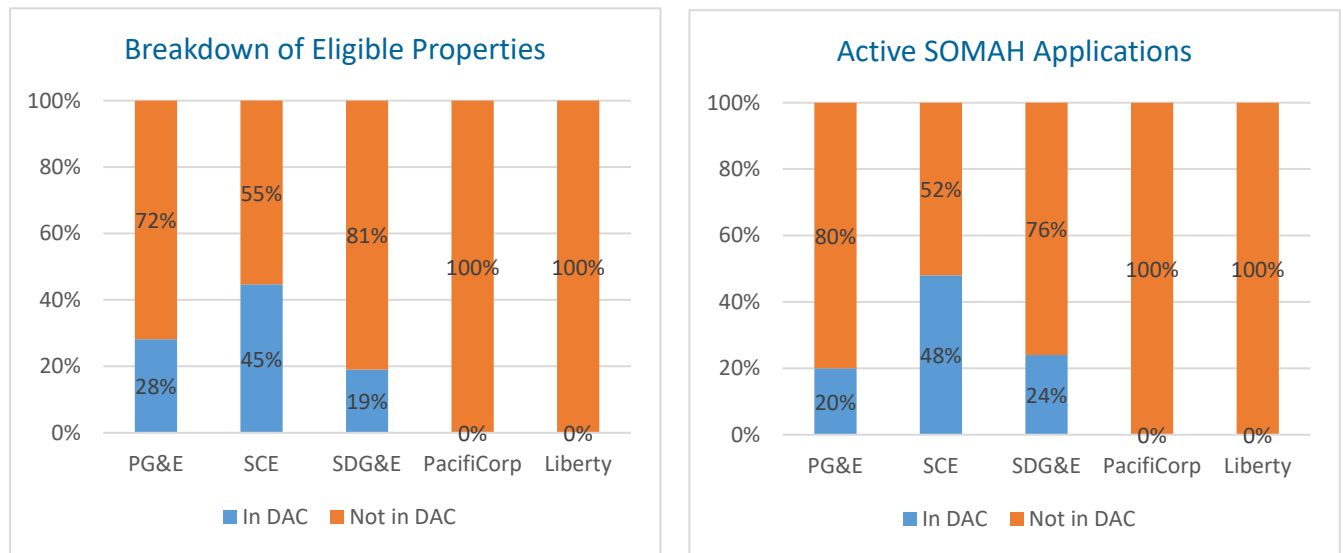


Properties in Disadvantaged Communities (DACs)

As of December 2020, there are over 400 active SOMAH applications. Approximately 31% of active applications are for properties in DACs — which is just above the 30% overall share of potentially-eligible properties in DACs. As illustrated in the graphics below, the market analysis reveals that, on average, each IOU's share of active SOMAH applications in DACs is proportional to their overall share of potentially-eligible properties in DACs. While the share of applications in DAC territories has slightly increased to 31% of active applications, most

applications still come from the metropolitan regions of the Bay Area, Los Angeles, and San Diego.

Graphs 5 & 6: Comparison of SOMAH-eligible Properties & Active Applications in & out of DACs by IOU



The SOMAH program will use the 2020 Market Analysis to better reach communities that remain underserved. This includes prioritizing properties in DACs, setting targets and benchmarks for outreach, and helping secure more property owner participation via the Track A application pathway. To better understand the remaining gaps in the SOMAH program pipeline, the 2021 Market Analysis will include:

- A projection of newly constructed properties in the LIHTC pipeline for the next 2-3 years, to continue building a multiyear pipeline
- An inventory of property owner organizations with a community-based model, led by people of color, and serving communities of color to ensure the SOMAH program is delivering program education and benefits to diverse communities
- Development of a model to better gather and analyze tenant demographic information with regard to race and ethnicity to understand SOMAH's impact on the equitable distribution of clean energy dollars at the tenant level
- Continued DAC analysis — including working to develop categories for property owner types in DACs for more targeted outreach, and deeper analysis of major funding sources for DAC properties to draw insight on improved strategies for outreach to property owners in DA

Strategic Approach

The SOMAH program's approach to marketing, education and outreach centers equity and community benefits, awareness-to-adoption engagement and strategic partnerships with groups that are already working with the audiences that SOMAH targets. These groups include CBOs, IOUs, trade organizations and state and local agencies. For the 2021 ME&O Plan, the SOMAH PA is continuing to prioritize outreach to DACs to ensure that the state's most under-resourced communities are meaningfully engaged and are able to access SOMAH's benefits. Additionally, in response to the COVID-19 pandemic and other significant events around movements for civil rights, the SOMAH PA and its CBO partners will focus on improving strategies for more effective digital engagement and outreach. The SOMAH PA will also be using data to pilot tactics with specific audience segments and geographies.

Ensuring equity and diversity

SOMAH was established through the advocacy of communities on the frontlines of movements for energy equity, environmental justice, and green jobs. Through a community-based approach, the SOMAH PA is continuing to prioritize diverse participation across SOMAH's key program areas to ensure that community voices remain at the forefront and SOMAH benefits the communities it was intended to serve. The SOMAH PA will continue to leverage data to understand the evolving makeup of participating properties, tenants, contractors, and trainees, and identify and address barriers to entry and participation. Acknowledging that there are multiple types of "diversity", the 2021 ME&O plan will clarify which types of diversity are priority for specific audiences and objectives. SOMAH's 2021 ME&O activities will ensure equitable outcomes across our program objectives by continuing to focus on:

- Developing targeted strategies and tactics in coordination with CBO partners that achieve a greater geographic diversity of projects — addressing geographic gaps across IOU territories, state regions, and DACs — and a greater diversity of property types and sizes.
- Understanding the barriers to participate in SOMAH across our audiences; developing and implementing strategies that ensure geographically and demographically diverse participation across audiences; setting targets and benchmarks for the above.
- 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

Prioritizing Disadvantaged Communities (DACs) and ensuring community benefits

Low-income affordable housing residents, especially families of color, have a high energy burden and have historically lacked access to clean energy solutions while living in some of the state's most polluted neighborhoods. The SOMAH PA acknowledges that DACs are not just low-income communities — they are environmental justice communities that experience environmental racism through the disproportionate burden of multiple sources of pollution, spanning the twenty indicators of the CalEnviroScreen 3.0 framework⁸: from diesel and particulate matter exposure, to environmental effects of impaired water bodies, to population sensitivities like asthma and low birth weight infants, to socioeconomic factors, like poverty, housing burden and unemployment. In 2021, the SOMAH PA will prioritize DACs in its ME&O activities in the following ways:

- Formulating goals for DAC participation (properties, trainee targets) based on market assessment work underway
- Targeting and reaching all property owners (or property management entities) of potentially-eligible properties in DACs to: a) ensure they have clear and compelling reasons to participate in the SOMAH program, and b) leverage tenants to share program information and benefits with their property owners/managers
- Facilitating the partnership between CBOs and JTOs in order to connect community members to SOMAH job opportunities, and increasing awareness of Solar Industry career pathways

Awareness-to-adoption and "pilot-and-scale" engagement

The SOMAH PA continues to employ an approach to ME&O 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 — through to participating in the program, and all the touch points in between. All marketing materials will continue to 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

⁸ ["Analysis of Race/Ethnicity, Age, and CalEnviroScreen 3.0 Scores,"](#) Office of Environmental Health Hazard Assessment, California Environmental Protection Agency



step. Acknowledging that our audiences encompass large and diverse ranges of individuals or entities, the SOMAH PA is dividing its audiences into segments in order to reach them more effectively.

