



Solar on Multifamily
Affordable Housing

2022 Marketing, Education & Outreach Plan





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About the SOMAH Marketing, Education, & Outreach Plan

This marketing, education, and outreach (ME&O) plan will guide activities by the SOMAH Program Administrator (PA) team to reach its priority populations and support the overall program goals for 2022. This plan builds off the activities and learnings from the program's launch in 2019 and subsequent ME&O plans, with updated strategies and efforts to address program gaps, challenges, and opportunities to achieve program goals.

About the SOMAH Program

The SOMAH Program, launched on July 1, 2019, provides financial incentives for installing solar photovoltaic (PV) energy systems on multifamily affordable housing. SOMAH's 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 PA,¹ a team of nonprofit organizations that act as a single entity and provide a host of no-cost services to maximize community benefit and participation. Services include comprehensive technical assistance for property owners, tenant education resources, and job training. An Advisory Council and Job Training Organization (JTO) Task Force provide input into

¹The SOMAH Program Administrator team comprises the Association for Energy Affordability (AEA), Center for Sustainable Energy (CSE), GRID Alternatives (GRID), and California Housing Partnership Corporation (CHPC), in addition to subcontracted organizations that include Rising Sun Energy Center and rotating community-based organizations.



program development and ensure the program maximizes benefits to the communities it serves. See the [SOMAH Program Handbook](#) and the [Semi-Annual Progress Report \(SAPR\)](#) for more detailed information about the program and its requirements.

In addition to fostering a robust pipeline of program applications, the ME&O strategies focus on prioritizing [disadvantaged communities](#) (DAC)² 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.

² Defined as the top 25% most pollution-burdened census tracts within CalEnviroScreen [SB 535 Disadvantaged Communities | OEHA \(ca.gov\)](#)



2021 Marketing, Education, & Outreach in Review

In 2021 the SOMAH PA adapted its ME&O efforts to address the continuing impacts of events that occurred in 2020: the COVID-19 pandemic, a resurgence of pivotal civil rights movements, and an unprecedented wildfire season across the Western United States. The SOMAH PA continued to refine its messaging and communications, being mindful of and responsive to the shifting attention, priorities, and needs of each of its audiences.

Although the SOMAH PA continued to keep most of its ME&O efforts online, the team safely resumed some limited in-person engagement, including SOMAH's first ribbon cutting event, as well as three days of tenant education.

The SOMAH PA also focused on developing solutions to bridge gaps in underrepresented populations in the program. This resulted in the recruitment of additional trusted messengers to expand SOMAH's community-based organization (CBO) partnership program and to leverage regional and local government stakeholder networks to co-market the program given SOMAH's potential import in regional and local sustainability, energy, and climate action plan efforts. These relationships are intended to increase awareness about SOMAH and provide credibility to the program through partnerships with trusted and existing entities administering related programs. Furthermore, the SOMAH PA launched a Solar 101 training aimed at educating affordable housing professionals on the solar installation process and project considerations. The Solar 101 training will continue to be held on an annual basis. Lastly, the SOMAH PA conducted two focus groups in 2021, with both contractors and property owners to ascertain barriers to participation and retention and identify opportunities to build the SOMAH pipeline.

Below is a more detailed review of the 2021 ME&O activities by goal and their related objectives.

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

Objective	Outcomes
<p>Overall progress-to-goal</p>	<ul style="list-style-type: none"> ● Applications submitted in 2021: <ul style="list-style-type: none"> ○ 170 applications ○ 32.97 MW ○ 12,742 tenant units ● Total active applications: <ul style="list-style-type: none"> ○ 482 applications ○ 83.68 MW ○ 39,160 tenant units ● New applications may not have met Reservation Request Approval, where data is validated ● For further information, please refer to 2022 January SAPR. ● New applications may not have met Reservation Request Approval, where data is validated ● For further information, please refer to 2022 January SAPR.
<p>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</p>	<ul style="list-style-type: none"> ● 70 owners in DACs contacted. ● 435 DAC properties contacted: <ul style="list-style-type: none"> ○ 131 Central Valley properties contacted ○ 118 Los Angeles region properties contacted ● Ran paid media campaigns on Facebook and LinkedIn targeting property owners with properties in DACs by ZIP code: <ul style="list-style-type: none"> ○ LinkedIn: 775 website visits, 185k+ impressions³ ○ Facebook: 692 link clicks, 75k+ impressions
<p>Identify and initiate direct outreach with all 39 housing authorities and all 12 tribal entities with eligible properties by December 2021</p>	<ul style="list-style-type: none"> ● 45 housing authorities contacted ● 13 tribal entities contacted. ● Met with CPUC tribal liaison to increase understanding of community needs and discuss tactics for increasing tribal participation in SOMAH

³ Refers to the number of times a particular piece of content (video, blog, image, etc.) has been viewed [Media Impression — TOP Agency](#)



<p>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</p>	<ul style="list-style-type: none"> ● 41 total new subscribers ● Moving forward, the SOMAH PA will promote the email listserv through a variety of activities such as encouraging property owners to subscribe to the mailing list during interest calls and conferences, including the mailing list sign-up form in SOMAH webinars, and encouraging enrolled SOMAH applicants to subscribe to the mailing list.
<p>Host 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</p>	<ul style="list-style-type: none"> ● The following webinars were hosted: <ul style="list-style-type: none"> ○ Progress Payment Pathway (60% attendance rate) ○ Green Talk: SOMAH Overview with SHE (25% attendance rate) ○ Green Talk: SOMAH Overview with EHC (66% attendance rate) ○ Green Talk: Resources for Bill Savings, Resiliency, and Building Electrification – Southern California (54% attendance rate) ○ Solar 101 Institute: Intro to Solar PV for Multifamily Housing (42.42% attendance rate) ○ Solar 101 Institute: Resources for Multifamily Affordable Housing (44% attendance rate) ○ Upfront Technical Assistance Webinar (41 % attendance rate) ○ Financial Technical Assistance Basics: Know Your Solar Options (50% attendance rate) ○ Average attendance rate for the 8 webinars held was 47.8%
<p>Increase website traffic to property owner pages by adding at least 5 new property owner co-marketing partners in application gap regions by December 2021</p>	<ul style="list-style-type: none"> ● Established co-marketing relationships with the following organizations: <ul style="list-style-type: none"> ○ San Joaquin Valley Housing Collaborative ○ California Coalition of Rural Housing ○ Stewards of Affordable Housing for the Future ○ Kennedy Commission ○ BQuest Foundation ○ Enterprise Community Partners - Los Angeles ○ Rural Community Assistance Corporation ○ California Housing Consortium ○ California Council for Affordable Housing ● Main webpage for property owners had a significant increase in web traffic: <ul style="list-style-type: none"> ○ 2,100 + pageviews, 89% increase from FY 2020:



	<ul style="list-style-type: none"> ■ 1,700 + unique pageviews ■ Average session time of 02:49, 26% increase from FY 2020
<p>Maintain a presence in key statewide and regional affordable housing conferences by participating in 2-4 conferences with property owners representing the Central Valley, Southern California, and other target populations by December 2021</p>	<ul style="list-style-type: none"> ● Participated in the following conferences: <ul style="list-style-type: none"> ○ Housing California Virtual (Un)Conference ○ San Joaquin Valley Affordable Housing Summit: How Grid Resiliency Creates a Secure and Sustainable Future (Panel) ○ California Council for Affordable Housing conference ○ California Coalition for Rural Housing Affordable Housing Summit ○ Housing Santa Barbara Day ○ Southern California Association of Nonprofit Housing Conference: The Economic of Building Decarbonization (Panel)

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

Objective	Outcomes
<p>Identify at least 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</p>	<ul style="list-style-type: none"> ● Sent direct emails and made phone calls to all contractors in the following areas: <ul style="list-style-type: none"> ○ Central Valley - 20 ○ Liberty Utilities - 5 ○ PacifiCorp - 8 ● The SOMAH PA has reached out to 33 contractors across the 3 priority geographic gap territories; however, contractor diversity and demographic information is obtained during the contractor eligibility process and cannot be reported on at this time for these contractors. All contractors appear to be small-sized companies (25 or less employees). ● Please see Goal 2 overview section below for recruitment tactics
<p>Enroll at least 1 contractor as an eligible contractor per each area identified in Objective 1 above by December 2021</p>	<ul style="list-style-type: none"> ● Number of new enrolled eligible contractors: <ul style="list-style-type: none"> ○ Central Valley - 1 ○ Liberty Utilities - 0 ○ PacifiCorp - 0
<p>Survey 50% of subcontractors for opportunities to share lessons learned and address barriers for smaller and diverse contractors by September 2021</p>	<ul style="list-style-type: none"> ● Survey efforts not completed due to quality of data obtained during contractor focus groups (versus online surveys), as well as small sample size of 6 subcontractors. ● One-on-one interviews will replace surveys to obtain qualitative data for increases in subcontractor participation. These conversations are intended to help SOMAH better understand the needs of contractors to remain subcontractors or become primary applicants.
<p>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</p>	<ul style="list-style-type: none"> ● 22% response rate from 186 contractor companies that had attended the eligibility training ● 20 completed responses and 20 partial responses ● Marketing efforts included emails through listserv, direct emails, and phone calls



<p>Hold 1 focus group primarily composed of selected diverse and smaller contractors by September 2021</p>	<ul style="list-style-type: none"> ● Conducted 2 on Sept. 13 & 14 ● 6 contractors participated: <ul style="list-style-type: none"> ○ 5 small-sized companies ○ 1 small and minority owned⁴ company
<p>Hold at least 5 Contractor Eligibility Trainings by the end of November 2021 as smaller contractors are engaged through outreach</p>	<ul style="list-style-type: none"> ● Dates held: <ul style="list-style-type: none"> ○ January 20 ○ March 16 ○ May 12 ○ July 8 ○ September 14 ○ December 9
<p>Identify and conduct outreach to at least 1 diverse contractor association by December 2021</p>	<ul style="list-style-type: none"> ● Reached out via emails and calls to 38 diverse contractor associations ● Associations have been unresponsive or solar contractors were not in association databases. Continuing outreach until an advertising opportunity is secured. ● Secured a featured article in Solar Builder Magazine on June 10th edition. Effort led to 4 new contractors and 7 total visiting CalSOMAH.org.

⁴ Per [General Order 156](#): "Women-owned" is a business at least 51% owned by one or more women, and whose management and daily business operations are controlled by one or more women. "Minority-owned" is a business at least 51% owned by one or more minority individuals, and whose management and daily operations are controlled by one or more minority individuals. Recognized minorities include Asian Americans, African Americans, Hispanic Americans and Native Americans, among others. "LGBT-owned" is a business at least 51% owned by a lesbian, gay, bisexual, or transgender person or persons and whose management and daily operations are controlled by one or more of those individuals

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

Objective	Outcomes
<p>Engage and confirm the eligibility of at least 1 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</p>	<ul style="list-style-type: none"> ● 9 new JTOs added to the <u>JTO directory</u> ● 19.5% of active SOMAH projects have no confirmed SOMAH-eligible JTO in the same county ● Counties with limited JTO engagement: <ul style="list-style-type: none"> ○ Calaveras ○ Colusa ○ El Dorado ○ Glenn ○ Plumas ○ Siskiyou ○ Tuolumne ● 100% of completed projects that submitted the job training affidavit with the Incentive Claim in 2021 met all job training requirements.
<p>Host at least 4 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</p>	<ul style="list-style-type: none"> ● Interview Workshop - March 10: <ul style="list-style-type: none"> ○ 19 attendees (63.33% attendance) ○ 13 volunteers ● Job Training Overview Webinar for Contractors - October 14 <ul style="list-style-type: none"> ○ 6 attendees (42.8% attendance) ● Fair Chance Hiring Workshop for Solar Employers - November 17: <ul style="list-style-type: none"> ○ 37 attendees (59.7% attendance) ● Know Your Employment Rights Workshop - December 16 <ul style="list-style-type: none"> ○ 6 attendees (28.6% attendance) ● In addition to holding four job training webinars in 2021, the SOMAH PA also focused on developing career resources, including job preparation tips, an online training curriculum, and a JTO-employer engagement toolkit.
<p>Host at least 1 safety webinar for job trainees and contractors with a 60% attendance rate by June 2021</p>	<ul style="list-style-type: none"> ● No safety webinars were held in 2021 due to competing SOMAH PA priorities. However, the SOMAH PA continues to promote safety on SOMAH projects through Contractor and Applicant Eligibility Trainings, Public Forums, and



	<p>direct job trainee communications. Safety resources will continue to be developed and launched in 2022.</p>
<p>Increase page visits to the SOMAH Job Training Portal by 20% from 2020 to December 2021</p>	<ul style="list-style-type: none"> ● 44.96% decrease in page visits from 2020 to 2021: <ul style="list-style-type: none"> ○ 803 of page visits in 2020 ○ 442 of page visits in 2021 ● The SOMAH PA will focus efforts on continued engagement of job trainees in 2022 through increased communication and resources offered to increase use of the Job Training Portal.
<p>Increase the percentage of job trainees that have resumes uploaded in the resume bank on the Job Training Portal to 75% by December 2021</p>	<ul style="list-style-type: none"> ● There was a 54% increase of job trainees that have resumes uploaded in the resume bank 2020 to 2021.
<p>Ensure that at least 50% of SOMAH job trainees confirmed in job training affidavits submitted in 2021 are local or targeted hires (defined by the Local and Targeted Hiring Guidelines, Section 2</p>	<ul style="list-style-type: none"> ● 93.33% of hired job trainees were local or targeted hires
<p>Ensure that at least 50% of SOMAH job trainees confirmed in job training affidavits submitted in 2021 live in DACs</p>	<ul style="list-style-type: none"> ● 26.67% of hired job trainees live in DACs
<p>Ensure that at least 75% of job training surveys (including job trainees, contractors, and JTOs) are completed within 2021</p>	<ul style="list-style-type: none"> ● No surveys have been sent out in 2021 due to the limited number of projects that have reached the Incentive Claim milestone in 2021. The SOMAH PA will collect job training surveys in 2022 for all completed projects to date.

