



Solar on Multifamily
Affordable Housing

2023 Marketing, Education & Outreach Plan





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About the SOMAH Program

The SOMAH Program, launched in July 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.
- Installing 300 megawatts (MW) of solar generating capacity on multifamily affordable housing statewide by December 31, 2030.
- Providing direct financial benefits to tenants in the form of energy bill credits.
- Promoting 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 paid job training. An Advisory Council and Job Training Organization (JTO) Task Force provide input into program development and ensure the program maximizes benefits to the communities it serves. See the [SOMAH Program Handbook](#) and the [Semiannual 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 outlined in this plan prioritize the participation of [disadvantaged communities](#) (DACs)² and ensure geographically- and demographically-diverse participation from SOMAH audiences — solar contractors, property owners and job trainees — while educating and engaging tenants about SOMAH's opportunities and benefits.

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), and is supported by subcontracted community-based organizations.

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



About the 2023 SOMAH Marketing Education & Outreach Plan

This marketing, education and outreach (ME&O) plan will guide 2023 activities by the SOMAH Program Administrator (PA) team to reach its target audiences and support the overall program goals. This plan builds on the activities and learnings from the SOMAH launch and subsequent ME&O Plans, with updated strategies to address program gaps, challenges and opportunities to achieve program goals.

2022 Marketing, Education and Outreach in Review

In 2022, the SOMAH PA continued to improve and expand its outreach and marketing efforts. The SOMAH PA continued to keep most of its ME&O tactics remote. Key engagements included webinars for participants to review the program and its requirements and to cover more specialized topics, such as Technical Assistance, job training topics and co-marketing with local and regional government entities. Other engagements included providing updates and receiving feedback via public forums and most importantly, direct remote outreach to owners of potentially eligible properties.

The team also participated in and initiated several events to safely engage its audiences in-person. These included two project site visits and two ribbon-cuttings. The SOMAH PA continued to support completion of SOMAH projects via its tenant education services, an offering under the program's Technical Assistance (TA) and Support Services umbrella, and participated in panels, for example, at the 2022 RE+ Conference where the SOMAH PA team members and community-based organizations (CBOs) spoke with solar industry leaders about SOMAH at various booths and panels during the week-long event.

The SOMAH PA remained focused on developing solutions to bridge gaps with underrepresented populations in the program. It built off efforts that began in 2021 to expand SOMAH's CBO partnerships, and to leverage regional and local government stakeholder networks and investor-owned utilities (IOUs) to co-market the program. These relationships have helped increase awareness about the SOMAH Program and increased credibility through partnerships with trusted and existing entities administering related programs. Through these partnerships, the SOMAH PA also developed and disseminated success stories and case studies (aligned with recommendations from the Phase II third-party evaluation conducted in 2021), which helped share SOMAH's impact and success to potential applicants (property owners and contractors) and affordable housing communities across California.



Other key highlights from 2022 include:

- **Website Re-Design and Annual Web Traffic Growth**

On October 31st, SOMAH launched its new website, offering a simpler user experience, design and several new resources to navigate the application process and spur participation. In 2022, CalSOMAH.org saw a 42.4% increase in web traffic from 2021 with 92,754 total pageviews (25,467 first time visitors, 3,994 returning visitors).³

- **Social Media Presence Growth with CPUC and Paid Media Support**

SOMAH's social media followers increased from ~150 followers to 730 followers over the 2022 year, across all social media platforms. An Overview of SOMAH video shared by the California Public Utilities Commission on its social media channels led to a record-breaking⁴ 44,643 views. A paid property owner media campaign also helped increase follower numbers.

- **New Applications**

In 2022, the SOMAH Program saw **49** new applications⁵ representing **3.38 MW** of solar, of which **367** kW is allocated for projects in DACs. These new projects add to **71** projects have been completed and paid, with **264** more nearing completion.

Finally, the SOMAH PA acknowledges that the broader effects of COVID-19 across the economy and SOMAH-relevant industries, including supply chains, as well as impacts from environmental events like wildfires and from civil rights movements such as Black Lives Matter and Stop Asian Hate continue to form the greater context of the SOMAH PA's marketing and outreach, and are experienced most deeply by marginalized groups including Black, Indigenous and people of color and those in environmental and social justice communities in California — the communities that SOMAH is intended to serve.

Following is a more detailed review of the 2022 ME&O activities by goal and the outcomes of their related objectives.

³ Most visited pages were: 1) the SOMAH homepage - 9,598 visitors, 2) the About page - 3,053 visitors, 3) the property owner landing page from a paid media campaign - 2,097 visitors, and 4) the property owner web page - 2,048 visitors. Please note, with the new website, vanity URLs have changed for some pages and more pages were added, which will skew statistics past October 31, 2022. The three property owner pages from November 1st to December 30th had an additional 430 pageviews.

⁴ SOMAH videos average from 20-100 views annually

⁵ 15 applications were canceled.



2022 Goals and Outcomes

Goal 1: Engage property owners to build and maintain a multiyear pipeline of diverse projects		
Objective	Objective Achieved?	Outcomes
Overall progress to 300 MW goal	In progress: 21% to goal	<ul style="list-style-type: none"> Applications submitted in 2022: <ul style="list-style-type: none"> 49 applications <ul style="list-style-type: none"> 3.38 MW 1,850 tenant units 15 canceled applications Total active applications since 2019: <ul style="list-style-type: none"> 432 applications <ul style="list-style-type: none"> 63.5 MW 34,223 tenant units 21% of 300 MW goal achieved
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.	Yes	<ul style="list-style-type: none"> 1,762 affordable housing organizations contacted <ul style="list-style-type: none"> 454 DAC properties contacted 41 housing authorities contacted 10 tribal housing authority contacted Launched campaign directing to property owner landing page <ul style="list-style-type: none"> 50 forms completed. Upon form completion the SOMAH PA conducted direct outreach to assist individuals in submitting applications. To date an application

		has not been submitted.
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.	Yes	<ul style="list-style-type: none"> 65 total new subscribers. In 2022, we had a paid media campaign that brought in many more subscribers than normal. Subscription numbers were much lower during months that the campaigns were not running. Results from the campaigns produced: <ul style="list-style-type: none"> LinkedIn: 1,559 clicks & 320,875 impressions Facebook: 1,497 clicks & 146,870 impressions Google ads: 1,814 clicks & 178,067 impressions
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.	Yes	<ul style="list-style-type: none"> Six property owner facing webinars were conducted in 2022: <ol style="list-style-type: none"> <i>Pathway to Low-Cost Low-Carbon Apartments</i> - hosted by BayREN (59 registered, 49 attendees) <i>SOMAH Technical Assistance and Support Services Overview</i> (18 registered, 4 attendees) <i>Solar 101 Institute: Intro to Solar PV for Multifamily Affordable Properties</i> (131 registered, 61 attendees) <i>Solar 101 Institute: Solar PV Implementation Case Studies and Financing Forum</i> (131 registered, 36 attendees) <i>Save Money & Go Green: How to Bring Clean Energy to Multifamily Affordable Housing</i> - hosted by 3CREN (27 registered, 25 attendees) <i>Future Proof your Multifamily Property with Energy Upgrades</i> - hosted by Marin Community Energy (27 registered, 25 attendees)