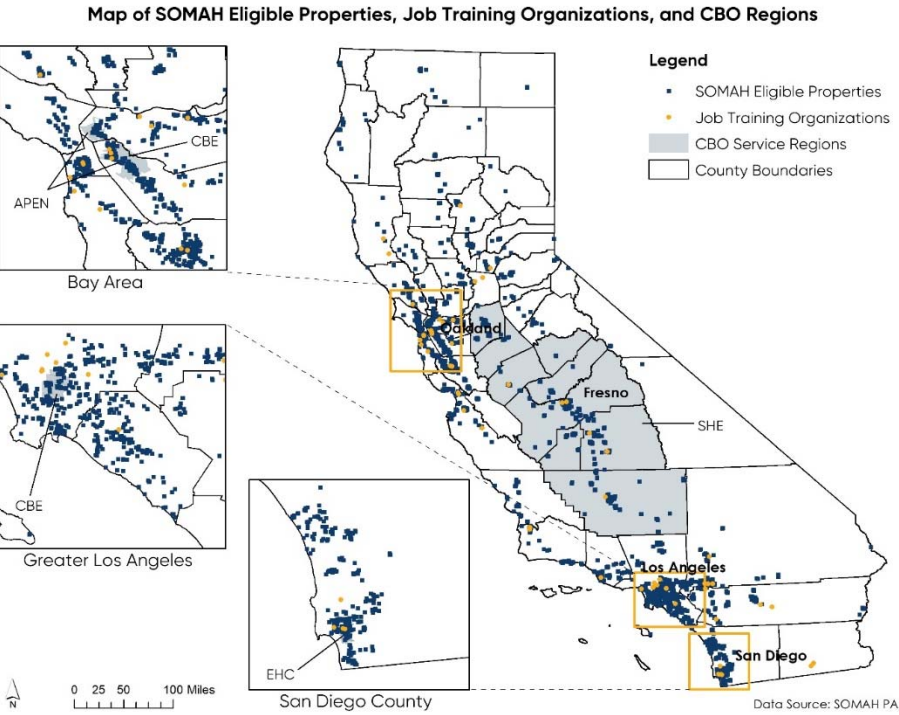
Recognizing the breadth, scope and scale of the SOMAH program, and given that we have some tried and tested methods of engagement, the SOMAH PA will be exploring a “pilot-and-scale” approach to ME&O that will focus on audience segments and/or smaller geographic regions, to pilot and test ME&O tactics and strategies. Then, depending on the outcomes of the pilot, the SOMAH PA will scale these tactics and strategies to other regions or audience segments. This “pilot-and-scale” approach will help the SOMAH PA be more strategic with resources and capacity.

Strategic partnerships and collaborations

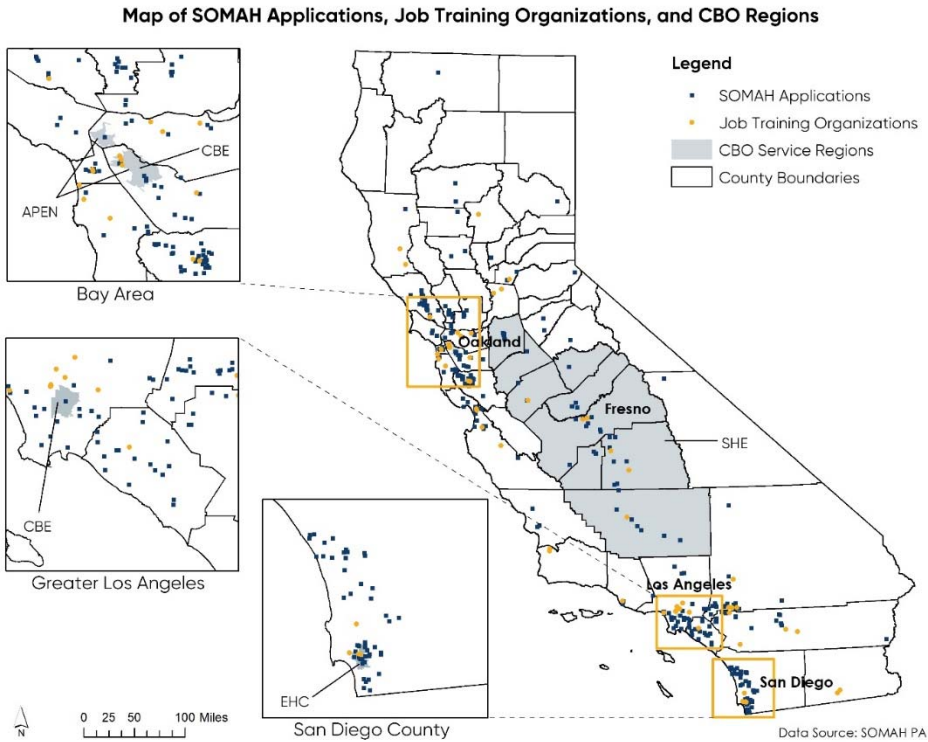
SOMAH is a large, multifaceted program that requires educating and engaging different audiences to achieve diverse participation and reach the program’s goals. To do this successfully, the SOMAH PA relies on partnerships with CBOs and JTOs, and coordination with IOUs and local/state agencies to connect effectively with key audiences across the state. Partnerships with CBOs and JTOs will continue to help the SOMAH program be transparent and accountable to the communities it serves, while elevating voices within SOMAH’s priority communities. These partner organizations have built strong networks in environmental justice communities across California and expand the PA’s outreach efforts to DACs and underserved audiences. In 2021, CBOs and JTOs will support 2021 ME&O objectives by:

- [CBOs] Continuing to ensure materials that promote SOMAH to tenants and property owners, and tenant education materials, are culturally and linguistically relevant
- [CBOs] Conducting direct outreach across the state to tenants, JTOs, and potential job trainees about SOMAH’s benefits and opportunities, and piloting tenant education workshops and services in DACs
- [CBOs] Sharing approaches, strategies, and resources with property owners that help support tenant education requirements
- [JTOs] Supporting contractors with local and targeted hiring of job trainees
- [JTOs] Promoting SOMAH to contractors and supporting diverse contractor participation
- [CBOs & JTOs] Surveying tenants, job trainees and property owners to gather program feedback and adjust outreach tactic

Map 4: Overlay of CBO organizing areas and reach, JTO locations and SOMAH-eligible properties



Map 5: Overlay of CBO organizing areas and reach, JTO locations and SOMAH applications



In addition to direct CBO and JTO partnerships, the SOMAH PA will continue to 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, affordable housing associations, and local and state agencies to both broaden and target SOMAH's outreach efforts. 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.