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

Objective	Outcomes
Leverage SOMAH CBO and JTO partnerships to ensure at least 5% of SOMAH job training opportunities go to tenants	<ul style="list-style-type: none"> • In 2021, 11 SOMAH job training opportunities were obtained by tenants • The SOMAH PA implemented the Tenant Education (TE) Services to ensure tenants are aware of and able to take advantage of job training opportunities on their property.
Conduct 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	<ul style="list-style-type: none"> • Conducted 4 Tenant Education Training Webinars 58 attendees and 54% attendance rate.
Provide (pilot) Tenant Education Services for 2 properties to help them fulfill their second tenant education requirement, by December 2021	<ul style="list-style-type: none"> • Conducted 4 tenant education workshops (for 1 property) • 25 residents attended • A second property was also engaged around TE Services, however, the property owner decided not to move forward as they preferred to conduct tenant education on their own. • The SOMAH PA has received and processed 5 TE Services requests.
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 2021	<ul style="list-style-type: none"> • Tenant safety toolkit was added to the contractor safety binder.
Conduct at least 1 pilot tenant education survey evaluation for at least 1 completed SOMAH project/property by March 2021	<ul style="list-style-type: none"> • Due to eligible properties status TE evaluations were pushed to December 2021, to ensure tenants were in SOMAH completed projects and had received at least 3 tenant VNEM bills before being surveyed. • 30 tenant education evaluations were sent to tenants via USPS.
Conduct 1 pilot tenant education focus group by June 2021	<ul style="list-style-type: none"> • Due to COVID-19 delays in project completion, the SOMAH PA has postponed focus groups until 2022.



Conduct at least 5 pilot tenant education interviews with tenants living in a SOMAH property by September 2021

- Due to COVID-19 delays in project completion, the SOMAH PA has postponed focus groups until 2022.

Goal 5: Ensure stakeholders are informed of and helping to co-market the program

Objective	Outcomes
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	<ul style="list-style-type: none"> ● Scheduled meetings & presentations with 25 government & legislative offices, 16 of which represented DACs, 15 of which represented DACs with identified eligible properties that have not applied. ● Efforts have been focused on establishing more formal co-marketing partnerships, which has resulted in higher engagement with fewer offices.
Develop and distribute semiannual progress reports (SAPR) stats twice annually to the Low- Income Oversight Board and the DAC Advisory Group to inform these stakeholders of program metrics and progress on DAC metrics	<ul style="list-style-type: none"> ● Distributed 2021 January and 2021 July SAPRs to primary stakeholder groups mentioned to ensure they were aware of program metrics and progress, particularly on DAC metrics.
Identify and conduct direct outreach to 25 government and legislative offices whose jurisdictions have had SOMAH project completions by December 2021	<ul style="list-style-type: none"> ● Currently SOMAH has 13 completed and paid projects in 7 counties: <ul style="list-style-type: none"> ○ San Luis Obispo ○ Tulare ○ San Bernardino ○ Riverside ○ Ventura ○ San Diego ○ San Francisco ○ Outreach was conducted to local agencies in all these counties.
Initiate at least 2 co-branding or co-marketing with IOU multifamily energy efficiency programs	<ul style="list-style-type: none"> ● Initiated 3 co-marketing partnerships: <ul style="list-style-type: none"> ○ 2 regional energy networks: 3C-REN and BayREN ○ Switch is On/TECH
Initiate co-branding or co-marketing with all operating community choice aggregators (CCAs) by December 2021	<ul style="list-style-type: none"> ● 20 CCAs contacted out of 29 total, where SOMAH does not have an existing relationship ● 1 blurb added to CCA website in 2021 (CleanPowerSF) ● 55 direct referrals to SOMAH website from CCA blurbs in 2021, including blurbs added in 2020:



	<ul style="list-style-type: none">○ Clean Power Alliance○ San Jose Clean Energy
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In 2021 the SOMAH Program garnered: **170** new applications representing **32.97** MW of solar, of which **17.71** MW is allocated for projects in DACs. **Thirteen** projects completed and paid along with **210** nearing completion at Proof of Project Milestone approved and beyond. Additionally, a new cohort of the SOMAH Advisory Council, and the JTO Task Force (selected in Q1 2022), continue to guide and advise ME&O efforts. This year also saw successes in relationship-building and co-marketing partnerships with local government and investor-owned utility (IOU) stakeholders. Finally, the completion of a Phase II third-party program evaluation by Verdant, whose findings and recommendations are being reviewed and incorporated into 2022 priorities and strategies, will enhance the team's capacity to reach more underserved communities across California.

The SOMAH PA acknowledges that the broader effects of COVID-19 across the economy and SOMAH-relevant industries, 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.

Market Analysis & Program Participation

The SOMAH PA completed multifamily affordable housing market research in 2021, to build upon prior market analysis conducted by the California Housing Partnership. This market research further expanded the analysis of regions with high concentrations of SOMAH-eligible DAC properties, to develop targeted marketing and outreach strategies. In addition to focusing on DACs, this research focused on underserved geographic regions and provided insights on specific historically underserved subpopulations – which included tribal housing entities and rural housing properties.

The 2021 market research also included an analysis of the Low-Income Housing Tax Credit (LIHTC) program, with information on the current number of existing SOMAH-eligible LIHTC properties, and projections of newly constructed and acquisition rehabilitation projects coming online in the next five years.

Additionally, the SOMAH PA leveraged the California Housing Partnership's preservation database to create the [Eligible SOMAH Properties Map](#). This interactive tool allows potential applicants to search for potentially eligible properties across the state and includes features such as number of affordable housing units per property, street address, and other customizable results.

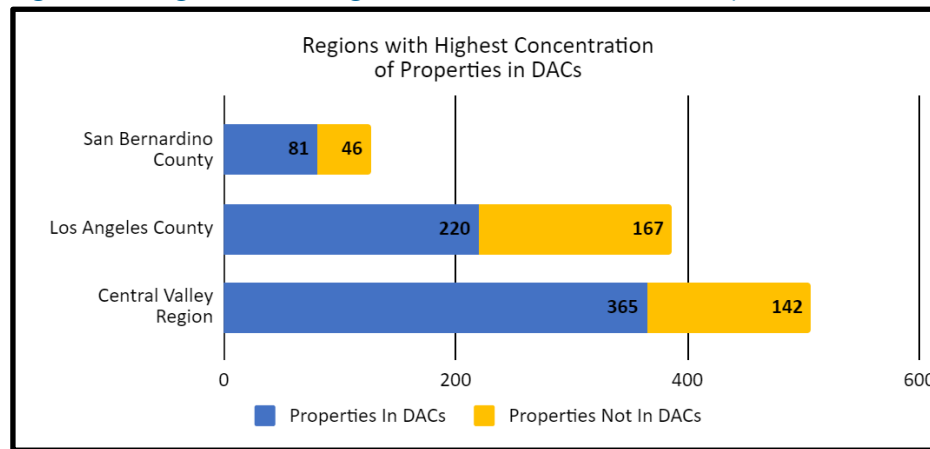
Potentially SOMAH-Eligible Properties

Analysis of the California Housing Partnership's Affordable Housing Preservation Database reveals that there are approximately **3,427** potentially SOMAH-eligible properties. The universe of potentially SOMAH-eligible properties includes properties in the partnership's database that have been screened to meet the following SOMAH Program requirements: 5+ units, 10+ years remaining on deed restriction, IOU or CCA customer, and either meets affordability requirements or is located in a DAC. The potentially SOMAH-eligible database does not exclude master metered properties, or properties that have utilized the MASH program or installed solar through other programs such as LIWP. As such, properties included in this database are considered “potentially eligible.”

Properties in DACs and High-Priority Regions

Approximately **30% (1,090)** of all potentially SOMAH-eligible properties are located in DACs as defined by CalEnviroScreen 3.0. The Central Valley has the highest concentration of potentially SOMAH-eligible properties, with approximately **72% (365)** of the region's potentially eligible properties located in DACs. Other regions of focus with high concentrations of properties in DACs include Los Angeles and San Bernardino counties. As the SOMAH PA continues to develop outreach strategies to boost program participation in DACs, the Central Valley region remains a high-priority region.

Figure 1: Regions with Highest Concentration of Properties in DACs

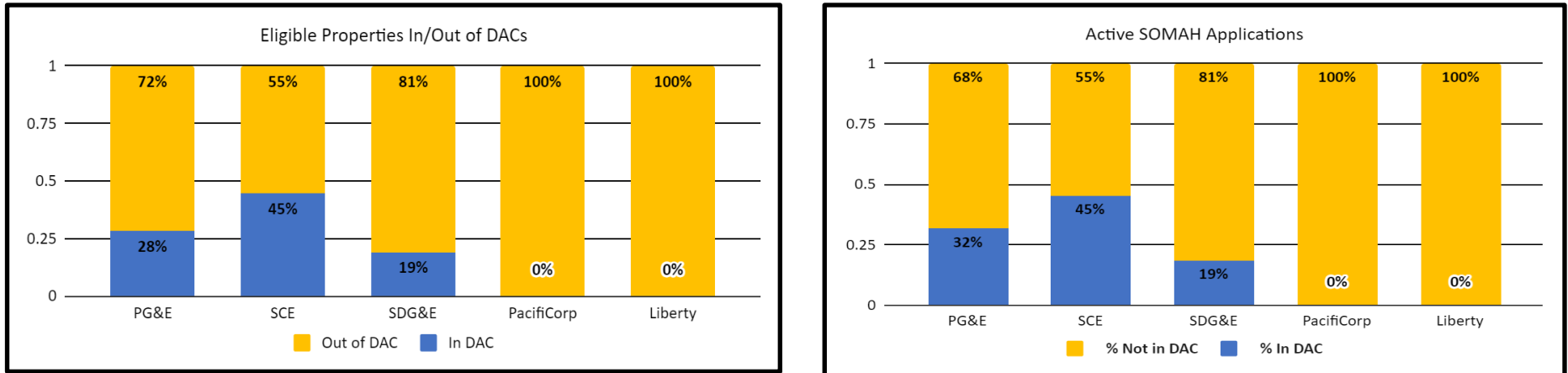




Analysis of Active SOMAH Applications

As of December 31, 2021, there are **482 active SOMAH applications**. Among the active SOMAH applications, approximately **32% (154)** are attributed to properties located in DACs — which is just above the 30% overall share of potentially eligible properties in DACs. Analysis of active SOMAH applications shows that, on average, each IOU's share of applications is roughly proportional to their overall share of potentially eligible properties in DACs.

Figure 2: Comparison of SOMAH-eligible Properties and Active Applications in & out of DACs, by IOU





Highlighting Underserved Populations

The 2021 market research provided key insights on historically underserved populations with the intention of developing targeted outreach and engagement efforts to increase program participation within these underserved communities. The research included analysis of rural housing properties and tribal housing entities. There are currently **358 potentially SOMAH-eligible rural housing properties**, with approximately 30% of eligible rural housing located in counties within the Central Valley region.