<p>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.</p>	<p>Yes</p>	<ul style="list-style-type: none"> Established co-marketing relationships with the following organizations: <ul style="list-style-type: none"> California Housing Finance Agency (CalHFA) HCD California Indian Assistance Program (CIAP) California Coalition for Rural Housing (CCRH) Tribal Technical Assistance Team BayREN Program Team 3CREN Program Team
<p>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.</p>	<p>Yes</p>	<ul style="list-style-type: none"> Participated in the following conferences: <ul style="list-style-type: none"> Housing California Conference Southern California Association for Non-Profit Housing (SCANPH) Conference California Coalition for Rural Housing (CCRH) Rural Housing Summit San Diego Housing Federation (SDHF) Conference Ventura HOME Conference HCD Pala Tribal Housing Roundtable
<p>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.</p>	<p>No</p>	<ul style="list-style-type: none"> 51 of 432 applications (11%) received Technical Assistance and Support Services. The new website was launched on October 31, 2022 with SOMAH TA and Support Services all in one place with a central request form.

Goal 2: Continue to build a robust and diverse contractor base and support eligible contractor retention		
Objective	Objective Achieved?	Outcomes
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).	Yes	<ul style="list-style-type: none"> • Outreach was continuously conducted in geographic gap regions for attendance to the Eligibility Trainings. • 22 new contractors have been added from the list of potential contractors.
Enroll at least one contractor as an eligible contractor in each area identified in Objective 1.	No	<ul style="list-style-type: none"> • Four out of five regions had contractors complete the contractor eligibility process: Central Valley (PG&E & SCE) and Liberty Utilities. • The PacifiCorp service territory has a small number of contractors and SOMAH has not yet been able to obtain participation from contractors in the region.
Increase application submissions by at least four nonparticipating contractors.	No	<ul style="list-style-type: none"> • One new contractor submitted applications.
Hold at least one focus group composed of nonparticipating contractors and/or subcontractors to identify barriers and challenges to participation.	Yes	<ul style="list-style-type: none"> • Individual interviews were completed from May to July 2022, with the following participants: <ul style="list-style-type: none"> ◦ 5 subcontractors ◦ 2 prime contractors
Hold at least five Contractor Eligibility Trainings.	Yes	<ul style="list-style-type: none"> • Six eligibility trainings were conducted in 2022: <ol style="list-style-type: none"> 1. January: 19 registered, 10 attendees, 3 new contractors 2. March: 28 registered, 12 attendees, 4 new contractors

		<ol style="list-style-type: none"> 3. May: 27 registered, 10 attendees, 4 new contractors 4. July: 23 registered, 12 attendees, 0 new contractors 5. September: 47 registered, 9 attendees, 4 new contractors 6. December: 44 registered, 20 attendees, 7 new contractors
Advertise SOMAH in at least one diverse contractor association or publication.	Yes	<ul style="list-style-type: none"> • Advertising of December Eligibility Training in <i>San Francisco Bay View</i>, <i>National Black Newspaper</i>. • Social media ads <ul style="list-style-type: none"> ◦ Facebook: 10 clicks ◦ Instagram: 7 clicks ◦ Twitter: 9 clicks • Digital newspaper ads <ul style="list-style-type: none"> ◦ Ad clicks: 46 clicks
Match subcontractors to applications that would like a third-party contractor to assist with PV installation.	Yes	<ul style="list-style-type: none"> • 10 subcontractors were matched with prime contractors.

Goal 3: Ensure sufficient job trainee participation and preparation for SOMAH job training opportunities and relevant solar careers		
Objective	Objective Achieved?	Outcomes
Engage and confirm the eligibility of at least one SOMAH-eligible job training organization (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.	No	<ul style="list-style-type: none"> 63% of SOMAH projects had a JTO in the same county.
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.	Yes	<ul style="list-style-type: none"> The SOMAH PA hosted five webinars in 2022, alternating audiences from contractors to job seekers and job trainees: <ol style="list-style-type: none"> Inclusive Hiring Practices Webinar for contractors (32 registered, 24 attendees) Solar Career Pathways Webinar for job seekers (44 registered, 31 attendees) Job Training Requirements Overview for contractors (20 registered, 5 attendees) Salary Negotiation Webinar for job seekers (36 registered, 25 attendees) Solar Career Pathways: A Solar Installer's Career-Changing Journey for job seekers (34 registered, 20 attendees)
Identify contractor hiring and workforce needs and challenges by issuing a workforce needs assessment survey with at least 50% response rate.	No	<ul style="list-style-type: none"> The survey is in final stages of development and the SOMAH PA plans to launch the survey in Q1 of 2023

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.	No	<ul style="list-style-type: none"> The number of annual page visits to the Job Training Portal increased by 14% from 2021 to 2022 through increased engagement with job trainees using the Portal. The SOMAH PA built out a new Solar Careers webpage on CalSOMAH.org, which directs job seekers to use the Job Training Portal.
Increase the percentage of job trainees that have resumes uploaded in the resume bank on the Job Training Portal to 50%.	No	<ul style="list-style-type: none"> 26% of job trainees in the Job Training Portal have uploaded a resume to the resume bank.
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.	Yes	<ul style="list-style-type: none"> 85% of SOMAH job trainees meet the local or targeted hire definition
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.	No	<ul style="list-style-type: none"> 40% of SOMAH job trainees live in DACs, which is an increase from the percentage reported in 2021 (26.67%)

Goal 4: Educate SOMAH-eligible tenants and tenants living in participating SOMAH properties about the program and how to maximize their benefits		
Objective	Objective Achieved?	Outcomes
Continue to hold four quarterly Tenant Education Training Webinars for property owners, contractors and CBOs, hosted by the SOMAH PA.	Yes	<ul style="list-style-type: none"> Held three tenant education webinars. In place of a fourth webinar the Q3 Public Forum was centered around informing attendees of the proposed/upcoming tenant education requirement changes. <ul style="list-style-type: none"> February: 23 registered, 9 attendees June: 38 registered, 8 attendees August: 14 registered, 4 attendees August (public forum): 88 registered, 40 attendees
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.	No	<ul style="list-style-type: none"> 10 (2% of all active applications) projects utilized TE services
Conduct at least five tenant education survey evaluations for at least one completed SOMAH project/property in each IOU territory.	Yes	<ul style="list-style-type: none"> Surveys were deployed to 10 completed SOMAH projects <ul style="list-style-type: none"> Pilot survey sent to one project in February (30 individual surveys sent, 9 responses) Full survey sent to nine projects in November (695 individual surveys sent, outcomes will be shared in 2023 pending statistical significance)
Conduct at least three tenant education focus groups with 5-8 participants to help inform tenant education materials and strategies.	See outcomes column	<ul style="list-style-type: none"> Focus groups were shifted to 15 one-on-one phone interviews between May and June, with individuals living in affordable housing.