Emphasizing digital & remote engagement in response to COVID-19

Due to the COVID-19 pandemic and subsequent social distancing orders, the SOMAH PA and its CBO partners had to quickly move all in-person outreach and engagement online beginning in March 2020. Until it is safe to resume in-person activities, the SOMAH PA will plan to maintain a predominantly online and remote engagement and outreach approach through 2021, to protect the health and safety of our audiences and to anticipate any future quarantine restrictions.

Moving to predominantly digital programming presents both challenges and opportunities that the SOMAH PA and CBO partners will continue to navigate. While many community members may lack broadband and laptop/desktop computers, mobile access is broader via smartphones. The SOMAH PA is looking to explore "mobile-friendly" tactics and activities, such as ensuring the job portal has a mobile-friendly interface, or possibly texting campaigns. Shifting to predominantly digital programming, however, has also created opportunities to explore new and creative methods with online engagement, such as using "chat", "annotate", and "virtual breakout" features in video conferencing platforms to create more interactive digital meetings. While the virtual affordable housing conferences provided the opportunity for some level of owner engagement through the virtual exhibit booth, owner engagement was less effective than conference participation in 2019. This could be simply due to learning to navigate the online platform and/or burnout from virtual meetings. Nevertheless, attending remote events is often logistically easier for people who lack transportation or may have to make arrangements to attend an in-person event. Meeting people on their computers has been helpful in maintaining attendance and engagement.

Additionally, the SOMAH PA continues to employ offline remote tactics for reaching audiences including phone calls, mailers, flyers etc.

2021 Objectives and Activities

SOMAH's 2021 ME&O Objectives

Applying the strategic approaches outlined above, along with insights and learnings from 2020 ME&O efforts and 3rd party program evaluation recommendations⁹, the goals for 2021 are:

1. [Goal 1: Engage property owners to build and maintain a multiyear pipeline of diverse projects](#)
2. [Goal 2: Continue to build a robust and diverse contractor base and support eligible contractor retention](#)
3. [Goal 3: Ensure sufficient job trainee participation and preparation for SOMAH job training opportunities or relevant careers](#)
4. [Goal 4: Educate SOMAH-eligible tenants and tenants living in participating SOMAH properties about the program and how to maximize their benefits](#)
5. [Goal 5: Ensure stakeholders are informed of and helping to co-market the program](#)

Below, each goal is further defined by an overall narrative of what the SOMAH PA is hoping to achieve; and a set of SMARTIE¹⁰ objectives that provide concrete, measurable milestones to achieving each goal as well as targets/benchmarks. Each goal also lists a set of key performance indicators (KPIs) or metrics that the SOMAH PA will use to evaluate and measure the progress of each goal, as well as the audiences and primary activities/tactics the SOMAH PA will employ to achieve the objectives.

⁹ The goals of the 2021 ME&O plan are in alignment with those identified by SOMAH's 3rd party program evaluation recommendations and findings, in particular Recommendation #3 around increasing applicant diversity – both property owners and contractors – and Recommendation #2 around setting benchmarks and targets for workforce development requirements.

¹⁰ SMARTIE = Strategic, Measurable, Actionable, Realistic, Time-bound, Inclusive, and Equitable

This organizational structure differs slightly from previous plans primarily in setting more measurable objectives, identifying targets/benchmarks, and adapting the KPIs we are prioritizing in order to maximize our effectiveness. Given the program has been underway for over a year and a half the SOMAH PA has insight and understanding around what strategies and tactics are effective for engaging specific audiences. So rather than tracking and measuring particular activities, the objectives and KPIs are designed to allow the SOMAH PA to measure and optimize its impact.

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

As the primary goal of the SOMAH program, this goal 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.

Working with the understanding that a greater proportion of future applications will need to be property owner driven, activities related to achieving Goal 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.

In 2021, the SOMAH PA will focus on diversifying the application pipeline through the prioritization of outreach to affordable housing properties located in DACs, increasing the number of Track A applications and by targeting property owners in areas of IOU territories that the contractor market is not reaching such as non-metropolitan areas. Other segments of this audience that will be targeted with a specialized approach are HUD and USDA property owners, and Tribal Housing Entities. The SOMAH PA will leverage recent requirement modifications that have increased SOMAH eligibility for both HUD and USDA properties as a talking point to engage these property owners and encourage them to join the pipeline of eligible projects. With regard to Tribal Housing Entities, the SOMAH PA will leverage existing relationships with Tribal Housing Authorities to develop a more comprehensive understanding of the affordable housing ownership structure and frequently utilized funding sources to better refine outreach materials and strategies for this audience

Objectives

1. Identify and initiate direct outreach to all property owners with properties in DACs, prioritizing properties in the Central Valley and Los Angeles regions by September 2021.
2. Identify and initiate direct outreach with all 39 Housing Authorities and all 12 Tribal Entities with eligible properties by December 2021.
3. Add at least 50 new property owners to SOMAH mailing list, targeting diverse property owner types and portfolios (i.e. organization type, portfolio size, geographic diversity, etc.) from direct outreach and affordable housing conferences by December 2021.
4. Host eight (8) webinars for property owners with a 50% attendance rate throughout the year, with a prioritization on attendance for property owners with properties located in DACs.
5. Increase website traffic to property owner pages by adding at least five (5) new property owner co-marketing partners in application gap regions by December 2021.
6. Maintain a presence in key statewide and regional affordable housing conferences by participating in two (2) to four (4) conferences with property owners representing the Central Valley, Southern California, and other target populations by December 2021.

Audiences

- Non-profit affordable housing owners
- For-profit affordable housing owners
- Tribal Entities
- Housing Authorities
- Property owners not subscribed to the SOMAH email list
- Property owners subscribed to the SOMAH email list
- Affordable Housing Associations

Key KPIs

- Number of new applications *
- Number of new DAC applications
- Number of properties contacted
- Number of DAC properties contacted
- Number of diverse property owner types contacted
- Share of counties with potentially-eligible properties with applications
- Number of new email subscribers
- Number of new interest calls
- Webinar attendance rate

* KPIs that align with DRAFT third-party evaluator SOMAH Program Metrics Memo

Activities

No.	Activity	Channels/tools	Audience(s)
1.1	Broaden SOMAH audience by adding new property owners to SOMAH email lists	<ul style="list-style-type: none"> CalSOMAH.org Email (Marketo) 	<ul style="list-style-type: none"> Property Owners
1.2	Develop case studies targeted at property owners to illustrate the benefits of SOMAH	<ul style="list-style-type: none"> CalSOMAH.org Email (Marketo) 	<ul style="list-style-type: none"> Property Owners Management Companies Affordable Housing Associations
1.3	Identify and coordinate with new co-marketing partners to market the SOMAH program to their audiences	<ul style="list-style-type: none"> Affordable Housing partner channels Co-marketing toolkit CalSOMAH.org Social media 	<ul style="list-style-type: none"> Property Owners not on email list Housing Authorities not on email list Property management companies Government agencies list
1.4	Conduct webinars and evaluate webinar statistics to optimize outreach strategies	<ul style="list-style-type: none"> GoToWebinar Direct outreach Marketo SOMAH partner channels (AC, CBOs, JTOs) Social media 	<ul style="list-style-type: none"> Property owners in listserv Property owners not in listserv
1.5	Create a list of cities and/or ZIP codes in DACs to support targeted marketing efforts	<ul style="list-style-type: none"> Paid media Search Engine Marketing (SEM) Paid social media 	<ul style="list-style-type: none"> Property owners and managers