Figure 3: Geographic Regions with Highest Share of USDA-Financed Rural Properties⁵

County/Region	# of properties	Share of state's USDA-Financed portfolio
Central Valley	109	30%
Riverside County	20	6%
Ventura County	14	4%
San Bernardino County	11	3%

Connecting tribal housing entities was also a key component of the 2021 market research. Analysis of the potentially SOMAH-eligible database helped to identify several tribal housing entities, including the top five with the most eligible properties: Chemehuevi Indian Tribe, Round Valley Indian Housing Authority, Yurok Indian Housing Authority, and the Karuk Tribe Housing Authority.

Building a Long-Term SOMAH Pipeline

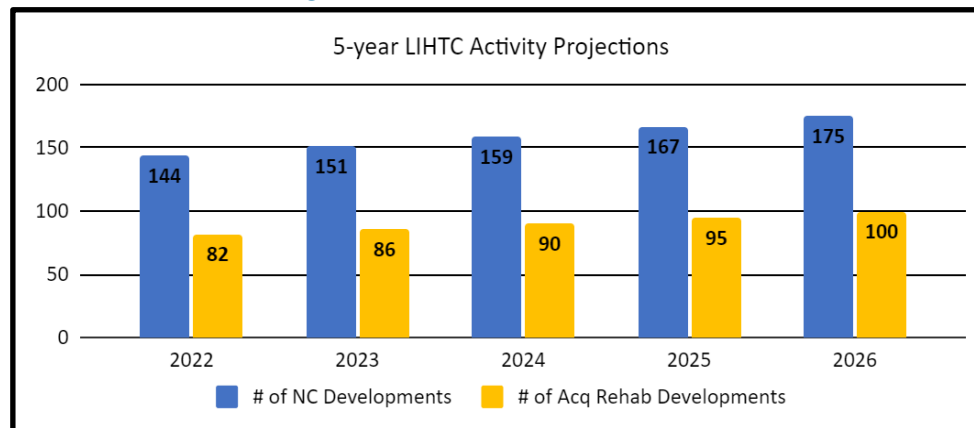
The Low-Income Housing Tax Credit (LIHTC) is one of the state's largest funding sources for affordable housing development. Approximately 83% of potentially SOMAH-eligible properties are financed through the LIHTC program. As such, the LIHTC program serves as a great pipeline of potentially eligible properties for the SOMAH Program. The 2021

⁵ This table represents the top four regions with the highest share of USDA properties.



market research included five-year projections for both new construction and acquisition rehabilitation LIHTC projects (see Figure 4 below).

Figure 4: 5-Year LIHTC Graph



The SOMAH Program will use the 2021 market research to continue improving marketing and outreach efforts to underserved and priority communities, including those in DACs and other subpopulations. To better understand the remaining gaps in the SOMAH Program pipeline, the 2022 Market Analysis will include:

- Research and analysis of funding programs that serve underserved communities including the Indian Housing Block Grant and HOME programs, among others
- Further analysis of tenant demographics, to understand how the program can more equitably distribute clean energy dollars
- Analysis of current co-marketing partners to ensure that SOMAH materials are reaching diverse audiences
- Continued research of public housing authorities and tribal housing entities to identify those with development team capacity and thus more likely to be able to participate



CalEnviroScreen 4.0 (CalES4.0)

The SOMAH PA recognizes that moving from CalEnviroScreen Version 3.0 to 4.0 shifts the number of identified SOMAH eligible properties from 1,100 to 1,089 properties (net loss of 11 properties). The SOMAH PA is in the process of proposing a handbook update to allow for continued CES 3.0 eligibility. For the properties that are losing status the SOMAH PA is working on prioritizing outreach to those to ensure they can access the pipeline.

Figure 5: Breakdown of SOMAH eligible properties by CalEnviroScreen version

IOU	SOMAH eligible properties in CES 3.0 DACs	SOMAH eligible properties in CES 4.0 DACs	Net Difference
PG&E	582	549	-33
SCE	453	481	+28
SDG&E	65	59	-6
Total	1,100	1,089	-11

Phase II Third-Party Evaluation Findings & Recommendations

In September 2020, SOMAH's independent third-party evaluator published its Phase I Evaluation Report. This evaluation was used to review the ME&O strategies and tactics for 2021. In Q3 2021, Phase II of the evaluation was completed with a final Phase II Evaluation Report released October 2021. Phase II activities included the following: 1) assessment of current and proposed final metrics for evaluating the program, 2) contractor and property owner interviews and web surveys to understand barriers and challenges to participating, 3) requests for additional IOU data, 4) process flow charts for better understanding the program mechanics, and 5) program impact analysis.

Many findings and recommendations focus on challenges both property owners and contractors are facing in accessing and participating in the program, particularly smaller contractors and property owners. Other findings emphasize the need to engage stakeholders (specifically investor-owned utilities and local government) in co-marketing to increase program awareness. The SOMAH PA's responses to ME&O related recommendations will be incorporated into the 2022 Priorities, Goals & Objectives section below. The SOMAH PA appreciates the work of the evaluation team and shares a commitment to the continuous improvement of this historic program.

Third-party evaluation reports can be accessed via the CPUC's SOMAH webpage at cpuc.ca.gov/somah/ under the heading, "SOMAH Evaluation Reports."

2022 Priorities, Marketing Strategy, Goals & Objectives

The SOMAH Program's priorities, goals, and objectives focus ME&O tactics on outreach that 1) ensures the state's most under-resourced communities are meaningfully engaged and able to access SOMAH's benefits, 2) centers on equity and community benefits, and 3) prioritizes strategic partnerships with groups already working with SOMAH's intended audiences. These groups include CBOs, IOUs, trade organizations, and state and local agencies. The SOMAH PA's 2022 ME&O plan will also focus on building the program's pipeline of property owners and contractors.

SOMAH's 2022 Priorities

Prioritizing 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 pollution-burdened 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.

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. The SOMAH PA is continuing to prioritize activities that will ensure equitable outcomes across program objectives. Developing targeted strategies and tactics in coordination with existing and new CBO partnerships 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

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 their invaluable networks across California to connect with environmental justice communities (see Figures 5 and 6 below for CBO organizing areas and JTO locations in reference to SOMAH applications and eligible properties). The program also explores co-marketing opportunities with IOUs, affordable housing associations, and local, regional, and state government entities. The goals of these efforts are to expand the SOMAH PA's outreach efforts to DACs and underserved audiences and ensure the SOMAH PA is credible, transparent, and accountable to the communities it serves. In 2022, CBOs and JTOs will support 2022 ME&O objectives by:

- [CBOs] Tier 2 CBO partnerships, building on SOMAH's CBO Listening Sessions in 2021, will be primarily focused on property owner outreach, and stakeholder engagement with the end goal of supplementing and supporting PO outreach through additional trusted messengers
- [CBOs] Continuing to ensure materials that promote SOMAH to tenants and property owners, and tenant education materials, are culturally and linguistically relevant
- [CBOs] Continuing direct outreach across the state to tenants, JTOs, and potential job trainees about SOMAH's benefits and opportunities, and conducting tenant education workshops and services in DACs
- [CBOs] Leveraging existing CBO relationships to conduct direct outreach to local government offices in DACs and the Central Valley, both key strategic targets in SOMAH's ME&O efforts, and engage elected local government officials to promote SOMAH
- [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

Figure 6: Overlay of CBO organizing areas and reach, JTO locations, and SOMAH-eligible properties

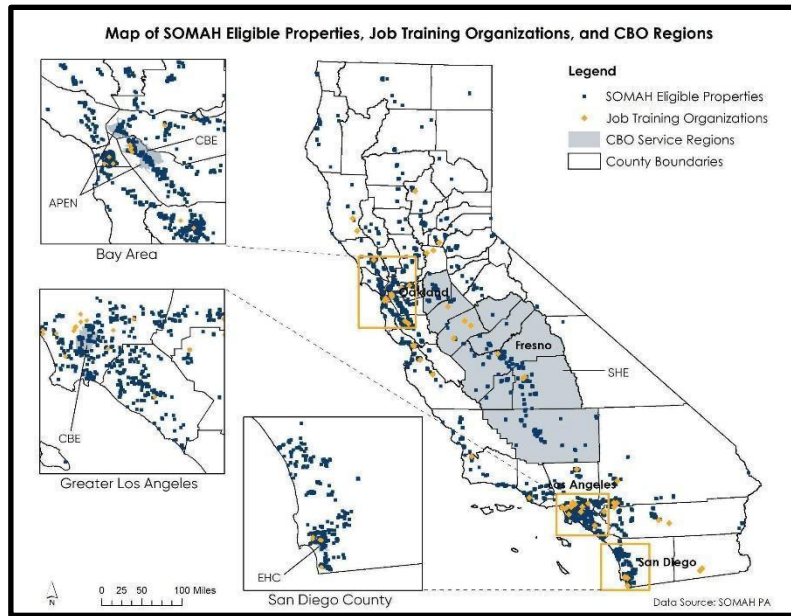
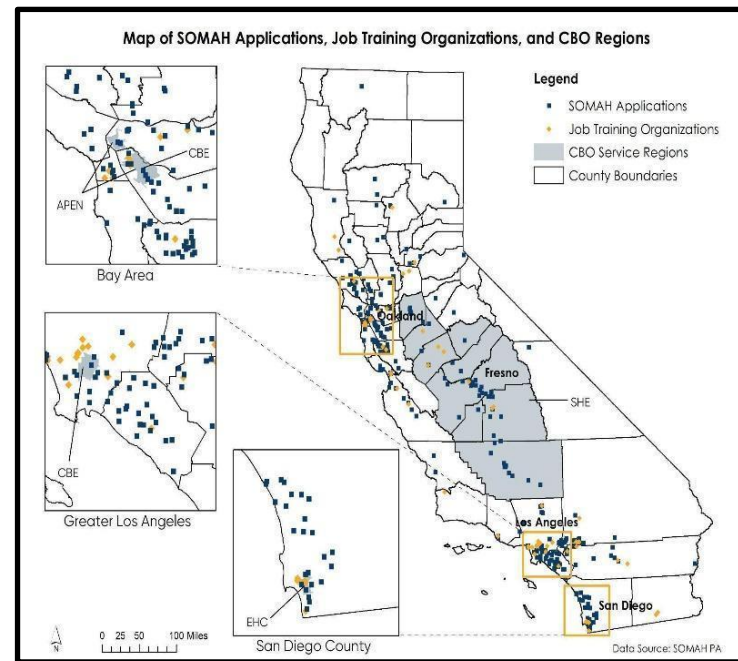


Figure 7: Overlay of CBO organizing areas and reach, JTO locations, and SOMAH applications



Recruitment and retention of property owners and contractors

The SOMAH PA is committed to recruiting and retaining property owners and contractors to help achieve SOMAH's target of 300 MW of solar by 2030, as well as the diversity and equity goals mentioned previously. This ensures that SOMAH is benefiting properties/property owners of all types, especially those the program is prioritizing properties in DACs, owners with smaller property portfolios, and tribal, farm worker, and senior housing. The SOMAH PA is also focused on having a robust and diverse database of job trainees and contractors that represent communities and businesses (women, minority, LGBTQ+) that are often underrepresented in these spaces. An integral part of making progress toward these goals in 2022 will be the ME&O strategies developed and implemented to reduce barriers to recruitment and retention of these audiences including the increase in the self-efficacy of property owners and contractors to complete the program via its no-cost technical assistance services.

Emphasizing digital & remote engagement in response to COVID-19

Due to the evolving COVID-19 pandemic, the SOMAH PA plans to keep ME&O activities predominantly online and remote for the first half of 2022 to protect the health and safety of SOMAH's audiences and to anticipate any future surges. Maintaining predominantly digital programming presents both challenges and opportunities that the SOMAH PA and CBO partners continue to navigate. Additionally, the SOMAH PA continues to employ off-line remote tactics for reaching audiences including phone calls, mailers, flyers, etc. The SOMAH PA will continue to monitor the COVID-19 situation and make any necessary adjustments that prioritize the health and safety of the PA and the communities it serves.

2022 Marketing Strategy

The SOMAH PA engages contractors, multifamily affordable housing property owners, multifamily affordable housing tenants, job training organizations, job trainees, and various stakeholders (regional and local government agencies, elected officials, IOUs, and community choice aggregators) with vested interest in SOMAH's outcomes, through a multipronged marketing strategy employing direct outreach, websites, paid and organic media, earned media, owned media, and shared media. This strategy considers factors such as audience (including segmented audiences within larger audience categories), location, language, accessibility, and specific campaigns goals (i.e., increasing general awareness, driving attendance to specific events, and/or increasing participation in specific program areas).