Review and revise tenant education materials as needed based on tenant education surveys and five focus groups through 2022.	No	<ul style="list-style-type: none"> Revisions to TE materials will be made once the analysis of feedback from surveys is complete.
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.	Yes	<ul style="list-style-type: none"> Tenant SOMAH Overview video was created, with a total of 59 views online to-date Energy conservation video was created in English and Spanish (fully launched in Q1 2023) The PA is disseminating videos through webinars and tenant education workshops
Leverage SOMAH CBO and JTO partnerships to ensure at least 5% of SOMAH job training opportunities come from DAC communities.	Yes	<ul style="list-style-type: none"> In 2022, 53% of SOMAH job training opportunities were in DACs
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.	No	<ul style="list-style-type: none"> In 2022, 9% of SOMAH job training opportunities were obtained by tenants

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

SMARTIE Objective	Objective Achieved?	Outcomes
<p>Conduct direct outreach to 10 government and legislative offices in DACs where there are identified eligible properties based on 2021 data.</p>	<p>Yes</p>	<ul style="list-style-type: none"> • Scheduled meetings & presentations with government offices in seven (7) cities (San Luis Obispo, Richmond, Chula Vista, Berkeley, Fremont, Santa Paula, and Pomona) and three (3) counties (Contra Costa, San Diego, and Los Angeles). This outreach was completed by the stakeholder team and does not include outreach efforts conducted by CBOs, as described under the CBO government outreach section. • Reached 60+ government staff through a Local Learning Resource Network (LERN) webinar with CivicWell. This activity led to making direct connections with the cities of Fremont, Costa Mesa, and Berkeley. • Speaking opportunities to two local advocacy groups which led to additional local government and stakeholder connections • Participated in conferences related to main stakeholder groups (elected officials, government staff and other related stakeholders): <ul style="list-style-type: none"> ◦ US Dept of Energy Better Building Summit ◦ CCEC Poster Session at the 13th Annual California Climate & Energy Forum ◦ “Equity and Just Access For All: Highlighting Successful Low and Moderate Income Solar Programs” panel at RE+ Conference ◦ Central Coast Sustainability Summit - panel presentation (Connections were made with the City of Thousand Oaks to discuss their SOMAH

		<p>potential, Stakeholder team plans to follow up with city in 2023)</p> <ul style="list-style-type: none"> San Diego Green Building Council Conference - panel presentation, resulted in direct new connections made with the Smart Energy Homes program, the cities of Chula Vista, Carlsbad, and Encinitas (Stakeholder team plans to follow up with City of Carlsbad and Encinitas in 2023)
Conduct direct outreach to five elected officials whose jurisdictions have completed SOMAH projects.	No	<ul style="list-style-type: none"> Conducted direct outreach to four elected officials <ol style="list-style-type: none"> Mary Salas, City of Chula Vista Mayor Nora Vargas, County of San Diego Board of Supervisors, District 1 Office Dawn Rowe, San Bernardino County Board of Supervisor, District 3 Office Paul Cook, San Bernardino County Board of Supervisor, District 1 Office
Work with multifamily energy efficiency programs to do two co-branding or co-marketing efforts.	Yes	<ul style="list-style-type: none"> Coordinated with PG&E and SCE on their Single Point of Contact (SPOC) and Energy Saving Assistance: Common Area Measures (ESA CAM) programs. Co-marketed with RENs to co-host webinars and promote in marketing channels <ul style="list-style-type: none"> BayREN (co-hosted webinar, contractor webinar announcement, newsletter announcement, co-created case study in development) SoCalREN (co-hosted webinar, contractor newsletter blast)
Work with investor-owned utilities to do one form of direct outreach to property owners within each utility	No	<ul style="list-style-type: none"> Maintained co-marketing partnerships with Liberty, PacifiCorp, PG&E, SCE and SDG&E

company territory.		<ul style="list-style-type: none"> ○ Gathered IOU logos to post on the SOMAH website to demonstrate collaboration ● Presented to PG&E hosted virtual event <i>Income Qualified & Clean Energy Workshop</i> to IOU and other programs on November 9, 2022.
Work with SOMAH's five CBOs to conduct local government outreach to three elected officials for promotional opportunities.	Yes	<ul style="list-style-type: none"> ● CEJA <ul style="list-style-type: none"> ○ Conducted direct outreach to four San Bernardino County Board of Supervisor offices ○ Connected the SOMAH PA to Supervisors Cook and Rowe's representatives. ● OC Goes Solar <ul style="list-style-type: none"> ○ Conducted direct outreach to the cities of Santa Ana, Irvine (City Council), and Buena Park and Supervisor Katrina Foley from the Orange County Board of Supervisors, District 3 Office (featured in Supervisor Foley's Weekly Newsletter Update to Orange County residents and stakeholders ● SHE <ul style="list-style-type: none"> ○ Conducted direct outreach to Supervisor Eddie Valero from the Tulare County Board of Supervisors, District 4 Office. This led to presenting to the Tulare County Board of Supervisors meeting (approval for use of the Tulare County logo for marketing) ● APEN <ul style="list-style-type: none"> ○ Conducted direct outreach and connected stakeholder's team to RYSE Resilience Hub, the cities of Richmond and Oakland, Marin Clean Energy, the Healthy Homes and Resilient Communities Working Group, and the City of San

		<p>Francisco Mayor's office</p> <ul style="list-style-type: none"> Community Environmental Council (CEC) <ul style="list-style-type: none"> Conducted direct outreach to the City of Oxnard Presented at the Central Coast Climate Justice Network and North Santa Barbara County Coalition about SOMAH Submitted an application for and co-presented with SOMAH at a panelist presentation at the Central Coast Sustainability Summit.
Partner with one local government or county in a DAC to release a newsletter or earned media piece about SOMAH.	Yes	<ul style="list-style-type: none"> Published in the City of Chula Vista's November Newsletter highlighting completed project and ribbon cutting CivicWell included an article on SOMAH in CURRENTS, its quarterly publication engaging about 3,000 staff with local governments throughout the state.



Property Market Analysis & Program Participation

The SOMAH PA completed multifamily affordable housing market research in 2023, to build upon prior analyses conducted by the California Housing Partnership Corporation (CHPC). This research, along with the PA's audience-specific expertise, helps inform ME&O strategies. To develop targeted marketing and outreach strategies, this analysis was expanded to regions with high concentrations of SOMAH-eligible DAC properties. Additionally, this research focused on underserved geographic regions and provided insights on specific historically underserved subpopulations – which included tribal entities and rural housing properties. The 2023 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.