1.6	Build an email nurture program for new property owners	<ul style="list-style-type: none"> Marketeto CalSOMAH.org 	<ul style="list-style-type: none"> New property owner subscribers
1.7	Integrate sponsorship opportunities to expand on SOMAH's marketing presence at key industry events	<ul style="list-style-type: none"> Statewide conferences (Housing CA, SCANPH, SDHF) Building Decarbonization Summit Clean Energy Events 	<ul style="list-style-type: none"> Property Owners Management Companies Affordable Housing Associations
1.8	Identify and conduct outreach to diverse property owner organizations	<ul style="list-style-type: none"> Salesforce Direct Outreach 	<ul style="list-style-type: none"> Property owners in listserv Property owners not in listserv

Goal 2: Continue to build a robust and diverse contractor base and support eligible contractor retention

Contractor engagement and diversity remains a key goal for 2021. This goal is also in alignment with recommendations from the Phase 1 SOMAH Program Evaluation Report, which recommend the SOMAH PA develop benchmarks and set year-over-year goals on applicant diversity.

When shelter-in-place orders were enacted throughout California in 2020, new contractor engagement shifted to solely remote outreach. One-on-one phone and email support were provided for contractors with active applications who had questions and concerns related to application timelines and requirements due to complications of COVID-19. For 2021, uncertainty with COVID-19 may require regular messaging updates on the SOMAH website and via email to address contractor needs and concerns.

Direct outreach via phone and email will replace conferences as the primary means for reaching this audience. Outreach will need to be conducted for specific regions in Liberty Utilities, PacifiCorp, and less populated regions in the Central Valley to account for geographic gaps in application volumes and to diversify participation. As the majority of applications in 2020 came from Track B contractor-led applications, increasing the number of SOMAH-eligible contractors in these service territories and regions may increase Track B applications concurrently as local contractors pursue property owners.

SOMAH's Phase 1 Program Evaluation Report also recommended exploring program participation barriers by small contractors through surveys & interviews. The SOMAH PA will continue to build on 2020 efforts to understand barriers to participation through activities for 2021. In 2020, the SOMAH PA conducted a contractors barriers-to-entry survey, which was analyzed and quantified at the end of Q4 2020 and will be used to inform and refine 2021 outreach approaches, particularly for smaller contractors who have demonstrated interest in SOMAH by taking the eligibility training or subscribed to the SOMAH listserv. The SOMAH PA will modify its tactics and messaging to support participation from smaller contractors.

SOMAH will conduct a focus group of current eligible contractors that have identified themselves as representing target diversity metrics: number of employees, number of solar installations, minority-owned businesses, women-owned business, languages offered. Diversity

metrics are self-reported by contractors when submitting their primary contact designation, a program requirement during the eligibility process. In 2020, the SOMAH PA increased the diversity categories for contractors to capture data on the number of LGBTQ+-owned businesses, as well as employee demographics.¹¹

Objectives

1. Identify at least five (5) potential diverse contractors in each IOU or geographic region, with limited contractors and where there are eligible properties (Liberty Utilities, PacifiCorp, Central Valley) by June 2021.
2. Enroll at least one (1) contractor as an eligible contractor per each area identified in Objective 1 above by December 2021.
3. Survey 50% of subcontractors for opportunities to share lessons-learned and address barriers for smaller and diverse contractors by September 2021.
4. Administer barriers to entry survey to all new SOMAH-eligible contractors and achieve a 25% or greater response rate, for continuous analysis of contractor participation needs.
5. Hold one (1) focus group primarily composed of selected diverse and smaller contractors by September 2021.
6. Hold at least five (5) Contractor Eligibility Trainings by the end of November 2021 as smaller contractors are engaged through outreach.
7. Identify and conduct outreach to at least one (1) diverse contractor association by December 2021.

¹¹ Diversity measures were added to 2019 diversity metrics which include: number of employees, number of solar installations, minority-owned businesses, women-owned business, languages offered.

Audiences

- Diverse contractors (women, minority and/or LGBT-owned businesses)
- Contractors with applications
- Potential contractors
- Smaller contractors (25 employees or less)
- Eligible contractors
- Subcontractors

Key KPIs

- Number of new SOMAH-eligible contractors and subcontractors
- Number of new self-identified diverse SOMAH-eligible contractors (women, minority and/or LGBT-owned businesses)
- Number of applications from contractors that had no previous applications through 2020
- Number of applications from diverse contractors that had no previous applications through 2020
- Survey response rate
- Webinar attendance rate

Activities

No.	Activity	Channels/tools	Audience(s)
2.1	Develop and execute a plan for expanding contractor coverage into low coverage areas	<ul style="list-style-type: none">■ Direct emails■ Direct calls	<ul style="list-style-type: none">■ Contractors (All)
2.2	Build an email nurture program for existing contractors	<ul style="list-style-type: none">■ Marketo■ CalSOMAH.org	<ul style="list-style-type: none">■ Contractors in listserv
2.3	Build an email nurture program for new eligible contractors (tied to the training webinars)	<ul style="list-style-type: none">■ Marketo■ CalSOMAH.org	<ul style="list-style-type: none">■ Contractors - after taking eligibility training

2.4	Evaluate and optimize the efficacy of the Eligibility Training Webinars through polls and surveys	<ul style="list-style-type: none"> Barriers to entry survey 1-1 consultations Webinar polls and surveys 	<ul style="list-style-type: none"> Eligible contractors Potential contractors
2.5	Evaluate contractor needs to optimize outreach strategies	<ul style="list-style-type: none"> Barriers to Entry Survey 1-1 consultations Focus group 	<ul style="list-style-type: none"> Potential contractors Eligible contractors Subcontractors
2.6	Conduct contractor focus group of selected diverse and smaller contractors to evaluate experience and barriers to participation	<ul style="list-style-type: none"> SOMAH Contractor Roundtable 	<ul style="list-style-type: none"> Primarily self-identified diverse contractors
2.7	Collect and analyze contractor demographic data	<ul style="list-style-type: none"> Primary contact form 	<ul style="list-style-type: none"> Contractors - after taking eligibility training
2.8	Update contractors on COVID-related program changes	<ul style="list-style-type: none"> Emails CaSOMAH.org 	<ul style="list-style-type: none"> Contractors in listserv
2.9	Pitch media on participating contractor interviews & case studies	<ul style="list-style-type: none"> Direct emails Direct calls 	<ul style="list-style-type: none"> Contractors with applications

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

The SOMAH PA will continue to work closely with its current network of JTOs across the state to develop a pipeline of eligible trainees for SOMAH projects, and to help prepare trainees for SOMAH opportunities and solar careers. The SOMAH PA plans to increase communication frequency with JTOs through quarterly program update emails, regional coordination calls, and opportunities to engage their students in career development workshops. Led by Rising Sun Center for Opportunity, the SOMAH PA will also focus outreach to new JTOs in areas where there are SOMAH projects but few confirmed, eligible JTOs.