General 2022 ME&O Tactics

- *Direct Outreach*

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

- On-site events (i.e., ribbon-cutting ceremonies)
- Webinars (i.e., workshops, presentations, and trainings)
- Trade and community conferences

- *Website*

Ensure digital properties are updated with content that is timely, relevant, and culturally connected and are optimized for user experience and program participation. This includes:

- Optimizing SOMAH website to include custom landing pages to improve conversions and to set up digital ad campaigns for success
- Improving user experience to facilitate application process
- Create educational content to better support program participation

- *Paid Media*

Leverage paid media for education, awareness, and lead generation. This includes:

- Online/mobile:
 - Google search and displays ads
 - Trade publication ads, including advertising in popular newsletters
 - Exploring new advertising digital opportunities and tactics including native advertising, geo-fencing, and website retargeting
- Social:
 - Grow Facebook, Twitter, LinkedIn, and Instagram platforms
 - Explore new advertising platforms like WhatsApp and Nextdoor
 - Boost events/webinars
- Traditional:
 - Local community newspapers

- *Organic Social Media*

The SOMAH PA has a social media presence on LinkedIn, Twitter, Facebook, and Instagram (launched July 2021). The 2022 workaround organic social media will include the following:

- Maintain up-to-date platforms with latest events and content updates:



- Strengthen social media partnerships with IOUs, CBOs, and other stakeholders
- Leverage live streams to increase engagement
- *Earned Media*

Engage the robust media landscape and the heightened interest in sustainable energy to raise program profile among grass tops and grassroots audiences. This includes:

 - Press conferences/press releases: Use program launches and milestones to create media opportunities featuring partners, CBOs, and impacted community members.
 - Editorials: Examine opportunities to publish opinion editorials alongside relevant stakeholders to highlight program successes to raise awareness with both general and multicultural audiences, as SOMAH relates to wider environmental, energy, or economic justice topics and current events.
 - Story pitching: Regularly pitch local success stories to local press, including print publications and television stations in the relevant DAC areas.
- *Owned Media*

Create a pipeline of timely, relevant, and culturally connected content to explain how the program works and raise awareness about program benefits to specific audiences. Effort includes:

 - Educational content per audience (see activities tables for Goals 1-5 in SOMAH's 2022 ME&O Goals' section) along with infographics and other visual objects optimized for sharing across platforms
 - Testimonials and success stories in various formats
 - Email marketing campaigns including a nurture campaign for participants already in the system who have not taken action
- *Shared Media*

Create content that is specifically tailored to key program messengers including partners and CBOs. This includes:

 - Content calendar for the year
 - Quarterly content kits with relevant content by audience (in-language when applicable)
 - Cross promotion of content between partners



2022 ME&O Goals

This section outlines the 2022 ME&O Goals and objectives, along with the activities and key performance indicators (KPIs) that the SOMAH PA uses to implement, track, and achieve the desired outcomes. While the five goals listed below are simultaneously being worked on, the main goal has and continues to be increasing the pipeline of properties in the program, to reach the desired goal of 300kw by 2030. Applying the strategic approaches outlined above, along with insights and learnings from 2021 ME&O efforts and third-party program evaluation recommendations, the goals for 2022 are:

- Goal 1: Engage property owners to build and maintain a multiyear pipeline of diverse projects.
- Goal 2: Continue to build a robust and diverse contractor base and support eligible contractor retention.
- Goal 3: Ensure sufficient job trainee participation and preparation for SOMAH job training opportunities or relevant careers.
- Goal 4: Educate SOMAH-eligible tenants and tenants living in participating SOMAH properties about the program and how to maximize their benefits.
- Goal 5: Ensure stakeholders are informed 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 SMARTIE⁶ 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.

⁶ SMARTIE = Strategic, Measurable, Actionable, Realistic, Time-bound, Inclusive, and Equitable.

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

Overview

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. 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 to eliminate their barriers to solar PV installation by engaging them through the program's no-cost technical assistance services.

In 2022, the SOMAH PA will focus on building and 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, rural areas.

Crucially, the program's initial cohort of 13 completed and paid projects in 2021 allows the SOMAH PA to move beyond purely awareness-raising efforts describing the program and prospective benefits to potential participants, toward leveraging real success stories to spur further participation in DACs, within Track A, and in general.

Figure 8: Active SOMAH application density and location across California

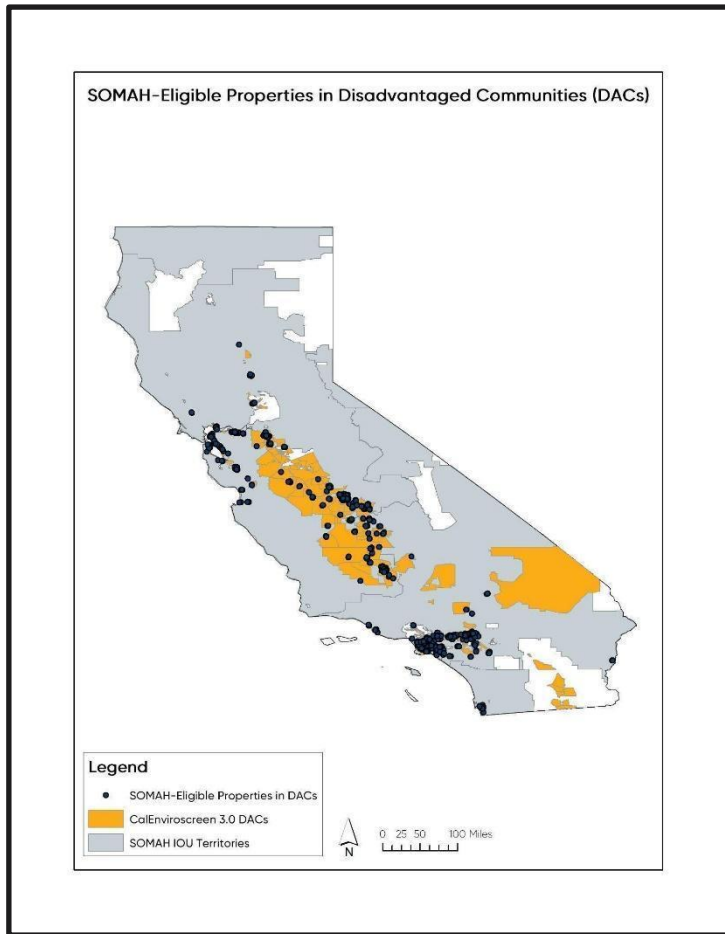


Figure 9: Geographic distribution of SOMAH-eligible properties in DACs

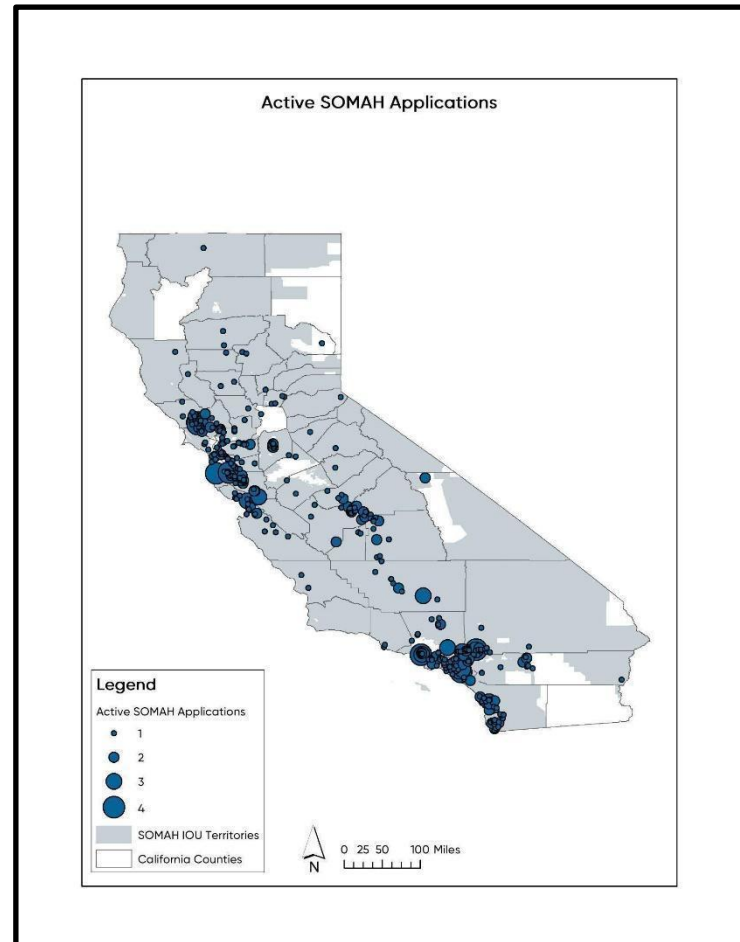




Figure 10: Number of applications by IOU territory (2020 vs. 2021)⁷

IOU Territory	# of SOMAH applications 2020	# of SOMAH applications 2021
PG&E	231	365 (+134)
SCE	162	213 (+51)
SDG&E	80	88 (+8)
PacifiCorp	2	2
Liberty	1	1

⁷ Includes canceled and withdrawn projects as of November 15, 2021.

Due to the combination of the lasting financial impacts of the COVID-19 pandemic, the complexity of the program, long timelines for decision-making related to site upgrades, and solar inexperience among affordable housing organizations, the SOMAH PA has prioritized establishing multiple touch points with property owners to encourage enrollment in the program.

In addition to establishing new co-marketing partnerships, the SOMAH PA prioritized increasing the program's digital presence through paid sponsorship opportunities, which have been crucial in capturing the attention of multifamily affordable housing professionals to disseminate marketing materials via the affordable housing associations extensive networks. As events continue to be held virtually in 2022, paid sponsorships will remain a vital tool in reaching property owners. Lastly, the SOMAH PA remains dedicated to building an increased understanding of the inner workings of diverse property owner types such as tribal entities to ensure that the program is well suited to mitigate existing barriers to program participation by providing assistance.

Priorities for this audience this year and key strategies

- *Increasing property owner participation/Track A pipeline*

Increase Track A participation through *direct outreach* as well as promotion of the Upfront Technical Assistance (TA) application video — a walkthrough demo of the application process and documents needed to apply for Track A — and an email nurture campaign that will help educate, promote going solar, provide special assets/tools to engage property owners in the process, and highlight Upfront TA through multiple content pieces, including an Upfront TA case study that showcases how the TA team was able to support a property owner through various hurdles encountered with their project. This work will be conducted by the SOMAH PA team, as well as CBO partners. While generating traffic for Track A is the key focus of these property owner engagement activities, the SOMAH team expects that these efforts may also encourage some owners to move forward with contractors with whom they have engaged via Track B, which supports the overarching goal of building a robust pipeline to reach 300 MW of solar by 2030.

- *Prioritizing outreach in DACs*

In 2022, the SOMAH PA will prioritize DACs in the following ways: formalizing and operationalizing a goal that at least 40% of participating properties be located in DACs by 2026, continuing outreach to property owners with properties in DACs via direct phone calls and emails, targeting social media, and attending conferences and events specifically in these regions. In addition, findings from the DAC property owner focus groups held at the end of 2021 will inform marketing and outreach efforts by specifically working to mitigate any pain points that are common among this group. For an overview of findings refer to



the “Challenges identified and lessons learned in 2021” section below. Furthermore, the SOMAH PA will continue to identify and expand upon the list of potentially eligible SOMAH DAC properties in the program’s property database.

- *Improving property owner SOMAH website user experience to simplify application submission process*

There has been a significant number of concerns regarding the overall usability of the site, specifically from property owners. The CalSOMAH.org website will be undergoing a major revamp in 2022. The main goal of these updates is to present information more clearly and allow users to navigate through the site seamlessly.

Challenges identified and lessons learned in 2021

The SOMAH PA has compiled a variety of challenges and lessons learned throughout the program year. Significant sources of feedback were rendered from Verdant’s Third-Party Evaluation, property owner surveys (i.e., COVID-19 survey), and the property owner focus groups. While initial feedback from the focus groups conducted in 2021 helped identify barriers and challenges, the SOMAH PA will continue its research in 2022 through additional focus groups and surveys. The goal of these efforts will be to increase program accessibility by mitigating property owner pain points (see the [2022 January SAPR](#) for research methodology).