SOMAH Eligible Properties Map

The SOMAH PA continues to use CHPC's preservation database to create and maintain the SOMAH [Eligible Properties Map](#) – an interactive tool that allows users to search for potentially-eligible properties across the state. It includes features such as the number of affordable housing units per property, if the property is located in a DAC, and street address. The PA has updated the map to include the status of a property's enrollment in the SOMAH Program (i.e., SOMAH enrolled vs. non-SOMAH enrolled) to ensure that the map serves as a more thorough lead generation tool for contractors and stakeholders.

Analysis of Potentially SOMAH-Eligible Properties

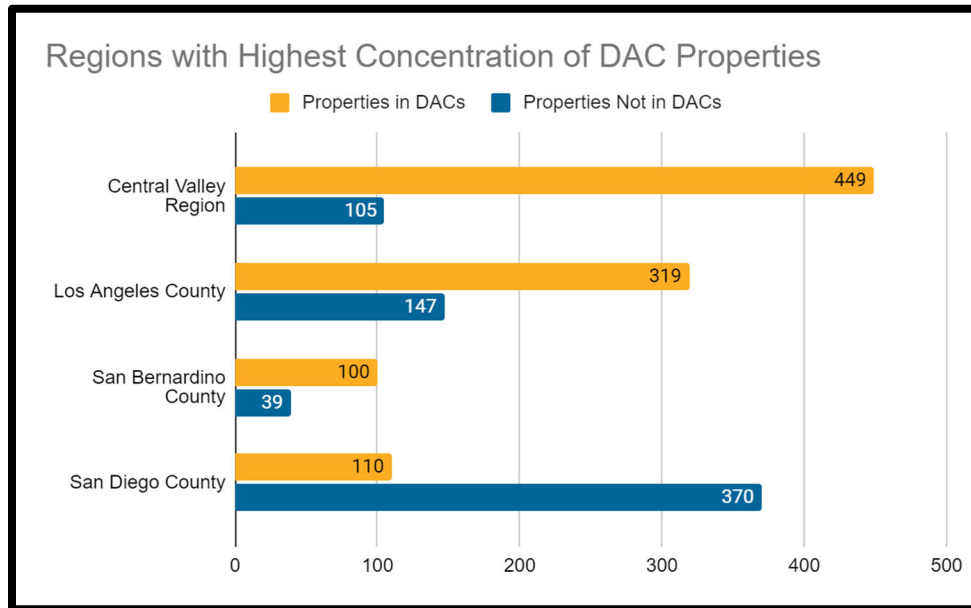
Analysis of the CHPC's Affordable Housing Preservation Database reveals that there are approximately 4,028 potentially eligible properties. The universe of potentially SOMAH-eligible properties includes properties in the partnership's database that meet the following SOMAH Program requirements: 5+ units, 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 include 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" as a full eligibility review with a submitted SOMAH application is necessary to confirm criteria are actually satisfied.

Properties in DACs and High-Priority Regions

Approximately **36.8% (1,484)** of all potentially SOMAH-eligible properties are located in DACs as defined by CalEnviroScreen 3.0 and 4.0. The Central Valley has the highest concentration of potentially SOMAH-eligible DAC properties, with approximately **81% (449)** of the region's potentially eligible properties located in DACs. Other regions of focus with high concentrations of properties in DACs include Los Angeles, San Diego and San Bernardino counties. As the SOMAH PA continues to develop outreach strategies to boost program participation in DACs, the Central Valley region⁶ remains a high-priority region.

⁶ SOMAH's definition of Central Valley includes the following counties: Fresno, Kern, Kings, San Joaquin, Tulare, Stanislaus, Madera, & Merced

Figure 1: Regions with Highest Concentration of Properties in DACs



DAC Designation Expansion

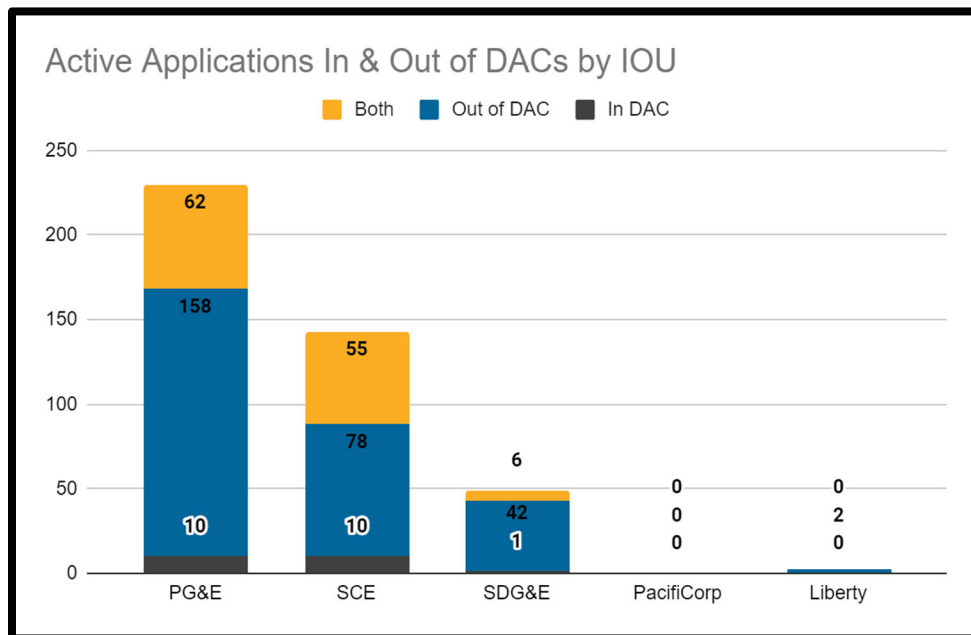
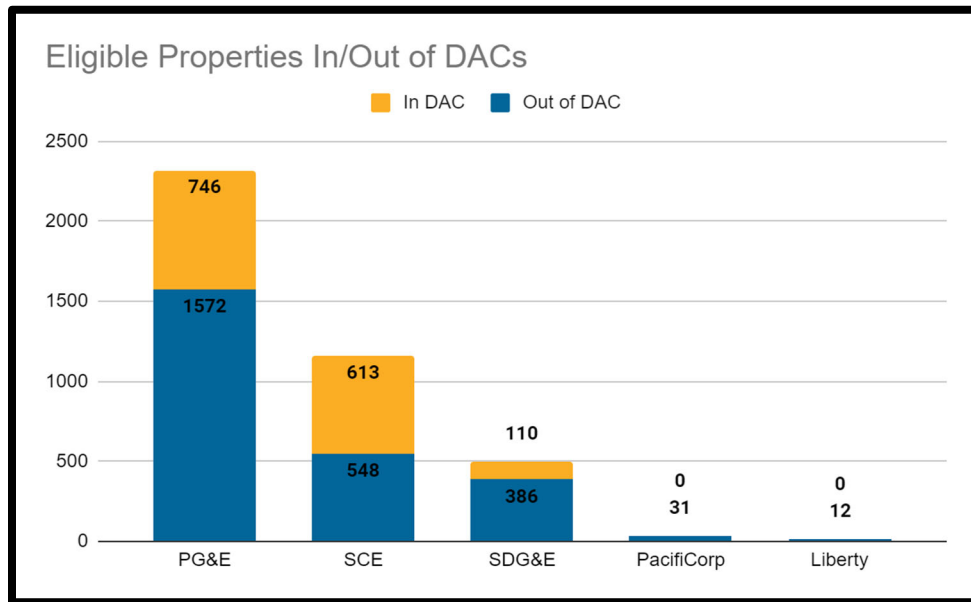
In 2022, the California Environmental Protection Agency (CalEPA) expanded its formal designation of DACs to include lands under control of federally recognized Native American tribes. As a result of the updated DAC designation, properties that are located on land under control of federally recognized tribes can now more easily apply for SOMAH incentives which can impact up to **109** federally recognized Tribes in California. Moving forward, the SOMAH PA will continue to gather data on tribal multifamily affordable housing stock throughout the state to inform direct outreach strategies around engaging tribal entities.