This year, the SOMAH PA has set benchmarks for local and targeted hiring for SOMAH job training opportunities – a recommendation from the Phase 1 SOMAH Program Evaluation Report. To achieve this, the SOMAH PA will focus outreach to JTOs that serve the program's priority populations, such as justice system-impacted individuals and those facing other barriers to employment. Additionally, the SOMAH PA is also building out trainee and contractor support services – another recommendation from SOMAH's third party evaluators. This will take the form of connecting JTOs and local contractors through events, meetings, and personal introductions, and the SOMAH PA will support the CBOs in connecting with local JTOs to promote SOMAH job training opportunities and solar career pathways. These efforts will support local and targeted hiring goals.

The SOMAH PA will support SOMAH job trainees and job seekers by developing solar career resources and facilitating workshops to prepare them for SOMAH job training opportunities and solar careers. The SOMAH PA will identify barriers to participation via feedback from the JTO Task Force and job training surveys and will target strategies and outreach materials accordingly.

Contractor use of the SOMAH Job Training Portal has been low in 2020. The SOMAH PA will increase the value of the Job Training Portal for contractors by highlighting the resume bank as a hiring and recruiting tool and encouraging use of the job training organization directory for local hiring. Additionally, the SOMAH PA will survey all approved SOMAH contractors to identify their hiring and workforce needs and job training strategies.

Objectives

1. Engage and confirm the eligibility of at least one new SOMAH-eligible JTO in each county where an active or waitlisted SOMAH project is located by June 2021 and continue to monitor project locations to target new JTOs.
2. Host at least four quarterly career development webinars or workshops for job trainees and job seekers with a 50% attendance rate and targeted event outreach to job seekers in DACs by December 2021.
3. Host at least one safety webinar for job trainees and contractors with a 60% attendance rate by June 2021.
4. Increase page visits to the SOMAH Job Training Portal by 20% from 2020 to December 2021.
5. Increase the percentage of job trainees that have resumes uploaded in the resume bank on the Job Training Portal to 75% by December 2021.
6. Ensure that at least 50% of SOMAH job trainees confirmed in job training affidavits submitted in 2021 are local or targeted hires¹² (defined by the Local and Targeted Hiring Guidelines, Section 2.8.6).
7. Ensure that at least 50% of SOMAH job trainees confirmed in job training affidavits submitted in 2021 live in DACs.
8. Ensure that at least 75% of job training surveys (including job trainees, contractors, and JTOs) are completed within 2021.

¹² For the purposes of SOMAH projects, a local hire is defined as an individual who is domiciled within the county in which the SOMAH project is taking place. A targeted hire may or may not live within the county in which the SOMAH project is taking place. Individuals meeting the targeted hire goal can include residents of disadvantaged communities (per CalEnviroScreen 3.0), affordable housing residents, women, people of color, and other individuals who have faced or who have overcome at least one of the following barriers to employment: being homeless, being a custodial single parent, receiving public assistance, lacking a GED or high school diploma, participating in a vocational English as a second language program, or having a criminal record or other involvement with the criminal justice system.

Audiences

- Contractors
- Job trainees
- Job training organizations (JTOs)
- SOMAH Tenants in potentially-eligible SOMAH properties
- Tenants in participating SOMAH buildings
- Community based organization partners
- Property owners

Key KPIs

- Number of new job trainees signed up on the SOMAH Job Training Portal
- Number of new JTOs on JTO Directory by county
- Percent of SOMAH projects in the same county as a SOMAH-eligible JTO
- Percent of job trainees in DACs
- Percent of JTOs that serve DACs
- Percent of job trainees that are local/targeted hires
- Number of local and targeted trainee hires that obtain full-time positions in the solar industry *
- Number of trainees hired from DACs that obtain full-time positions in the solar industry *
- Number of visits to the SOMAH Job Training Portal
- Webinar attendance rate
- Survey response rate

** KPIs that align with DRAFT third-party evaluator SOMAH Program Metrics Memo*

Activities

No.	Activity	Channels/tools	Audience(s)
3.1	Engage regionally-targeted eligible trainees and JTOs in areas where there are active or waitlisted SOMAH projects.	<ul style="list-style-type: none"> Webinars Direct calls & emails to JTOs JTO presentations Job fairs (remote) CBO partner outreach 	<ul style="list-style-type: none"> Job trainees JTOs
3.2	Develop, distribute, and evaluate resources to support JTOs in promoting SOMAH job training opportunities.	<ul style="list-style-type: none"> Flyers Talking points Presentations Social media posts Website content Surveys 	<ul style="list-style-type: none"> JTOs Job trainees
3.3	Create and distribute resources and host workshops to prepare trainees to successfully participate in SOMAH and access solar careers.	<ul style="list-style-type: none"> Webinars/workshops Job Training Portal Solar career resources 	<ul style="list-style-type: none"> Job trainees
3.4	Engage and educate contractors on job training requirements and develop resources to support contractors in hiring local and targeted trainees for SOMAH projects.	<ul style="list-style-type: none"> Webinars Social media posts Direct emails and connection to local JTOs Job Training Portal 	<ul style="list-style-type: none"> Contractors

		<ul style="list-style-type: none"> Directory of eligible JTOs Solar training and hiring resources 	
3.5	Educate property owners on job training opportunities for tenants.	<ul style="list-style-type: none"> Webinars Direct emails 	<ul style="list-style-type: none"> Property owners
3.6	Develop and evaluate resources to support CBOs in promoting SOMAH job training opportunities and SOMAH JTOs to the general community.	<ul style="list-style-type: none"> Presentation slide decks Talking points Job Training Portal Direct emails to connect CBOs and local JTOs 	<ul style="list-style-type: none"> CBOs JTOs Job trainees
3.7	Develop and distribute solar jobsite safety resources for job trainees and contractors and host safety webinars to ensure the safety of all participants on SOMAH installations.	<ul style="list-style-type: none"> Webinars/workshops Safety resources 	<ul style="list-style-type: none"> Contractors Job trainees Tenants
3.8	Identify contractor hiring trends and workforce needs.	<ul style="list-style-type: none"> Surveys Focus groups 	<ul style="list-style-type: none"> Contractors
3.9	Evaluate job trainee experience and identify barriers to participation.	<ul style="list-style-type: none"> Surveys JTO Task Force 	<ul style="list-style-type: none"> Job trainees JTOs
3.10	Elevate job training success stories in community news media to reach prospective trainees and JTOs and highlight success of the program.	<ul style="list-style-type: none"> Media 	<ul style="list-style-type: none"> Job seekers Interested stakeholders

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

The primary objective of tenant education is to ensure tenants living in potentially-eligible SOMAH buildings and tenants living in buildings participating in SOMAH are aware of and able to benefit from SOMAH in an equitable manner. This means continuing to work closely with CBOs to engage with tenants and support tenant education around SOMAH's benefits.