Overarching themes of lessons learned for the property owner audience are as follows:

- *Adding solar is not always a top priority for property owners*
Due to the housing crisis in California and continued impacts from the COVID-19 pandemic, providing housing for tenants remains the top priority. While there could be many benefits to a solar installation, other larger issues take precedence.
- *Lack of staff available to manage a solar installation*
Many organizations are short-staffed and do not have capacity to take on a SOMAH project. The administrative burden and time that needs to be dedicated is not possible for some organizations.
- *Building credibility with this audience has proven to be difficult*
Property owners greatly value hearing from fellow property owners and learning about their experience with the program. Success stories from participating property owners will be collected and shared with property owners that are not yet ready to participate. Additionally, a referral program will be launched that will help build trust.



- *The cost-benefit analysis of tenant solar can be a challenge, despite property owners' 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. The SOMAH PA has created many resources that can be used to present the benefits of Upfront TA and how to apply for it, including a walkthrough video of the application process as well as a webinar and website content highlighting an Upfront TA case study.

- *The comprehensive scope of affordable housing properties in California is unknown*

While the SOMAH PA has an extensive database of potentially eligible SOMAH properties, there are issues identifying the entire scope of affordable housing. The property data that the SOMAH PA utilizes contains properties leveraging major affordable housing financing sources such as LIHTC, HUD, and USDA funds. There may be properties leveraging other financing sources that are not included in the property database, meaning the SOMAH PA must continue to build upon the list of potentially eligible properties through outreach to property owner organizations.

2022 Objectives (to be achieved by December 2022)

1. With the goal of adding 300 MW of projects to SOMAH's pipeline, conduct direct outreach to 200 affordable housing organizations, including at least 10 tribal housing authorities and 20 public housing authorities. Outreach will prioritize properties in DACs and targeted communities such as the Central Valley and Los Angeles regions. Relevant activities will be conducted by the SOMAH PA as well as its CBOs and other co-marketing partners.
2. Add at least 40 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.
3. Host five webinars for property owners with a minimum 10 registrants, with a prioritization on attendance for property owners with properties located in DACs



and targeted communities.

4. Add at least five new property owner co-marketing partners in application gap regions such as the Central Valley, Southern California, rural housing, tribal housing entities, and farmworker housing.
5. Increase presence in key statewide and regional affordable housing conferences by participating in two to four conferences with property owners representing the Central Valley, Southern California, and other target populations.
6. Encourage at least 20% of all applications to request or utilize an aspect of SOMAH Technical Assistance and Support Services, including financial assistance, solar feasibility, tenant education services, job training support, contractor bidding, VNEM allocations, energy efficiency support, and interconnection support.

2022 Audiences and Main KPIs

Audiences

- Nonprofit affordable housing owners
 - Faith-based housing
 - Rural housing
 - Farmworker housing
 - Permanent supportive housing (PSH)
- For-profit affordable housing owner
 - Rural housing
 - Farmworker housing
- Tribal housing entities
- Housing authorities
- Property owners not subscribed to the SOMAH email list
- Property owners subscribed to the SOMAH email list
- Affordable housing associations

Main KPIs

- Number of new applications
- Number of new DAC applications
- Number of new email subscribers
- Number of new interest calls
- Number of webinar attendees
- Number of unique organizations contacted
- Number of diverse property owner types contacted (housing authorities, tribal housing entities, etc.)
- % of projects requesting or utilizing SOMAH Technical Assistance and Support Services

2022 Activities

No.	Activity	Channels/Tools	Audience	Duration
1.1	Identify and conduct outreach to diverse property owner organizations	<ul style="list-style-type: none"> ● Salesforce ● Direct outreach 	<ul style="list-style-type: none"> ● Nonprofit property owners ● For-profit property owners ● Housing authorities ● Tribal entities ● Management companies 	<ul style="list-style-type: none"> ● Q1-Q4 ● Ongoing
1.2	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"> ● For-profit property owners ● Nonprofit property owners ● Housing authorities ● Tribal entities ● Management companies 	<ul style="list-style-type: none"> ● Q1-Q4 ● Ongoing
1.3	Develop case studies, success stories, quotes, and testimonials from participating owners and projects targeted at property owners who are not yet participating or who have additional potentially eligible properties to illustrate the benefits of SOMAH	<ul style="list-style-type: none"> ● CalSOMAH.org ● Email (Marketo) ● Targeted advertisements and media 	<ul style="list-style-type: none"> ● Property owners ● Management companies ● Affordable housing associations 	<ul style="list-style-type: none"> ● Q1-Q4 ● Ongoing
1.4	Identify and coordinate with new co-marketing partners to market the SOMAH Program to their audiences	<ul style="list-style-type: none"> ● Additional CBOs ● 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 	<ul style="list-style-type: none"> ● Q1-Q4 ● Ongoing
1.5	Research the potential value of a property owner referral program to incentivize word of	<ul style="list-style-type: none"> ● Direct PO engagement 	<ul style="list-style-type: none"> ● Enrolled SOMAH property owners 	<ul style="list-style-type: none"> ● Q1-Q3 ● Ongoing



	mouth program recommendations			
1.6	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, CCRH) Building Decarbonization Summit Solar 101 Institute Clean energy events 	<ul style="list-style-type: none"> Property owners Management companies Affordable housing associations 	<ul style="list-style-type: none"> Q2-Q4 Apr, and Sep-Nov
1.7	Gather feedback from housing authorities and tribal entities with active LIHTC projects to improve outreach strategies	<ul style="list-style-type: none"> LIHTC application data Direct outreach Salesforce 	<ul style="list-style-type: none"> Housing authorities Tribal entities 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
1.8	Launch email nurture program for new and existing property owners	<ul style="list-style-type: none"> Email (Marketo) CalSOMAH.org 	<ul style="list-style-type: none"> New and existing property owner email subscribers 	<ul style="list-style-type: none"> Q3 After new website launch
1.9	Targeted marketing efforts informed by a list of cities and/or zip codes in DACs	<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 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
1.10	Reframe and disseminate technical assistance marketing and educational materials to increase Track A participation	<ul style="list-style-type: none"> CalSOMAH.org Email (Marketo) 	<ul style="list-style-type: none"> Property owners and managers 	<ul style="list-style-type: none"> Q1-Q3 Ongoing



1.11	Update CalSOMAH.org to streamline technical assistance offerings	<ul style="list-style-type: none"> • CalSOMAH.org 	<ul style="list-style-type: none"> • Property owners and managers 	<ul style="list-style-type: none"> • Q1-Q3 • Ongoing
1.12	Promote first-touch technical assistance services through the dissemination of Technical Assistance Light Reports to ensure that property owners are aware of the potential financial benefits of solar at their property and estimated project costs	<ul style="list-style-type: none"> • Direct outreach 	<ul style="list-style-type: none"> • Property owners and managers 	<ul style="list-style-type: none"> • Q1-Q4 • Ongoing
1.13	Promote solar financing information and resources to interested property owners	<ul style="list-style-type: none"> • CalSOMAH.org • Email (Marketo) • Direct outreach • Webinars (GoToWebinar) 	<ul style="list-style-type: none"> • Property owners and managers 	<ul style="list-style-type: none"> • Q1-Q4 • Ongoing

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

Overview

Contractors are highly motivated to connect with property owners who want to participate in the program and have led the application process for 98% of current applications (see 2022 January SAPR). If contractors are to successfully navigate the program, the SOMAH PA recognizes and continues to provide support that ensures contractors have:

- A high self-efficacy in sharing information about SOMAH and its offerings with different audiences
- Access to information about program eligibility and requirements, instructions on submitting applications, and online bidding
- Access to tools and resources that help them promote the SOMAH Program to specific audiences, i.e., property owners

Because 2020 was a year of unexpected global events, 2021 has continued to act as more of a baseline year for contractor outreach tactics to increase contractor participation in SOMAH. Baseline tactics are different marketing approaches to learn what works most successfully to increase nonparticipating contractor application submissions.

Nonparticipating SOMAH-eligible contractors⁸

In 2021, contractor retention focused on feedback gathered via research through a barriers to entry survey and two contractor focus groups for marketing improvements based on qualitative research results. Nonparticipating contractors who participated in focus groups and interviews conducted by the third-party evaluator described barriers to participation that included lead generation, staff capacity, financial burden, program requirements, lack of experience with multifamily affordable housing and administrative burdens (see [2022 January SAPR](#)).

Potential contractors⁹

The eligibility training is the first step in becoming a new eligible contractor. The SOMAH Program held six Application and Eligibility Trainings in 2021. Once the attendance requirement is fulfilled by a contractor's company, three emails are sent to new

⁸ A nonparticipating SOMAH-eligible contractor has completed the eligibility process but has not submitted an application.

⁹ Potential contractors are solar contractors who have not participated in the required eligibility process or signed up for the SOMAH email sign-up and must be recruited to participate in the program.



contractors to collect their primary information, signifying that the contractor would like to continue on the path to becoming a SOMAH-eligible contractor. In 2021, the SOMAH PA began calling attendees to inform them that they had not met the final requirement. The new tactic increased the finalization of the eligibility process. The personalized one-on-one approach provided contractors opportunities to answer questions, in particular around next steps toward completing the program. Per survey and focus group data, program requirements continue to be difficult for contractors to understand. Therefore, continuing engagement with contractors after an eligibility training is important to retain interest in pursuing SOMAH application submissions.

In 2021, the SOMAH PA conducted eligibility training outreach to new contractors where geographic gaps of eligible contractors exist with five tactics:

1. *Featured publication in Solar Builder Magazine – June 10*

Focused on progress payments making SOMAH more accessible to contractors and included a call to action to join the July eligibility training. This effort led to seven website visits, including four new users.

2. *In-app ad campaign – June 8 to July 8*

Hired external in-app marketing team to promote July eligibility training. Campaign focused on six Central Valley ZIP codes. It had 62,000+ impressions and 445 clicks, resulting in one new contractor joining the July training from Fresno.

Figure 11: Sample mobile ad placement





3. *Direct phone calls*

Calls were placed to all eligible contractors in the Central Valley, Liberty Utilities, and PacifiCorp – August to December. Successful calls, where contractors answered the phone, led to interested contractors. However, none of the contacted contractors participated in the September eligibility training.

4. *Email announcements*

In 2021, continuous emails were sent to the California Solar & Storage Association.

5. *Diverse contractor association advertisements – June to December*

This effort was unsuccessful as associations did not reply to direct emails or phone calls. The associations who did respond, suggested other associations who fell under stakeholder engagement.

Priorities for this audience this year and key strategies

- *Prioritizing outreach in DAC and application gap regions*

The majority of SOMAH applications have been contractor-led applications (see [2022 January SAPR](#)). Therefore, if the SOMAH PA focuses on contractor outreach in DACs and where there are not any eligible contractors, there should be an increase in applications.

- *Increasing nonparticipating contractor application submissions*

The number of participating contractors and subcontractors versus nonparticipating contractors is low — 23 out 130 eligible contractors. The SOMAH PA will be dedicating marketing efforts to simplifying messaging on program requirements for contractors, as well as increasing awareness through a targeted contractor nurture campaign, and clarifying how to use the property eligibility map for lead generation.

- *Research on barriers to entry to improve diverse and subcontractor participation*

The SOMAH PA will continue to conduct focus groups to obtain more qualitative data on how to improve the marketing efforts by the SOMAH PA. Focus group results determined issues could be resolved if small contractors could be used as a subcontractor, where administrative and financial burdens are decreased or eliminated (see [2022 January SAPR](#)). SOMAH will focus on connecting nonparticipating contractors with participating contractors to increase diverse contractor participation in 2022.

Challenges identified and lessons learned in 2021

- *Low survey and focus group participation*



The more information that the SOMAH PA can obtain from nonparticipating eligible contractors, the more the SOMAH PA's marketing efforts and messaging can cater to potential contractors. The SOMAH PA had a total of 20 contractors finish the barriers to entry survey and 20 partial completions (see [2022 January SAPR](#)). The focus group had a total of six participants across two one-hour sessions. Though participation was low, the information obtained in both primary research channels helped to improve the SOMAH PA's approach to improvements to the marketing design.

- *Engaging potential contractors through third-party marketing opportunities (i.e., in-app ads and diverse contractor associations)*

These efforts yielded low engagement by potential contractors. It has proven difficult to reach potential contractors without in-person conferences. This has resulted in a decrease in eligibility training registrations.

- *Continued confusion among contractors about program requirements*

SOMAH is streamlining informational messaging and making program requirements easier to understand. The website and eligibility trainings will also be redesigned to help with clarified language to help increase application submissions.