Analysis of Active SOMAH Applications

As of January 3, 2023, there are **432 active SOMAH applications**. Among the active SOMAH applications, approximately **32% (138)** are attributed to properties located in DACs, which is just below the **36.8%** 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



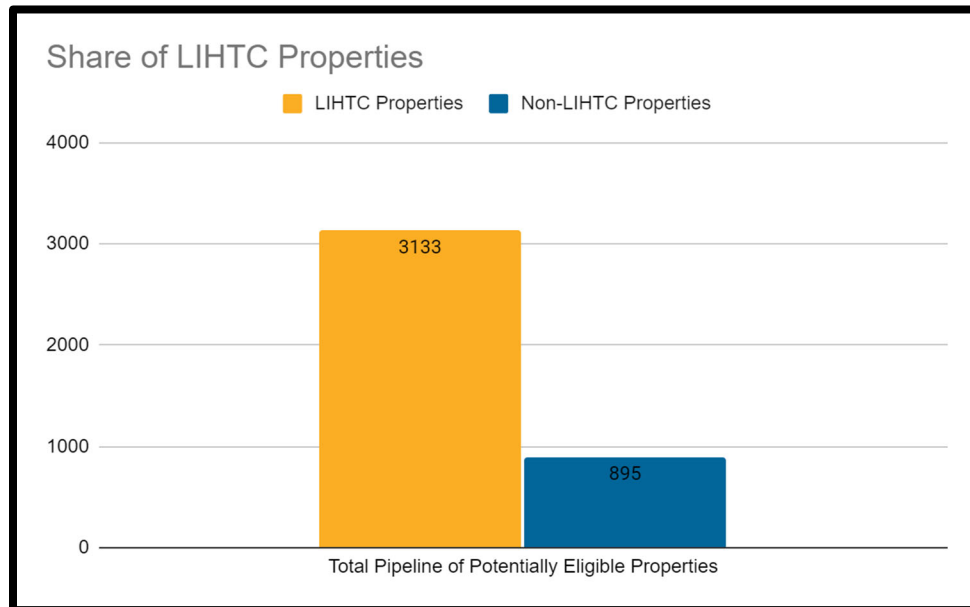


Building a Long-Term SOMAH Pipeline

The Low-Income Housing Tax Credit (LIHTC) is one of the state's largest funding sources for affordable housing development. Approximately **78% (3,133)** 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 2022 market research included five-year projections for both new construction and acquisition rehabilitation LIHTC projects (see Figure 3).

Beyond LIHTC, it is important to note that the future pipeline of SOMAH projects may be impacted by the 2022 Building Energy Efficiency Standards set forth by the California Energy Commission (CEC). Starting in January 2023, newly permitted multifamily residential buildings will be required to install solar PV onsite and buildings with three stories or more will be required to install battery storage.

Figure 3: 5-Year LIHTC Graph



The SOMAH PA will continue to develop relationships with state, federal and local affordable housing financing agencies as a tactic to stay up to date on the development of new affordable housing programs that might be eligible to enroll in SOMAH. Examples of new programs include the California Department of Housing and Community Development (HCD) Homekey Program, which offers funds to convert former hotels and motels into long-term temporary and permanent supportive housing. The Homekey Program has currently [awarded funding](#) for 108 affordable housing projects, including two tribal projects. Additional programs of interest include the [Affordable Housing and Sustainable Communities \(AHSC\) Program](#), the Tribal Housing Grant Program (in development) and the [Transformative Climate Communities Program](#). In addition, the SOMAH PA will continue to work with HCD, as they are prioritizing tribal inclusion in their programs, to develop an informal referral system for tribal housing projects in development to learn more about SOMAH's offerings.



The SOMAH Program will use the 2023 market research to continue improving marketing and outreach efforts to underserved and priority communities, including those in DACs, tribal housing and public housing authorities. To better understand the remaining gaps in the SOMAH Program pipeline, the 2024 Market Analysis will aim to include:

- Further research and analysis of funding programs that serve underserved communities including the Indian Housing Block Grant, Homekey and others.
- 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.
- Research and analysis on the profiles of available housing stock for non-SOMAH participating affordable housing properties in California.

2023 Overarching Priorities, Marketing Strategy, Goals & Objectives

The SOMAH Program's priorities, goals and objectives focus ME&O tactics on outreach to increase SOMAH applications that 1) ensure the state's most under-resourced communities are meaningfully engaged and able to access SOMAH's benefits, 2) center on equity and community benefits and 3) prioritize strategic partnerships with groups already working with SOMAH's intended audiences. The SOMAH PA's 2023 ME&O plan will continue to focus on building the program's pipeline of property owners and contractors to increase SOMAH applications through its Technical Assistance services, ongoing audience and program specific webinars and development and dissemination of communication materials tailored for various audiences.

SOMAH's 2023 and Long-Term Overarching Priorities

- *Prioritizing DACs and Ensuring Community Benefits*

Low-income affordable housing residents, especially working-class 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. 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. The California Environmental Protection Agency (CalEPA) has now designated tribal housing as a DAC which expanded SOMAH eligibility to include properties on lands under control of federally recognized Native American tribes ⁷

- *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 continues to prioritize activities that will ensure equitable outcomes across program objectives and that achieve a greater diversity of projects — addressing geographic gaps, greater diversity of property size and types (farm worker, tribal, senior, housing serving individuals with disabilities and transitional-aged youth).

⁷ [Final Designation of Disadvantaged Communities Pursuant to SB535, 2022 \(ca.gov\)](#)



- *Recruitment and Retention of Property Owners and Contractors*

SOMAH's no-cost [Technical Assistance \(TA\) and Support Services](#) are key to increasing participant diversity, ensuring equitable access to the program, and retaining participants. These services provide start-to-finish support for property owners and contractors, and help tenants and job seekers access and use program benefits. The SOMAH PA will incorporate a variety of ME&O tactics to offer and promote these services to SOMAH audiences, including developing and disseminating success stories and case studies (see 2023 Goals 1-5 activities section for more details).