In 2020, the COVID-19 pandemic and subsequent shelter-in-place orders required the SOMAH PA and its CBO partners to reassess and update tenant outreach activities and messaging to account for the changing needs and priorities of tenants, including economic recovery support, rent policies, and COVID-19 safety information. In 2021, CBOs will continue to assess and modify messaging and prioritize activities that: support potential SOMAH tenants in advocating for SOMAH for their properties; provide tenants with resources to be competitive applicants for SOMAH job training opportunities; support property owners in reaching their tenant education requirements; and improve tenant education materials.

Additionally, the SOMAH PA will continue its work with IOU partners to co-market energy savings/assistance programs, and help tenants understand their SOMAH energy bills. ESA referrals are already required by the program, and the PA is directed to coordinate with the IOUs to meet this requirement and co-market SOMAH with existing energy assistance and efficiency programs as part of our ongoing outreach to tenants.

CBO partners will continue to support property owners and contractors fulfill tenant education requirements by finalizing and deploying pilot train-the-trainer workshops to help them effectively and equitably reach tenants in ways and languages they understand. Additionally, the SOMAH PA and CBO partners will pilot a series of tenant education workshops and services to support property owners in meeting their tenant education requirements. The SOMAH PA will also be developing a tenant engagement toolkit for contractors to help ensure safety of both tenants and contractors during solar installation.

Finally, in order to assess the effectiveness of tenant education materials and strategies, the SOMAH PA will deploy surveys and other evaluation activities. This will include a suite of surveys to tenants in the form of mailers, and focus groups/interviews, if deemed safe. These

activities were delayed due to the COVID-19 pandemic and have been modified to account for health and safety measures for all participants. Through surveys, the SOMAH PA intends to understand:

- Whether current tenant education requirements for property owners are adequately preparing tenants for SOMAH solar projects and informing them about the benefits they can receive (i.e., bill credits, IOU energy efficiency and bill reduction programs, and job training opportunities, etc.)
- How to improve upon methods for conducting tenant education and evaluating what information is most relevant/not as relevant

Objectives

1. Leverage SOMAH CBO and JTO partnerships to ensure at least 5% of SOMAH job training opportunities go to tenants.
2. Conduct one (1) Tenant Education train-the-trainer webinar for property owners, contractors, and CBOs, hosted by the SOMAH PA, with a 50% attendance rate by December 2021.
3. Provide (pilot) Tenant Education Services for two (2) properties to help them fulfil their second tenant education requirement, by December 2021.
4. Develop and launch a new onsite tenant safety toolkit for contractors, and ensure that at all contractors use it or a functional equivalent based on both downloads of toolkit and surveys by Q3 2020.
5. Conduct at least one (1) pilot tenant education survey evaluation for at least one completed SOMAH project/property by March 2021.
6. Conduct one pilot tenant education focus group by June 2021.
7. Conduct at least five (5) pilot tenant education interviews with tenants living in a SOMAH property by September 2021.
8. Ensure that at least 75% of job training surveys (including job trainees, contractors, and JTOs) are completed within 2021.

Audiences

- Potentially-eligible SOMAH tenants
- Tenants in SOMAH-participating buildings
- Contractors conducting tenant education on behalf of the property owner
- Property owners
- Community-based organization partners
- IOUs
- Stakeholders
- Property owners

Key KPIs

- Number of tenant education workshop conducted
- Number of tenants who enroll in energy savings/assistance programs
- Number and share of tenants who participate in SOMAH job training opportunities
- Number of TE survey responses and response rate
- Number of TE surveys, focus groups, and interviews indicating TE effectiveness
- Number of calls to the TE hotline, and share of inquiries successfully fielded
- Webinar attendance rate

Activities

No.	Activity	Channels/tools	Audience(s)
4.1	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

4.2	Educate participating property owners and contractors about tenant engagement and prepare them to comply with tenant education requirements	<ul style="list-style-type: none"> Workshops Newsletters Email blasts 	<ul style="list-style-type: none"> Property Owners Contractors CBOs
4.3	Pilot CBO and PA facilitated Tenant Education service remotely/in-person tenant workshop to support second TE Requirement	<ul style="list-style-type: none"> Workshops Flyers Emails 	<ul style="list-style-type: none"> Tenants in SOMAH buildings
4.4	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
4.5	Create a robust contractor toolkit to ensure tenants living in a SOMAH building are able to take advantage of the job training opportunities	<ul style="list-style-type: none"> Workshops Newsletters Email blasts 	<ul style="list-style-type: none"> Tenants in SOMAH buildings
4.6	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
4.7	Coordinate with existing (IOU) programs that marketto tenants about energy savings/assistance programs and job training opportunities	<ul style="list-style-type: none"> Emails 	<ul style="list-style-type: none"> Tenants in SOMAH buildings

		<ul style="list-style-type: none"> Coordination meetings 	
4.8	Continue to 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"> Print materials: (<i>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</i>) 	<ul style="list-style-type: none"> Tenants in SOMAH buildings
4.9	Continue to 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: (<i>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</i>) 	<ul style="list-style-type: none"> Tenants in SOMAH buildings Property Owners CBOs IOUs
4.10	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
4.11	Staff and optimize multilingual tenant hotline to answer questions with pre-recorded 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 building

4.12	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
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Goal 5: Ensure stakeholders are informed of and helping to co-market 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 2020, tactics focused on engaging with those who were already familiar with SOMAH as well as government and legislative officials whose constituents are in DACs. 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 and cold outreach to government offices in DACs. In 2021, the SOMAH PA is continuing its tactics to reach new stakeholders who have minimal familiarity with SOMAH to educate them about how it can benefit their community.

The SOMAH PA will 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 also conduct direct outreach as projects are completed and SOMAH success stories can be shared. In 2020, the COVID-19 pandemic extended project timelines, which limited project completions to only one completed project by the end of 2020.

Objectives

1. Identify and conduct direct outreach to at least 100 government and legislative offices in DACs where there are identified eligible properties that have not applied by December 2021.
2. Develop and distribute semi-annual progress reports stats twice annually to the Low-Income Oversight Board, the DAC Advisory Group, to inform these stakeholders of program metrics and progress on DAC metrics.
3. Identify and conduct direct outreach to 25 government and legislative offices whose jurisdictions have had SOMAH project completions by December 2021.
4. Initiate at least two co-branding or co-marketing with IOU multifamily energy efficiency programs.
5. Initiate co-branding or co-marketing with all operating CCAs by December 2021.