2022 Objectives (to be achieved by December 2022)

1. Continue outreach to all (~34) potentially eligible contractors across geographic gap regions, regions with limited SOMAH-eligible contractors, and where there are eligible properties (Liberty Utilities, PacifiCorp, Central Valley).
2. Enroll at least one contractor as an eligible contractor per each area identified in Objective 1.
3. Increase application submissions by at least four nonparticipating contractors.
4. Hold at least one focus group composed of nonparticipating contractors and/or subcontractors to identify barriers and challenges to participation.
5. Hold at least five Contractor Eligibility Trainings.
6. Advertise SOMAH in at least one diverse contractor association or publication.
7. Match subcontractors to applications that would like a third-party contractor to assist with PV installation.

2022 Audiences and Main KPIs

<p>Audiences</p> <ul style="list-style-type: none">● Number of new SOMAH-eligible contractors and subcontractors● Number of new self-identified diverse SOMAH-eligible contractors (women, minority and/or LGBTQ+-owned businesses)● Number of applications from contractors that had no previous applications through 2021● Number of applications from diverse or small contractors that had no previous applications through 2022● Webinar registration	<p>Main KPIs</p> <ul style="list-style-type: none">● Diverse contractors (women, minority and/or LGBTQ+-owned businesses)● Contractors with applications● Potential contractors● Smaller contractors (25 employees or less)● Nonparticipating eligible contractors● Subcontractors
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2022 Activities

No.	Activity	Channels/Tools	Audience	Duration
2.1	Develop and execute a plan for expanding contractor coverage into low coverage and priority geographic areas	<ul style="list-style-type: none"> Direct emails Direct calls Social media campaigns 	<ul style="list-style-type: none"> Potential contractors 	<ul style="list-style-type: none"> Q1-Q4 For Eligibility Trainings
2.2	Launch email nurture campaign for nonparticipating contractors	<ul style="list-style-type: none"> Marketo CalSOMAH.org 	<ul style="list-style-type: none"> Contractors in listserv 	<ul style="list-style-type: none"> Q3-Q4 After new website launch
2.3	Evaluate and optimize the efficacy of the Eligibility Training Webinars	<ul style="list-style-type: none"> Focus group 1-1 consultations Webinar surveys 	<ul style="list-style-type: none"> Potential contractors Nonparticipating contractors Subcontractors 	<ul style="list-style-type: none"> Q1-Q4 Bimonthly (after every Eligibility Training)
2.4	Conduct contractor focus group or interviews of nonparticipating eligible contractors to evaluate experience and barriers to participation	<ul style="list-style-type: none"> Virtual event 	<ul style="list-style-type: none"> Nonparticipating contractors Subcontractors 	<ul style="list-style-type: none"> Q2-Q3 Ongoing
2.5	Collect and analyze contractor demographic data	<ul style="list-style-type: none"> Primary contact information 	<ul style="list-style-type: none"> Newly eligible contractors 	<ul style="list-style-type: none"> Q1-Q4 Bimonthly (after every Eligibility Training)
2.6	Improve marketing materials for contractors to use when engaging property owners	<ul style="list-style-type: none"> Marketing toolkit 	<ul style="list-style-type: none"> Contractors (All) 	<ul style="list-style-type: none"> Q1-Q2 March & June
2.7	Improve contractor facing website layout: separating into 3 categories for	<ul style="list-style-type: none"> CalSOMAH.org 	<ul style="list-style-type: none"> Contractors (All) 	<ul style="list-style-type: none"> Q1-Q2 Ongoing



	different stages or application process and creating a resource library			
2.8	Promote SOMAH through external SOMAH channels	<ul style="list-style-type: none"> • Diverse contractor associations • Solar contractor media outlets 	<ul style="list-style-type: none"> • Potential contractors 	<ul style="list-style-type: none"> • Q1-Q4 • Ongoing
2.9	Leverage success stories to encourage participation by nonparticipating and potential contractors to demonstrate how SOMAH can benefit their businesses	<ul style="list-style-type: none"> • CalSOMAH.org • Email (Marketo) • Targeted advertisements and media 	<ul style="list-style-type: none"> • Nonparticipating contractors • Potential contractors 	<ul style="list-style-type: none"> • Q1-Q4 • Ongoing
2.10	Market contractor engagement position for 1-on-1 consultations and/or meetings with property owners during eligibility training, after primary contact is received, and with support services	<ul style="list-style-type: none"> • CalSOMAH.org • Email (Marketo) • Eligibility training 	<ul style="list-style-type: none"> • Contractors (All) 	<ul style="list-style-type: none"> • Q1-Q4 • Ongoing

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

Overview

The SOMAH PA continues to build the pipeline of eligible job trainees, with over 700 prospective paid job training opportunities created by SOMAH project applications received from program launch in July 2019 through 2021. Outreach efforts have remained focused on informing [SOMAH-eligible job training organizations](#) (JTOs) about SOMAH's job training opportunities as a pathway for their students and graduates to get hands-on experience on multifamily solar photovoltaic installation projects. Once aware of the program, the SOMAH PA encourages job seekers and prospective job trainees to sign up for the SOMAH Job Training Portal, where they can utilize the resume bank and job board to find open training opportunities and connect with SOMAH contractors.

The SOMAH PA increased support for participating contractors in meeting the job training requirements in 2021 by connecting 81 job seekers to contractors for 22 SOMAH projects. As a result of this support, 100% of SOMAH projects that submitted the job training affidavit with the Incentive Claim met all the job training requirements. The SOMAH PA encourages contractors to reach out to the workforce development team for support with job trainee recruitment and connection to local JTOs. Additionally, the SOMAH PA hosted a Job Training Overview webinar for contractors on October 14 to provide a detailed overview of the job training requirements and helpful resources and tips for facilitating a meaningful job training experience.

In 2021, the SOMAH PA engaged nine new JTOs and added 100 new job trainees to the Job Training Portal for a total of 369 of job trainees engaged on the Job Training Portal. Rising Sun Center for Opportunity, SOMAH's workforce development partner, Rising Sun Center for Opportunity, SOMAH's workforce development partner, facilitated targeted calls and emails to JTOs in regions where there was a high volume of SOMAH projects and limited JTO engagement including the Central Valley, Inland Empire, and San Diego County. The SOMAH PA will focus outreach to JTOs in these regions in 2022 and monitor new project locations. The SOMAH PA also focused outreach to JTOs that serve priority populations, such as justice system-impacted individuals and those facing other barriers to employment. Due to the ongoing COVID-19 pandemic, meetings and presentations have remained virtual. Although this has not significantly impacted



outreach efforts, the SOMAH PA hopes to resume some in-person outreach activities such as presentations to trainees and job fairs in 2022.

To support job trainees, the SOMAH PA continued to offer career development events and workshops to support trainees in accessing SOMAH job training opportunities and relevant careers. The SOMAH PA hosted an Interview Workshop in March and a Know Your Employment Rights Workshop in 2021 to prepare job seekers for successful careers.

Priorities for this audience this year and key strategies

- *Identifying barriers to participation for job trainees and developing resources and services to increase accessibility*

Existing barriers for potential job trainees include lack of a resume, lack of transportation, lack of tools needed on solar installation job sites, language barriers, and limited technology needed to access the SOMAH Job Training Portal. With support from Rising Sun Center for Opportunity, the SOMAH PA will continue to build out resources for job trainees including a Resources page on the Job Training Portal that will include access to free online solar training courses and a directory of local supportive services where job seekers can access transportation support or childcare support. The SOMAH PA will also continue to host career development workshops that support job trainees in attaining long-term employment in relevant careers. Additionally, the SOMAH PA continues to convene quarterly meetings with the Job Training Organization Task Force where barriers to participation are discussed frequently. The Task Force makes recommendations to the SOMAH PA on how to better support job trainees in accessing SOMAH job training opportunities and relevant careers.

- *Prioritizing job trainee safety (physical and emotional)*

Support job trainee safety by providing OSHA 10 training to priority trainees who reside near active SOMAH locations and trainees that meet SOMAH's targeted hire definition. In addition, the SOMAH PA plans to build out the Job Training Portal resume bank to spotlight trainees who have completed safety training. The program also will build out a jobsite safety guide and curate or develop resources to reinforce safety basics, particularly around OSHA's "Fatal Four" construction hazards (falls, electrocution, struck-by object, caught-in/between). The SOMAH PA will continue to educate job trainees and job seekers on their employment rights and how to report complaints to the SOMAH PA and empowered government agencies. Lastly, the SOMAH PA will continue to engage all program participants, including contractors and job trainees, on safety topics and ensure participants follow the Participant Code of Conduct.

- *Understanding hiring and workforce needs of solar contractors and employers in order to prepare SOMAH's job trainees for long-term career opportunities*



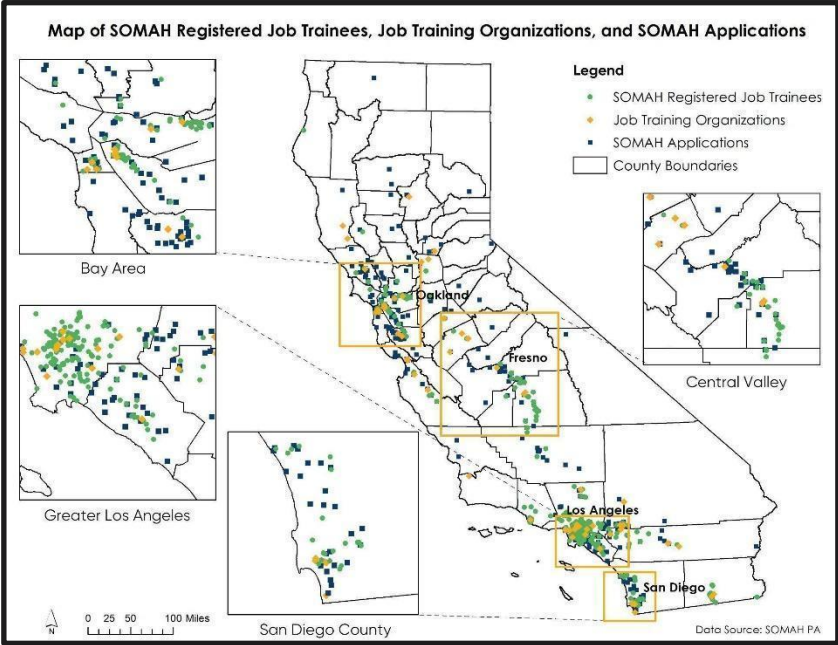
In 2022, the SOMAH PA intends to launch a Contractor Workforce Needs Assessment. SOMAH contractors will be surveyed on general hiring needs, challenges, and opportunities. Also, the SOMAH PA will convene roundtable discussions with contractors to gain more qualitative feedback. The program additionally will host workshops, such as the Fair Chance Hiring Workshop that was conducted in November 2021 and develop resources to promote the hiring and support of diverse job trainees and employees. Finally, the SOMAH PA will engage the Job Training Organization Task Force in conversations about solar industry workforce needs and training opportunities.

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

Provide personalized support to contractors for every SOMAH project on understanding and meeting the job training requirements and recruiting qualified job trainees, prioritizing local and targeted trainees. SOMAH defines a local hire as a trainee that resides in the same county as the SOMAH project. SOMAH defines a targeted hire as a trainee that is a resident of disadvantaged communities (per [CalEnviroScreen 3.0](#)),¹⁰ 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. The SOMAH PA will continue its targeted outreach to job training organizations that serve targeted populations and organizations located in SOMAH project areas. The SOMAH PA will also connect contractors to local job training organizations to foster direct hiring pipelines and employer-trainer relationships.

¹⁰At the time of this report the SOMAH PA is awaiting the approval of the final language to update from CalEnviroScreen 3.0 to 4.0.

Figure 12 map of the geographic distribution of SOMAH-eligible job training organizations and SOMAH project locations



Challenges identified and lessons learned in 2021

- *Trainees face numerous barriers to employment*
Through feedback from SOMAH's [Job Training Organization Task Force](#) and CBO partners, the SOMAH PA has continued to identify barriers to participation for job trainees and plan resources and services to support job seekers in accessing SOMAH job training opportunities and relevant careers. Some identified barriers include lack of a resume, lack of transportation, lack of tools needed on solar installation job sites, language barriers, and limited technology needed to access the SOMAH Job Training Portal. To begin to address these barriers, the SOMAH PA continued the career development event series by hosting an Interview Workshop in March 2021 and made updates to the Job Trainee Intake Form and Job Training Portal to make these resources more accessible and approachable to job seekers of all backgrounds. The SOMAH PA also developed a detailed guide to using the Job Training Portal.
- *Lack of awareness of SOMAH's job training opportunities*
SOMAH's CBO partners have increased capacity and engagement in job training outreach by conducting workshops to inform their communities about SOMAH's job training opportunities and connecting community members to local SOMAH-eligible job training organizations. In 2022, the SOMAH PA will continue to facilitate local CBO-JTO connections and support the CBOs in conducting local outreach activities. The CBO partners will also facilitate tenant education workshops and support tenants in applying for the job training opportunities.