- *Creating Accessible Programming*

The SOMAH PA continues to be thoughtful in balancing remote versus in-person engagement, considering: accessibility, audience feedback, cost-effectiveness, "return on investment", and health and safety. The SOMAH PA plans to employ a mixture of ME&O activities online, remote and in-person, always prioritizing the health and safety of the SOMAH PA and community members.

- *Strategic Partnerships and Collaborations*

SOMAH is a large, multifaceted program that requires educating and engaging different audiences to achieve diverse participation. To do this successfully, the SOMAH PA relies on partnerships with CBOs, JTOs, as well as co-marketing collaborations with IOUs, affordable housing associations and local/regional/state government entities. The goals of these efforts are to expand the SOMAH reach and build credibility and accountability to the communities SOMAH serves. Figures 3 and 4 below show the variation between where potentially eligible SOMAH properties lie within CBO organizing areas in comparison to the active applications of the current pipeline.

Figure 3: Overlay of CBO Organizing Areas and Reach, JTO Locations and SOMAH-Eligible Properties & IOU Territories

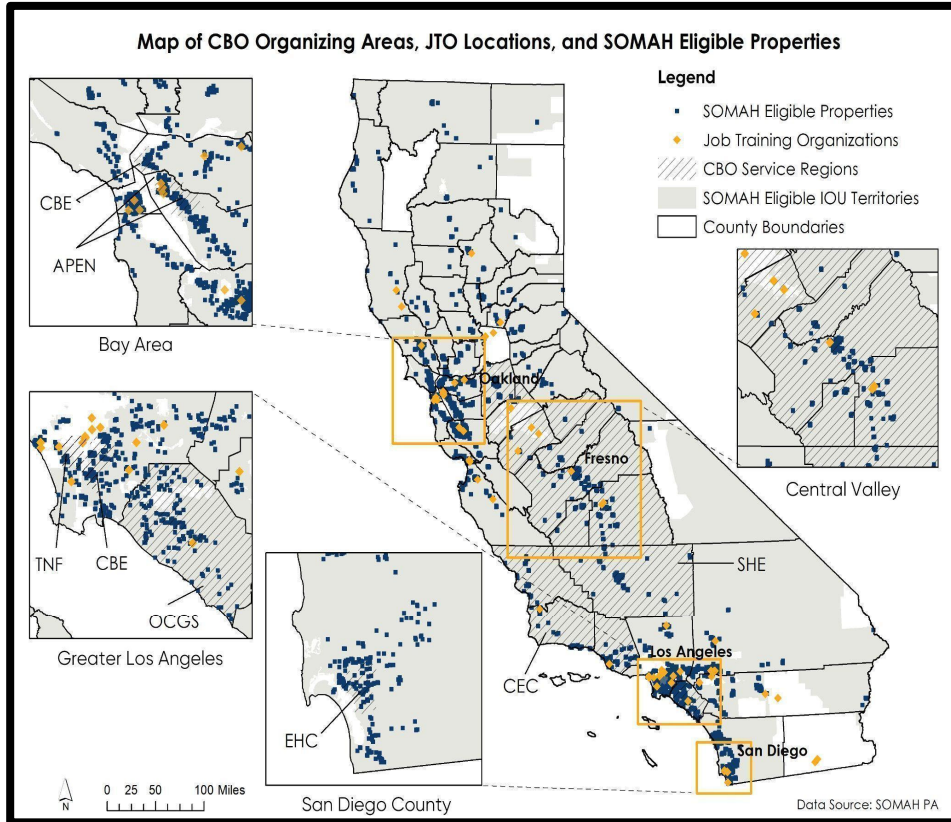
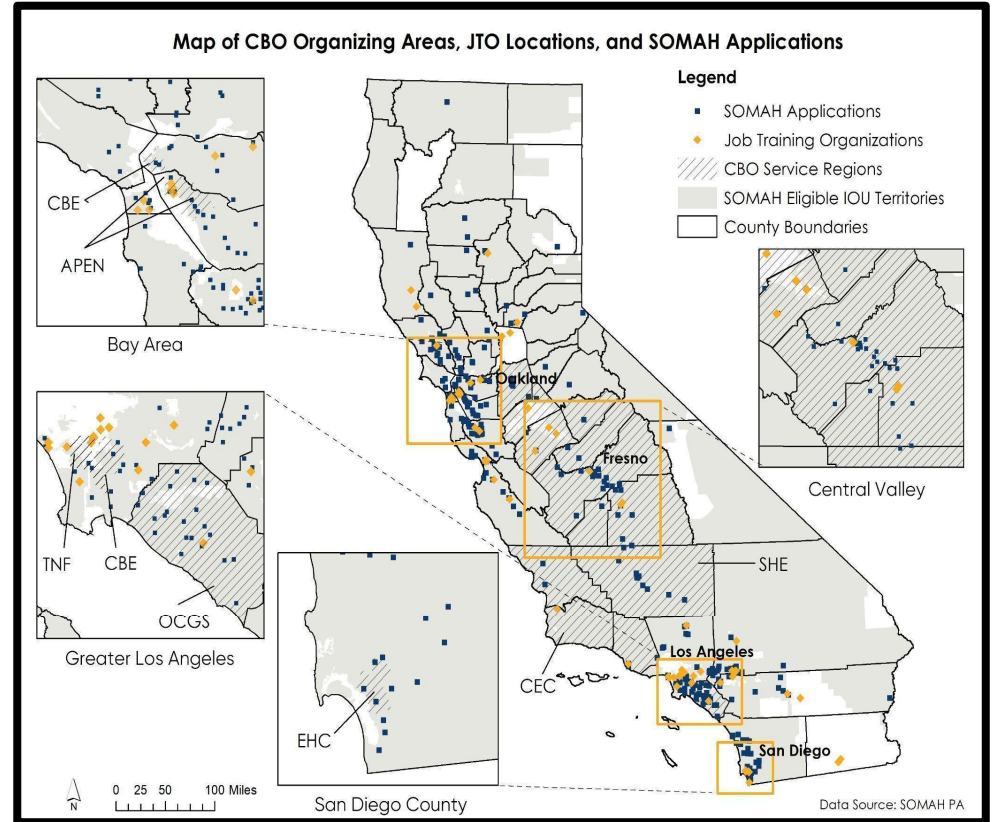


Figure 4: Overlay of CBO Organizing Areas and Reach, JTO Locations, SOMAH Applications and SOMAH-Eligible IOU Territories



SOMAH's 2023 Marketing Strategy

The SOMAH PA continues to engage its many ME&O audiences through a multifaceted marketing strategy employing direct outreach, websites, lead generation, paid and organic media, earned media, owned media and shared media. This marketing strategy considers factors such as audience (including segmented audiences within larger audience categories), location (i.e., tribal communities and DACs), language, accessibility and specific campaign goals (i.e., increasing general awareness, driving attendance to specific events, websites and/or increasing participation in specific program areas).