Audiences

- Investor-owned utilities (IOUs)
- Community Choice aggregators (CCAs)
- State government and legislative officials
- Local governments
- California Public Utilities Commission (CPUC)

Key KPIs

- Number of engaged stakeholders (i.e. local government) in database
- Number and reach of co-marketing partnerships

Activities

No.	Activity	Channels/tools	Audience(s)
5.1	Conduct quantifiable remote outreach to stakeholders	<ul style="list-style-type: none">▪ Salesforce▪ Direct emails▪ Marketo	<ul style="list-style-type: none">▪ Government and legislative officials in DACs▪ CCAs
5.2	Personalize outreach materials to stakeholder needs	<ul style="list-style-type: none">▪ Meetings or remote presentations	<ul style="list-style-type: none">▪ Government and legislative officials in DACs▪ CCAs
5.3	Complete impact stories for stakeholder outreach	<ul style="list-style-type: none">▪ Social media▪ Direct emails▪ SOMAH program partners (AC, CBOs, JTOs)	<ul style="list-style-type: none">▪ Government and legislative officials in DACs▪ SOMAH program partners (AC, CBOs, JTOs)

		<ul style="list-style-type: none"> CalSOMAH.org 	
5.4	Invite stakeholders to Public Forums	<ul style="list-style-type: none"> Marketo Direct email 	<ul style="list-style-type: none"> Stakeholders in listserv Government and legislative officials in DACs CCAs
5.5	Evaluate and update co-marketing toolkit	<ul style="list-style-type: none"> CalSOMAH.org Partner toolkit 	<ul style="list-style-type: none"> Stakeholders
5.6	Develop a SOMAH community impact page	<ul style="list-style-type: none"> CalSOMAH.org 	<ul style="list-style-type: none"> Stakeholders
5.7	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
5.8	Engage IOU multifamily energy efficiency programs to support co-marketing	<ul style="list-style-type: none"> Direct emails Partner toolkit 	<ul style="list-style-type: none"> Potential partners: <ul style="list-style-type: none"> Energy Upgrade California Multifamily Program (EUC MF) Energy Efficiency Multifamily Financing Pilot Programs Low-Income Weatherization Program (LIWP)

Evaluation and Reporting

Since SOMAH's launch in July 2019, the SOMAH PA has been collecting data on program metrics and key performance indicators (KPIs) outlined in annual ME&O Plans. Given the 2019 program year only provided six months of program data, the intention for 2020 was to capture a program "baseline" as the first full calendar year of the program. However, beginning in March 2020, the COVID-19 pandemic impacted the SOMAH PA's ability to conduct ME&O activities as planned. The SOMAH PA was able to shift its outreach and collect data on ME&O KPIs -- the outcomes of which have been highlighted in the *2020 Marketing, Education and Outreach in Review* section of this plan. Additional reporting on key program metrics can be found in the [Semi-Annual Progress Report](#) for the June – December 2020 reporting period. The SOMAH PA also continues to assess its KPIs, data collection and evaluation methods. This has led to a shift in KPI structure for the 2021 ME&O report: rather than providing individual KPIs by activity, a set of KPIs are established for each ME&O goal to more directly assess the SOMAH PA's success in achieving each goal.

Over the course of 2021, 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 gaining better insights about the program's progress. In addition to quantitative assessments of KPIs and metrics, the SOMAH program uses audience and participant engagement opportunities to assess program impact, gaps, and challenges. In 2021, surveys for contractors and property owners will be disseminated in order to understand barriers to entry, reasons for dropout at different points and overall satisfaction with their experience and SOMAH's services. As SOMAH projects become completed and receive interconnection, surveys for tenants and job trainees will be deployed in order to better understand their experience in participating in SOMAH and receiving information about SOMAH's benefits. These surveys and their methodology will be standardized but will account for different outreach needs and approaches of each target audience.

The SOMAH PA will also continue to gather feedback through workshops and quarterly public forums to improve upon our ME&O approaches and the SOMAH program overall. SOMAH's Advisory Council and Job Training Organization Task Force will continue to provide guidance and oversight of the program's implementation, which includes ME&O strategies. Together, feedback and input from our key audiences, participants, 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.

Verdant, SOMAH's independent third-party evaluator, published their Phase 1 Evaluation Report in September 2020. This evaluation has also helped to assess and inform SOMAH's

ME&O strategies and tactics, for 2021. For example, in response to Verdant's findings and recommendations the SOMAH PA is taking the following steps:

- Reviewing the program's marketing materials to ensure that there is no ambiguity in the definition and characterization of DACs
- Setting internal benchmarks on DAC-resident job trainees and DAC Job Training Organization (JTO) participation as a percentage of all job trainees and JTOs in the program
- Deploying surveys to help inform how to decrease barriers to participation from smaller contractors, and how ME&O activities can support this
- Setting targets and benchmarks for DAC properties and property owner diversity in the 2021 ME&O Plan

Finally, the SOMAH program has been coordinating and will continue to coordinate with Verdant on program evaluation, getting their input on survey design and methodology to create better alignment between our respective evaluation strategies.



Appendix: Budget by Month and Category

2021 SOMAH ME&O Plan Budget (Forecast)

Total Labor, 2021

Total Labor	\$1,907,129
Total Non-Labor	\$805,654
Grand Total	\$2,712,784

Q1 2021

Category	Subtask	January		February		March	
		Labor	Non-Labor	Labor	Non-Labor	Labor	Non-Labor
Marketing and Outreach	ME&O Admin	\$45,287.50	--	\$51,985.12	--	\$52,916.40	--
Marketing and Outreach	Website Development & Enhancements	\$6,913.50	\$200.00	\$9,011.96	\$200.00	\$6,852.77	\$200.00
Marketing and Outreach	Community Based Organization	\$14,889.80	--	\$14,542.31	\$203,026.00	\$17,819.67	--
Marketing and Outreach	Cooperative Marketing Efforts	\$8,390.60	--	\$4,882.86	--	\$8,320.20	--
Marketing and Outreach	Conferences	\$610.41	--	\$292.46	--	\$942.50	\$3,200.00
Marketing and Outreach	Tenant Engagement	\$7,546.50	\$1,450.00	\$7,574.41	--	\$7,989.13	\$800.00
Marketing and Outreach	Property Owner Engagement	\$24,454.71	\$2,500.00	\$24,764.95	\$2,500.00	\$24,479.92	\$2,782.00
Marketing and Outreach	Contractor Engagement	\$6,663.30	--	\$7,169.73	--	\$6,720.26	--
Marketing and Outreach	Contractor Training	\$3,009.93	--	\$2,777.43	--	\$3,009.93	--
Marketing and Outreach	Marketing Collateral Development	\$2,646.66	--	\$3,025.35	--	\$2,679.95	\$1,000.00
Marketing and Outreach	Communications	\$5,814.03	\$175.00	\$7,438.02	\$175.00	\$4,933.48	\$175.00
Marketing and Outreach	Media	\$2,416.52	--	\$2,416.52	--	\$2,763.64	--
Marketing and Outreach	ME&O Plan Development	\$4,471.74	--	\$2,295.08	--	--	--
Workforce Development	Cooperative Marketing Efforts	\$2,139.73	--	\$1,959.21	--	\$2,288.25	--
Totals		\$135,254.93	\$4,325.00	\$140,135.41	\$205,901.00	\$141,716.10	\$8,157.00
Q1 Total		\$ 635,489					