2022 Objectives (to be achieved by December 2022)

1. Engage and confirm the eligibility of at least one SOMAH-eligible JTO in each county where an active or waitlisted SOMAH project is located or within a one-hour drive of the project location to support local hiring and continue to monitor project locations to target new JTOs.
2. Host at least four webinars focused on career development, safety, and job training requirements to support job trainees, tenants, and contractors in engaging in successful job training experience.
3. Identify contractor hiring and workforce needs and challenges by issuing a workforce needs assessment survey with at least 50% response rate.
4. Increase page visits to the Job Training Portal by 20% from 2021 to 2022 by launching and marketing a Resources page with free solar training courses on the Job Training Portal.
5. Increase the percentage of job trainees that have resumes uploaded in the resume bank on the Job Training Portal to 50%.
6. Ensure that at least 50% of SOMAH job trainees confirmed in job training affidavits submitted in 2022 are local or targeted hires (defined by the Local and Targeted Hiring Guidelines, SOMAH Program Handbook Section 2.6) by doing targeted outreach to JTOs local to SOMAH projects and JTOs that serve targeted populations.



7. Ensure that at least 50% of SOMAH job trainees confirmed in job training affidavits submitted in 2022 live in DACs by doing targeted outreach to JTOs that serve DACs.

2022 Audiences and Main KPIs

Audiences	Main KPIs
<ul style="list-style-type: none">● Prospective job trainees● Job training organizations● Tenants of SOMAH properties● Communities reached by CBO partners● Contractors facilitating the job training requirements	<ul style="list-style-type: none">● % of completed projects that provided paid job training opportunities● % of SOMAH projects with a local JTO in the same county or within a one-hour drive of the project location● Number of new JTOs added to the JTO Directory in 2022● Number of new job trainees signed up on the SOMAH Job Training Portal● % of job trainees in DACs● % of job trainees that are local/targeted hires● Number of visits to the SOMAH Job Training Portal● % increase of visits to the SOMAH Job Training Portal● Webinar/workshop attendance rate (%)● Survey response rate (%)



2022 Activities

No.	Activity	Channels/Tools	Audience	Duration
3.1	Conduct outreach to JTOs in high project volume regions, JTOs that serve DACs, and JTOs that serve targeted populations to encourage their students/trainees to join SOMAH's Job Training Portal and resume bank	<ul style="list-style-type: none"> Direct phone calls Direct emails Job training presentations Referrals from other JTOs and contractors 	<ul style="list-style-type: none"> JTOs 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
3.2	Host 4 webinars on career development topics, safety, and overview of job training requirements	<ul style="list-style-type: none"> Webinars 	<ul style="list-style-type: none"> Job trainees JTOs Contractors 	<ul style="list-style-type: none"> Q1-Q4 Quarterly
3.3	Issue a workforce needs assessment survey to SOMAH-eligible contractors	<ul style="list-style-type: none"> Survey 	<ul style="list-style-type: none"> Contractors 	<ul style="list-style-type: none"> Q1-Q4 Launching in Q2
3.4	Launch job trainee monthly newsletter through Job Training Portal	<ul style="list-style-type: none"> Direct emails 	<ul style="list-style-type: none"> Job trainees 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
3.5	Launch and market the Resources page on the Job Training Portal	<ul style="list-style-type: none"> CalSOMAH.org Job trainee newsletter Social media Direct emails 	<ul style="list-style-type: none"> Job trainees Contractors 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
3.6	Educate tenants about job training opportunities and connect them to local JTOs with support from CBO partners	<ul style="list-style-type: none"> Tenant education workshops Tenant education materials 	<ul style="list-style-type: none"> Tenants CBOs 	<ul style="list-style-type: none"> Q1-Q4 Ongoing

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

Overview

The primary objective of tenant education is to ensure tenants living in potentially eligible SOMAH buildings and tenants living in buildings participating in SOMAH are aware of and able to benefit from SOMAH in an equitable manner. The goals of tenant education also are to ensure tenant safety, reduce tenant confusion and discomfort during installation, and help center community voices. To do this work, the SOMAH PA continues to work closely with the program's five CBO partners, who help support tenant education by conducting community and tenant outreach, creating materials, and supporting contractors and property owners with Tenant Education Services.

Community-based organization partnerships

In Spring 2021, the SOMAH PA and its current CBO partners began working to recruit additional CBOs in areas that have been identified as harder to reach throughout California. The SOMAH PA aims to formalize partnerships with three new CBOs by Q1 2022 in the following regions: Central Coast, Los Angeles County, and Orange County.

In 2021, CBOs organized and/or attended 18 more in-person outreach activities (ensuring that COVID-19 safety protocols were adhered to). Additionally, in 2021, CBOs began to support the SOMAH PA's stakeholder outreach to local and regional government entities. (See Goal 5 for full details.)

Tenant education

In 2021, CBO partners and the SOMAH PA launched Tenant Education Services — an opportunity for property owners and/or contractors to receive free direct support to complete their tenant education requirements. Property owners were made aware of this offering via direct emails, and information about this service was added to all property owner and contractor-facing webinars including contractor training, tenant education training, and Public Forums.

In September 2021, the SOMAH PA and CBO partners completed the first Tenant Education Services with a series of workshops at a property in Stockton, CA. The SOMAH PA worked closely with the contractor and on-site property manager to support the property and resident needs and adhere to COVID-19 safety protocols. The result was



four outdoor workshops over three days, with materials tailored to serve a range of needs including residents who had special needs, youth (CBO partner led), and residents with limited access to technology. SOMAH's job training opportunities were also highlighted to ensure interested tenants were able to create job training portal accounts in real time. The takeaways from the first tenant education workshop have highlighted the need to expand the program's tenant education scope to meet tenants where they are at but also consider special needs and a diverse range of needs. Efforts will focus on identifying barriers to accessing SOMAH's job training opportunities that may exist for tenants, including the job training portals requirement of resumes.

Lastly, activities in 2022 will focus on reviewing tenant education survey results and use the findings to revise the current tenant education materials and approach to better serve all tenants. The SOMAH PA believes the program must meet tenants and stakeholders where they are at and is committed to ensuring all tenants are able to take full advantage of SOMAH's benefits.

Priorities for this audience this year and key strategies

- *Increase property owner and/or contractor engagement with Tenant Education Services*

In 2022, the SOMAH PA, with the support of its CBO partners, intends to continue progress around Tenant Education (TE) Services by building upon the insight gained from the TE Services' workshops conducted in 2021. The goal is to increase communications around support offered via TE Services and implement one-on-one follow-ups with contractors and property owners, encouraging them to take advantage of the free offering. Ultimately all approaches, strategies, and resources the SOMAH PA and its CBO partners share with contractors and property owners have the goal of helping them easily and thoroughly meet tenant education requirements. CBOs will continue to help refine and develop tenant engagement strategies.

- *Revise and expand tenant education material to meet the needs of different tenant demographics*

In 2022, efforts will continue to focus on developing and disseminating materials that ensure SOMAH benefits are clear and digestible to all tenants and center on culturally and linguistically relevant materials. This includes creating a series of videos engaging tenants around energy efficiency and energy conservation as well as a curriculum tailored to youth, special needs, and tenants with limited access to technology.

- *Increase CBO partnerships to include CBO partners in harder to reach or gap*



areas across the state

In 2021, the SOMAH PA began pursuing new partnerships with CBOs to help expand knowledge and awareness about the SOMAH Program in harder to reach and gap areas. In 2021 the SOMAH PA contracted with one new CBO partner. These efforts will continue in 2022 with the intention of forming partnerships that allow for communities and organizations to be informed about the existence of the SOMAH Program and the benefits and opportunities that it provides. As with the updating of TE materials and the expansion of TE Services, these partnerships will support the SOMAH PA in engaging with residents by prioritizing equity and accessibility through all ME&O efforts, such as providing direct outreach to tenants, JTOs, and potential job trainees.

Challenges identified and lessons learned in 2021

- *Lack of awareness by property owners of the tenant education requirements*
Lack of awareness of TE requirements is most prevalent in Track B projects, which are led by contractors who are often willing to support the requirements but may need support to do so.
- *Accessibility still impacted by COVID-19 safety protocol*
Tenant education requirements are limited to digital or passive outreach to tenants. Many project participants have avoided in-person workshops to reduce safety risks. Tenants and community members have varying access to the internet, which makes webinars and online training a limiting option.
- *Administration of current tenant education requirements*
The current tenant education requirements are designed to be flexible based on the capacity of property owners. This has resulted in an inconsistency in tenant education, allowing some properties to receive robust engaging workshops, while others receive more passive outreach.
- *Need to increase awareness around tenant's job trainee eligibility*
While tenants are eligible as job trainees, there is not consistent direct outreach ensuring that they are aware of the job training opportunities early enough to apply and participate. Additionally, since tenants do not need to have prior solar training to apply to be job trainees, often they may not. As interest and demand for more in-person Tenant Education Services increase, more SOMAH PA and CBO capacity is needed. Consideration should be given to using tenant ambassadors focused on building tenant capacity and understanding SOMAH benefits.



2022 Objectives (to be achieved by December 2022)

1. Continue to hold four quarterly Tenant Education Training Webinars for property owners, contractors, and CBOs, hosted by the SOMAH PA.
2. Ensure that 10% of projects in the SOMAH pipeline take advantage of the Tenant Education Services via direct outreach to all projects in the pipeline.
3. Conduct at least five tenant education survey evaluations for at least one completed SOMAH project/property in each IOU territory.
4. Conduct at least three tenant education focus groups with 5-8 participants to help inform tenant education materials and strategies.
5. Review and revise tenant education materials as needed based on tenant education surveys and five focus groups through 2022.
6. Create at least two tenant education videos that address energy conservation, utility rate structure, and SOMAH overview, and ensure it is utilized in four Tenant Education Training Webinars.
7. Leverage SOMAH CBO and JTO partnerships to ensure at least 5% of SOMAH job training opportunities come from DAC communities.
8. Increase tenant participation in job training opportunities to 10% of hired job trainees by working directly with contractors to encourage local hiring by providing regional workshops.

2022 Audiences and Main KPIs

Audiences	Main KPIs
<ul style="list-style-type: none">● Potential SOMAH tenants● Tenants in properties enrolled in SOMAH● Tenants interested in job training opportunities● Community-based organization partners● Contractors● Property owners	<ul style="list-style-type: none">● Number of Tenant Education Services Workshops 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 views for tenant education videos● 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● Qualitative survey data● Number of CBOs participating in program



2022 Activities

No.	Activity	Channels/Tools	Audience	Duration
4.1	Educate participating property owners and contractors about tenant engagement and prepare them to comply with tenant education requirements	<ul style="list-style-type: none"> Workshops Webinars Flyers Emails Phone calls 	<ul style="list-style-type: none"> Property owners Contractors CBOs 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
4.2	Continue CBO and SOMAH PA facilitated Tenant Education Services 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 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
4.3	Work with CBOs to educate property owners on how to inform tenants about program benefits and job training opportunities	<ul style="list-style-type: none"> Workshops Newsletters Email blasts 	<ul style="list-style-type: none"> Property owners 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
4.4	Identify barriers/challenges for tenants in participating in job trainee opportunities	<ul style="list-style-type: none"> Survey Interviews Focus groups 	<ul style="list-style-type: none"> Tenants in SOMAH buildings 	<ul style="list-style-type: none"> Q2 and Q4 Semiannual June and Dec.
4.5	Evaluate and optimize tenant education content on CalSOMAH.org aimed at tenants. Monitor trends and continually optimize the site and materials to facilitate a clear user path and determine content additions and enhancements	Print materials: <ul style="list-style-type: none"> Simple Ways to Save Energy What to Expect with SOMAH How Will Your Bill Change? Get Paid to Install Solar on Your Building 	<ul style="list-style-type: none"> Tenants in SOMAH buildings 	<ul style="list-style-type: none"> Q1-Q3 Ongoing



		<ul style="list-style-type: none"> • How Solar Energy Works • Installation Timeline 		
4.6	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 • CalSOMAH.org 	<ul style="list-style-type: none"> • Interested public • Stakeholders • Tenants • Property owners 	<ul style="list-style-type: none"> • Q1-Q4 • Ongoing
4.7	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.org • Tenant workshops 	<ul style="list-style-type: none"> • Tenants in SOMAH building 	<ul style="list-style-type: none"> • Q1-Q4 • Ongoing

Goal 5: Ensure stakeholders are informed and help to co-market the program

Overview

The SOMAH Program relies on stakeholder partnerships to ensure the program is marketed effectively across the state. SOMAH's central objective with stakeholders is increasing program awareness and credibility through co-marketing and cross-promotion with existing, trusted stakeholder programs. SOMAH stakeholders include IOUs; city, county, and state government offices (both appointed and elected); CCAs; California energy efficiency program administrators; and regional organizations or regional energy networks (RENs).