- *Direct Outreach*

This outreach includes 1-1 consultation calls, phone banking, direct emails and other activities directly connecting members of the SOMAH PA or CBO partners to owners of potentially eligible properties. It also includes in-person and digital events that create a space for speaking directly with impacted community members, particularly those living or working in DAC areas. These events include: on-site events (i.e., ribbon-cutting ceremonies, tenant education workshops), webinars (i.e., workshops, presentations and audience-specific trainings), and trade and community conferences.

- *CalSOMAH.org website*

The 2022 revamp of the SOMAH website includes several updates that provide a more user-friendly experience for SOMAH's audiences. The PA will continue to make updates to optimize and ensure information and resources continue to be accessible. Key updates that will support audience user journeys include:

- Quick access side overlay feature to Application/PowerClerk platform on the homepage
- IOU logos displayed on the homepage footer to help with program credibility.
- Incentive Calculator tool to help facilitate the application process by allowing property owners to determine approximate incentive amounts that can be received depending on allocation percentages.
- Program Impact page highlighting important program statistics, successes and participant experiences.
- Application Process page with a step-by-step application journey and explanation of each milestone and the documents required.
- Quick access Check Eligibility form to help directly engage property owners, contractors and tenants.

- *Paid Media*

The PA will continue to use paid media for education, awareness and lead generation. Listed below are the categories of paid media and specific tactics.

Ad Type	Tactic
Online/mobile	<ul style="list-style-type: none"> • Google search and display ads. • Trade publication ads, including advertising in popular newsletters. • Exploring new digital advertising tactics including native advertising, geo-fencing and website retargeting.
Social Media	<ul style="list-style-type: none"> • Continue to grow Twitter, LinkedIn and Instagram platform followers. • Explore advertising on platforms like YouTube videos.

- *Organic Social Media*

The PA has a social media presence on LinkedIn, Twitter, Facebook and Instagram that has continued to grow over the course of the program. In 2023, the PA will maintain its social media platforms with latest events and content updates, and strengthen social media partnerships with IOUs, CBOs and other stakeholders. The PA will continue to host live streams and share relevant industry posts to increase engagement.

- *Earned Media*

The PA plans to leverage the media landscape of outlets and beats interested in/following renewable energy, decarbonization, and resilience, to raise program profile among grass tops and grassroots audiences. These tactics and activities include:

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

- *Owned Media*

The PA hopes to create a pipeline of timely, relevant and culturally-connected content to introduce SOMAH, and raise awareness about program benefits to specific audiences. This includes developing audience-specific educational and promotional content (see activities tables for Goals 1-5 in SOMAH's 2023 ME&O Goals section); developing and disseminating testimonials, case studies, and success stories in various



formats that engage multiple audiences; and email marketing campaigns including a nurture campaign for participants already in the system who have not taken action.

- *Email Marketing*

The PA will use the resource library of the new website to develop multiple email marketing nurture campaigns for property owners and contractors.

SOMAH's 2023 ME&O Goals

Along with SOMAH's overarching priorities and marketing strategy, the PA has developed five overarching ME&O goals for 2023:

- **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 of and helping to co-market the program.

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 helping property owners submit applications for viable projects. Activities related to achieving Goal 1 center around reaching property owners and helping to eliminate their barriers to solar PV installation by connecting them to the program's no-cost TA services. The SOMAH Program's ME&O activities also support contractor-led participation by confirming the benefits and requirements information owners receive through contractors and help to establish trust and credibility of the SOMAH program, for property owners. With 69 completed projects in 2022, the SOMAH PA is also able to leverage success stories and case studies to spur further participation in DACs, and in general.

Due to the combination of lasting financial impacts of the COVID-19 pandemic, rising project costs associated with inflation and incentive rate step-downs, SOMAH experienced a decrease in the number of new applications in 2022. Given these barriers, the SOMAH PA has prioritized establishing multiple touch points with property owners to develop relationships and build trust to encourage enrollment in the program. This continued engagement and trust- and relationship-building is a crucial longer-term strategy for retaining participants and increasing application submissions. Additionally, the SOMAH PA is working to address and implement solutions to alleviate "pain points" property owners experience in the participation process, as identified in



the Phase II third-party evaluation, such as streamlining the application process, exploring third-party financing opportunities and adjustments to the incentive rates.

Through co-marketing efforts with government stakeholders and IOUs, the PA has co-hosted a variety of online trainings and in-person panel discussions that have provided the opportunity to tap into co-marketing partners' platforms and audiences that intersect with property owner and developer entities. Paid sponsorship opportunities at conferences have also been crucial in capturing the attention of multifamily affordable housing professionals, and affordable housing association networks.

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 and Key Strategies for Property Owners

- *Increasing program enrollment and simplifying the application process*

Strategies to increase application submissions include 1) conducting eligibility prescreening, 2) creating supplemental documentation to enroll target audiences such as tribal entities and 3) developing marketing resources focused on project case studies. Increasing program applications initially stems from having a robust contact database to utilize for property owner outreach. The SOMAH PA will continue to utilize many methods to build out and update contact information, including conference attendee lists, the RocketReach database and other online databases.

- *Prioritizing outreach to Property Owners with DAC located properties*

In 2023, the SOMAH PA will continue to prioritize DACs in the following ways:

1) marketing programmatic changes that further incentivize DAC project enrollment such as eliminated application deposits with Handbook 5.0, 2) continuing outreach to property owners with properties in DACs by increasing communication touchpoints via direct phone calls and emails and targeted paid media campaigns and 3) attending conferences and events specifically in these regions such as the Central Valley and rural areas. Umbrella companies, also known as property management companies, can have both properties in and outside of DACs. SOMAH will prioritize outreach to properties that have more properties found in DACs.

- *Identifying barriers to participation and increasing program enrollment for tribal entities*

As SOMAH aims to increase accessibility for tribes to participate in the program, it is crucial for the SOMAH PA to continue researching tribal barriers to participation through direct contact with tribal stakeholders to ensure that prospective program changes are effective. In 2023, the SOMAH PA will continue to work with tribal stakeholders including, the SOMAH Advisory Council, the CPUC's Office of the Tribal Advisor, tribal housing programs and tribal working groups. Additionally, the SOMAH PA will compile tailored resources for tribal entities to ensure that prospective applicants have a clear understanding of the program requirements, timeline and project outcomes. Resources include but are not limited to tribal case studies and success stories, tribal-specific webpages on CalSOMAH.org and tribal-specific Technical Assistance and Support Services.

- *Increasing awareness and utilization of SOMAH's Technical Assistance (TA) and Support Services*

In 2023, the SOMAH PA will increase marketing and promotion of the program's TA and Support Services to property owners and contractors by: 1) creating and distributing case studies highlighting examples of how TA and Support Services were used, 2) integrating mention of TA during interest calls with property owners, 3) encouraging property owners to take advantage of high-level solar analysis through TA Preliminary Reports and 4) expanding upon TA and Support Services content on the program's website.