Q2 2021

Category	Subtask	April		May		June	
		Labor	Non-Labor	Labor	Non-Labor	Labor	Non-Labor
Marketing and Outreach	ME&O Admin	\$55,286.97	--	\$51,932.71	--	\$55,286.97	--
Marketing and Outreach	Website Development & Enhancements	\$7,970.96	\$200.00	\$9,818.14	\$200.00	\$9,845.81	\$200.00
Marketing and Outreach	Community Based Organization	\$19,268.22	--	\$17,819.67	\$167,000.00	\$19,268.22	--
Marketing and Outreach	Cooperative Marketing Efforts	\$8,874.00	--	\$6,406.91	--	\$8,957.18	--
Marketing and Outreach	Conferences	\$6,341.12	\$5,750.00	\$81.75	\$1,500.00	\$3,878.96	--
Marketing and Outreach	Tenant Engagement	\$7,709.85	--	\$7,151.29	\$800.00	\$7,709.85	\$10,000.00
Marketing and Outreach	Property Owner Engagement	\$31,903.01	\$2,500.00	\$25,004.75	\$2,500.00	\$29,412.24	\$2,782.00
Marketing and Outreach	Contractor Engagement	\$12,584.23	\$2,500.00	\$10,570.79	--	\$11,335.88	\$2,500.00
Marketing and Outreach	Contractor Training	\$3,724.89	--	\$3,724.89	--	\$3,724.89	--
Marketing and Outreach	Marketing Collateral Development	\$5,162.14	--	\$2,445.84	--	\$2,601.91	--
Marketing and Outreach	Communications	\$5,653.09	\$175.00	\$7,518.64	\$175.00	\$5,648.44	\$175.00
Marketing and Outreach	Media	\$2,660.76	--	\$2,455.01	--	\$2,660.76	--
Marketing and Outreach	ME&O Plan Development	\$0.00	--	--	--	--	--
Workforce Development	Cooperative Marketing Efforts	\$2,188.76	--	\$1,989.78	--	\$2,188.76	--
Totals		\$169,328.02	\$11,125.00	\$146,920.16	\$172,175.00	\$162,519.89	\$15,657.00
Q2 Total		\$ 677,725					



Q3 2021

Category	Subtask	July		August		September	
		Labor	Non-Labor	Labor	Non-Labor	Labor	Non-Labor
Marketing and Outreach	ME&O Admin	\$55,781.69	--	\$62,836.97	--	\$54,231.69	--
Marketing and Outreach	Website Development & Enhancements	\$10,578.19	\$200.00	\$9,845.81	\$200.00	\$7,952.47	\$200.00
Marketing and Outreach	Community Based Organization	\$16,560.06	--	\$17,189.86	\$167,000.00	\$16,560.06	--
Marketing and Outreach	Cooperative Marketing Efforts	\$9,437.78	--	\$6,451.18	--	\$9,937.45	\$800.00
Marketing and Outreach	Conferences	\$3,283.13	\$750.00	\$5,381.92	\$1,500.00	\$9,557.68	\$8,200.00
Marketing and Outreach	Tenant Engagement	\$7,430.57	\$800.00	\$7,709.85	--	\$7,430.57	\$800.00
Marketing and Outreach	Property Owner Engagement	\$31,020.15	\$2,500.00	\$29,672.84	\$2,500.00	\$30,768.27	\$2,782.00
Marketing and Outreach	Contractor Engagement	\$10,637.76	--	\$10,704.73	\$2,500.00	\$10,637.76	--
Marketing and Outreach	Contractor Training	\$3,724.89	--	\$3,724.89	--	\$3,724.89	--
Marketing and Outreach	Marketing Collateral Development	\$2,523.87	--	\$2,601.91	--	\$4,389.42	\$1,000.00
Marketing and Outreach	Communications	\$5,653.09	\$175.00	\$5,653.09	\$175.00	\$5,653.09	\$175.00
Marketing and Outreach	Media	\$2,557.89	--	\$3,655.72	--	\$3,179.74	--
Marketing and Outreach	ME&O Plan Development	--	--	\$3,198.88	--	\$9,689.45	--
Workforce Development	Cooperative Marketing Efforts	\$2,089.27	--	\$2,188.76	--	\$2,089.27	--
Totals		\$161,278.33	\$4,425.00	\$170,816.42	\$173,875.00	\$175,801.80	\$13,957.00
Q3 Total		\$ 700,154					

Q4 2021

Category	Subtask	October		November		December	
		Labor	Non-Labor	Labor	Non-Labor	Labor	Non-Labor
Marketing and Outreach	ME&O Admin	\$51,726.41	--	\$50,726.41	--	\$52,836.97	--
Marketing and Outreach	Website Development & Enhancements	\$7,938.64	\$200.00	\$7,938.64	\$200.00	\$7,966.31	\$200.00
Marketing and Outreach	Community Based Organization	\$15,930.25	--	\$15,930.25	\$167,000.00	\$17,189.86	--
Marketing and Outreach	Cooperative Marketing Efforts	\$9,042.53	\$800.00	\$6,406.91	\$800.00	\$8,330.68	\$800.00
Marketing and Outreach	Conferences	\$7,995.10	\$1,400.00	\$582.95	\$900.00	\$591.12	\$400.00
Marketing and Outreach	Tenant Engagement	\$7,151.29	--	\$7,151.29	\$800.00	\$7,709.85	\$10,000.00
Marketing and Outreach	Property Owner Engagement	\$32,400.70	\$2,500.00	\$28,037.25	\$2,500.00	\$27,319.84	\$2,782.00
Marketing and Outreach	Contractor Engagement	\$11,913.73	\$2,500.00	\$10,570.79	--	\$10,704.73	\$2,500.00
Marketing and Outreach	Contractor Training	\$3,724.89	--	\$3,724.89	--	\$3,724.89	--
Marketing and Outreach	Marketing Collateral Development	\$4,966.39	--	\$2,445.84	--	\$3,854.91	--
Marketing and Outreach	Communications	\$5,653.09	\$175.00	\$5,653.09	\$175.00	\$5,653.09	\$175.00
Marketing and Outreach	Media	\$3,449.97	--	\$2,455.01	--	\$3,161.96	--
Marketing and Outreach	ME&O Plan Development	\$24,010.74	--	\$20,096.38	--	\$7,456.74	--
Workforce Development	Cooperative Marketing Efforts	\$1,989.78	--	\$1,989.78	--	\$2,188.76	--
Totals		\$187,893.50	\$7,575.00	\$163,709.47	\$172,375.00	\$158,689.73	\$16,857.00
Q4 Total		\$ 707,100					