Due to the strain of the COVID-19 pandemic on stakeholders, SOMAH limited its outreach to stakeholders in 2020. In 2021, many stakeholders, especially local governments, began post-pandemic re-opening. Many local governments came out of the pandemic with a focus on job creation and sustainable development. This focus created an opportunity to align SOMAH's stakeholder engagement with stakeholder goals. In early 2021 the SOMAH PA created a revised stakeholder outreach plan that focused on building brand awareness about SOMAH within local governments and establishing co-marketing partnerships with local governments, CCAs, and IOUs to promote SOMAH through trusted entities. Later in 2021, the SOMAH PA expanded its goals to include creating partnerships with energy efficiency programs to promote "stacking" complementary incentive programs. Local governments were generally interested in partnering or co-marketing with SOMAH to increase participation within their city/county/region.

In 2021, SOMAH built its brand awareness through presentations to the Local Government Commission and direct outreach to local government sustainability offices. The SOMAH PA also presented to stakeholder audiences at the California Climate & Energy Collaborative, Resilient SLO, and the California Polytechnic State University Climate Solutions Now conference. SOMAH established co-marketing efforts with local and regional stakeholders including the Tri-County Regional Energy Network (3C-REN) and Bay Area Regional Energy Network (BayREN), along with Switch Is On and Energy Savings Assistance - Common Area Measures (ESA CAM) programs through IOUs. These partnerships help encourage property owners to complete energy efficiency and decarbonization efforts through other multifamily incentive programs.



In 2022, the SOMAH PA will deploy several strategies to meet its objectives with this audience. First, SOMAH PA will continue its relationship development with contacts made in 2021. Second, the SOMAH PA will continue outreach to new local (city/county/regional) government offices working in sustainability, energy, and climate action planning. Messaging for this outreach will focus on post-COVID-19 economic recovery and sustainability efforts that SOMAH can support. Third, the SOMAH PA will work with RENs and ESA CAM to co-market energy efficiency programs in partnership with SOMAH. Fourth, SOMAH will continue its partnerships with IOUs and CCAs to directly target property owners in outreach. Fifth, the SOMAH PA has updated its contract with its existing CBOs to include outreach to local government (including elected and appointed offices), increasing the SOMAH PA's outreach to these audiences.

Priorities for this audience this year and key strategies

- *Increase property owner pipeline through co-marketing and stakeholder or energy efficiency partnerships*

The SOMAH PA intends to increase its pipeline through co-marketing/advertising with EE programs that are already marketing to properties that might qualify for SOMAH. This will be accomplished by developing co-branded materials and exploring co-hosted programming.
- *Attain direct promotion opportunities through local government and IOUs*

Similar to the previous priority, the SOMAH PA will identify opportunities to promote SOMAH via guest presentations, co-hosted webinars, web promotion, and social media promotion. This promotion will focus on local government entities and IOUs to build brand awareness and credibility through trusted sources.
- *Increase program awareness among local governments through CBO outreach*

Many of SOMAH's CBO partners have contacts with local government entities and will support efforts to conduct outreach about SOMAH and its success stories and impact. The SOMAH PA will prioritize outreach in the Central Valley and to DACs and elected officials across California — primarily city councils, county boards of supervisors, and mayors.
- *Name and fame program partners and co-marketers*

A strategy the SOMAH PA will incentivize partnerships by “naming and faming” or spotlighting stakeholders that help co-market and promote SOMAH. This spotlighting will take place via social media and success stories, to build program awareness, opportunities for cross-promotion, and credibility.

Challenges identified and lessons learned in 2021 for engaging stakeholders include:

- *Lack of program awareness*

The Phase II third-party evaluation and internally administered surveys indicate that SOMAH needs to increase its brand awareness. These evaluations indicated that multifamily affordable housing owners and managers may not be aware of the SOMAH Program because it is relatively young and serves a niche portion of California's rental population.
- *Lack of capacity and clarity on authority to pursue co-marketing partnerships*

Many stakeholders, especially local governments, have limited capacity to do direct outreach in partnership with SOMAH. To meet these stakeholders where they are at, the SOMAH PA has made an effort to identify and offer a suite of co-marketing options that vary in scope. Additionally, trying to identify the right point of contact and decision-makers to approve co-marketing efforts has been



a challenge — many contacts have limited authority to approve co-marketing efforts.

- *Limited information on program impact*

Because only a small set of SOMAH projects have recently been completed, the SOMAH PA has limited information and materials available on SOMAH's impact. In 2022, as more projects come to completion and receive interconnection, the SOMAH PA will create more materials, including case studies and success stories to share meaningful metrics for stakeholder audiences. These include metrics that focus on tenant savings, job creation, and CO₂ offsets.

2022 Objectives (to be achieved by December 2022)

1. Conduct direct outreach to 10 government and legislative offices in DACs where there are identified eligible properties based on 2021 data.
2. Conduct direct outreach to five elected officials whose jurisdictions have had completed SOMAH projects.
3. Work with multifamily energy efficiency programs to do two co-branding or co-marketing efforts.
4. Work with investor-owned utilities to do one form of direct outreach to property owners within each utility company territory.
5. Work with SOMAH's five CBOs to conduct local government outreach to three elected officials for promotional opportunities.
6. Partner with one local government or county in a DAC to release a newsletter or earned media piece about SOMAH.

2022 Audiences and Main KPIs

Audiences

- Investor-owned utilities (IOUs)
- Community choice aggregators (CCAs)
- State government and legislative officials
- Local governments (city and county electees, associations and agencies/offices)

Main KPIs

- Number of new engaged stakeholders contacted/added to Salesforce database
- Number of co-marketing partnerships with multifamily energy efficiency programs
- Number of co-marketing partnerships with IOUs
- Number of presentations given
- Number of co-marketing partnerships that serve DACs
- Number of stakeholder websites promoting SOMAH
- Number of SOMAH web references by partners



2022 Activities

No.	Activity	Channels/Tools	Audience	Duration
5.1	Present about SOMAH at local government events including LGC forums and REN and IOU workshops	<ul style="list-style-type: none"> Virtual conferences, trade shows, & job fairs 	<ul style="list-style-type: none"> Local government CCAs IOUs 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
5.2	Name and fame partner programs and offices on social media	<ul style="list-style-type: none"> Social media - organic 	<ul style="list-style-type: none"> Local government IOUs RENs CCAs 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
5.3	Continue revising stakeholder toolkit on website to be more customizable and easier to use	<ul style="list-style-type: none"> Partner toolkit CalSOMAH.org 	<ul style="list-style-type: none"> Local government IOUs RENs CCAs 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
5.4	Provide UTMs to calsomah.org for partners to include on their websites and track UTMs and locations that are using them	<ul style="list-style-type: none"> Partner backlinks 	<ul style="list-style-type: none"> Local government IOUs RENs CCAs 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
5.5	Present or co-host webinars with stakeholders to talk about SOMAH to market SOMAH to property owners	<ul style="list-style-type: none"> Virtual workshops & meetings 	<ul style="list-style-type: none"> Local government IOUs RENs CCAs 	<ul style="list-style-type: none"> Q1-Q4 Ongoing

Evaluation & Reporting

Since SOMAH's launch in July 2019, the SOMAH PA has collected data on program metrics and key performance indicators (KPIs) outlined in annual ME&O Plans. Rather than providing individual KPIs by activity, a set of KPIs are established for each ME&O goal to assess the SOMAH PA's success more directly in achieving each goal. The SOMAH PA will carry out several evaluation tactics throughout 2022 to track the success and impact of ongoing ME&O efforts. The SOMAH PA will evaluate its 2022 ME&O efforts by 1) surveys and focus groups of SOMAH's audiences, 2) quarterly KPI reviews, 3) the Semiannual Progress Report, and 4) recommendations from SOMAH's Phase II third-party evaluation. These four components are outlined in this section. The SOMAH PA will continue to gather feedback through workshops and quarterly Public Forums to improve upon ME&O approaches and the SOMAH Program overall. SOMAH's Advisory Council, Job Training Organization Task Force, and CBO partners will continue to provide guidance and oversight of the program's implementation, which includes ME&O strategies.

Surveys and Focus Groups

As SOMAH projects receive interconnection and complete the application process, surveys for property owners, tenants, contractors, and job trainees will be deployed to better understand their experience in participating in SOMAH. This will provide ongoing feedback into the efficacy of SOMAH's ME&O efforts on all its audiences. As these surveys will be coming in at various times throughout the year, the ME&O team will receive quarterly reports on the survey feedback, which the team will review and, if applicable, make changes to ME&O strategies. These surveys and their methodologies account for different outreach needs and approaches to each intended audience.

Quarterly KPIs

Over the course of 2022, 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. On a quarterly basis, the SOMAH PA will review KPI outcomes from the previous quarter. This review serves as an opportunity to shift or adjust ME&O efforts for the upcoming quarter(s) based on the efficacy demonstrated in the KPIs.

Semi-Annual Progress Report

SOMAH is required to report on program progress and key metrics semi-annually via the Semi-Annual Progress Report. This report is a comprehensive report that includes, ME&O progress and milestones, as well as application statistics, technical assistance, DAC participation statistics, and program planning and development updates.



Phase II third-party evaluation

The SOMAH PA has worked closely with SOMAH's third-party evaluator throughout both Phase I and Phase II of their program evaluation, using the findings of both final reports to review the program's ME&O strategies and tactics. With the recent release of the final [Phase II report](#) in September 2021, the SOMAH PA continues to work closely with the CPUC to identify opportunities to incorporate key recommendations into the program's ME&O efforts for 2022 and beyond. These opportunities for updates have been implemented throughout this document in the overarching strategies, goals, activities, and tactics for the 2022 ME&O efforts. These include streamlining and expanding SOMAH's technical assistance services; co-marketing with trusted entities such as IOUs and local/regional government offices and program administrators; and increasing participation by underserved communities and participant diversity.

The SOMAH PA will continue to reference, incorporate, and address key findings and recommendations from the Phase II third-party evaluation into future internal evaluation efforts. Taken together, feedback and input from key audiences, participants, stakeholders, and advisors will help inform and modify ME&O efforts to ensure the approaches are successful in reaching the audiences and communities SOMAH is designed to serve.

Appendix: Budget

Appendix: Budget Forecast		Total Forecast for 2022		
Category	Subtask	Labor	Non-Labor	Category Total
Marketing and Outreach	ME&O Admin	\$539,114	\$124	\$539,238
Marketing and Outreach	Website Development & Enhancements	\$284,440	\$2,892	\$287,332
Marketing and Outreach	Community Based Organization	\$183,147	\$878,309	\$1,061,455
Marketing and Outreach	Cooperative Marketing Efforts	\$168,578	\$10,000	\$178,578
Marketing and Outreach	Conferences	\$68,718	\$25,548	\$94,266
Marketing and Outreach	Tenant Engagement	\$67,982	\$20,006	\$87,988
Marketing and Outreach	Property Owner Engagement	\$241,671	\$60,500	\$302,171
Marketing and Outreach	Contractor Engagement	\$127,705	\$18,000	\$145,705
Marketing and Outreach	Contractor Training	\$40,203	\$0	\$40,203
Marketing and Outreach	Marketing Collateral Development	\$59,739	\$13,500	\$73,239
Marketing and Outreach	Communications	\$74,511	\$0	\$74,511
Marketing and Outreach	Media	\$78,048	\$22,748	\$100,797
Marketing and Outreach	ME&O Plan Development	\$66,531	\$0	\$66,531
Workforce Development	Cooperative Marketing Efforts	\$9,799	\$26,868	\$36,668
	Totals	\$2,010,186	\$1,078,496	\$3,088,681