- *Expanding marketing and direct outreach to target property management companies that oversee multiple property owner portfolios*

In addition to targeting property owner organizations, also known as umbrella companies, directly, the PA will also conduct direct outreach efforts to property management companies to increase the number of communication touchpoints. Outreach strategies include 1) employing direct communications such as emails and phone calls, 2) identifying and participating in events tailored for property management organizations, and 3) offering resources including case studies to share with their clients.

Challenges Identified and Lessons Learned in 2022 for Engaging Property Owners

- *Installing solar is becoming more costly due to increased project costs from inflation and supply chain challenges*

Affordable housing often lacks sufficient operating reserves needed to pursue upgrades such as installing onsite solar PV. Property owners rely heavily on program incentives to offset the cost of installing solar PV on their properties. Current program data indicates that on average, only 53%-75% of project costs are offset with the SOMAH incentive. Over time, the percentage of costs offset through SOMAH has decreased due to mandatory incentive step-downs and rising project costs. SOMAH's third-party evaluation suggests that as the program progresses and the "low hanging fruit" is picked, projects may get harder, more remote, smaller, or not part of a larger portfolio of properties and thus lower incentives for these more costly projects may be inadequate to encourage participation.

- *Discomfort with the long-term financial responsibility and liability are deciding factors for program participation for some property owners*

By clarifying and promoting Upfront TA, 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 walk-through video of the application process as well as webinars and website content highlighting an Upfront TA case study.

- *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 in property owners' decision making.

- *Lack of staff available to manage a solar installation and system maintenance*

Many housing 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.

- *A comprehensive list of affordable housing property data that includes information such as umbrella companies and property owner contact information is not available.*

While the SOMAH PA has an extensive database of potentially eligible SOMAH properties, there are issues identifying the entire scope of affordable housing that meets SOMAH eligibility requirements. The property data that the SOMAH PA utilizes contains properties leveraging major affordable housing financing sources such as LIHTC, HUD and USDA funds. The SOMAH PA plans to continue to build upon the list of property owners with their respective potentially eligible properties through activities such as direct outreach, developing relationships with new co-marketing partners, and networking at property owner events.

- *Building credibility with the property owner audience has proven to be difficult*

Property owners greatly value hearing from fellow property owners and learning about their experience with the program. The SOMAH PA is prioritizing the development of success stories from participating property owners to ensure that prospective property owner participants have access to tangible data on project costs and cost savings. Property owner success story resources include video testimonials, project case study fact sheets and property owner interviews that will be shared through social media, the program website, email campaigns and targeted direct outreach.

SMARTIE Objectives (all to be achieved by December 2023)

1. Conduct direct outreach to 200 affordable housing organizations, including at least 30 public housing authorities. Outreach will prioritize owners of 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. Conduct direct outreach to and develop relationships with at least 30 tribal entities including tribal housing authorities.
3. Add at least 40 new (for-profit and nonprofit) property owners to SOMAH email signup, targeting diverse property owner types and portfolios (i.e., organization type, portfolio size, geographic diversity, etc.) from direct outreach, paid media campaigns and affordable housing conferences.
4. Host or co-host at least three webinars for property owners and public housing authorities with a minimum of 10 registrants at each, with a prioritization on attendance for property owners with properties located in DACs.
5. Strengthen relationships with at least eight new and existing property owner co-marketing partners in application gap regions such as the Central Valley, Los Angeles, the Inland Empire, San Diego, rural housing (especially PacifiCorp and Liberty territories), tribal housing entities and farmworker housing.
6. 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.



7. Reach 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.

2023 Audiences and Main KPIs

Audiences	Main KPIs
<ul style="list-style-type: none">● Nonprofit affordable housing owners, such as:<ul style="list-style-type: none">○ Faith-based housing○ Rural housing○ Farmworker housing○ Permanent supportive housing (PSH)● For-profit affordable housing owner, such as:<ul style="list-style-type: none">○ Rural housing○ Farmworker housing● Tribal housing entities● Public housing authorities (PHAs)● Property owners not subscribed to the SOMAH email list● Property owners subscribed to the SOMAH email list● Affordable housing associations● State and federal housing finance agencies	<ul style="list-style-type: none">● Number of new applications● Number of new DAC (including Tribal) applications● Number of new email subscribers● Number of new interest calls● Number of webinars and attendees● Number of unique organizations contacted● Number of diverse property owner types contacted (housing authorities, tribal housing entities, etc.)● Number of website visits from paid media campaigns● % of projects requesting or utilizing SOMAH Technical Assistance and Support Services

2023 Activities

No.	Activity	Channels/Tools	Audience	Duration
1.1	Identify and conduct outreach to diverse property owner organizations and property management companies.	<ul style="list-style-type: none"> • Salesforce • Direct outreach <ul style="list-style-type: none"> ◦ Conferences ◦ CBO toolkits ◦ LIHTC application data 	<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 the SOMAH audience by adding new property owners to SOMAH email lists.	<ul style="list-style-type: none"> • CalSOMAH.org • Email (Marketo) • Paid media campaigns • Conference attendee lists • RocketReach database • LIHTC application data • Salesforce 	<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 to illustrate the benefits of SOMAH.	<ul style="list-style-type: none"> • CalSOMAH.org • Email (Marketo) • Targeted advertisements and media • Case Studies 	<ul style="list-style-type: none"> • Property owners • Management companies • Affordable housing associations 	<ul style="list-style-type: none"> • Q1-Q4 • Ongoing and for use at Q3 PO Conferences
1.4	Identify and coordinate with new and existing co-marketing partners to market the SOMAH	<ul style="list-style-type: none"> • SOMAH CBO Partners • Affordable housing partner 	<ul style="list-style-type: none"> • Property owners not on email list 	<ul style="list-style-type: none"> • Q1-Q4 • Ongoing

	Program to their audiences.	channels <ul style="list-style-type: none"> Co-marketing toolkit CalSOMAH.org Social media Case Studies, etc. from 1.3 	<ul style="list-style-type: none"> Housing authorities not on email list Property management companies Government agencies list 	
1.5	Integrate sponsorship opportunities only when this results in a direct marketing opportunity to have a booth or table 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
1.6	Gather feedback from housing authorities and tribal entities with active affordable housing projects to improve outreach strategies.	<ul style="list-style-type: none"> LIHTC application data Direct outreach <ul style="list-style-type: none"> Calls Interviews Workshops Salesforce 	<ul style="list-style-type: none"> Housing authorities Tribal entities 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
1.7	Launch email nurture program to drive email subscribers to submit applications to SOMAH	<ul style="list-style-type: none"> Email (Marketo) 	<ul style="list-style-type: none"> New and existing property owner email subscribers 	<ul style="list-style-type: none"> Q1 Ongoing
1.8	Targeted marketing efforts informed by a list of cities, ZIP codes in DACs or direct marketing tactics.	<ul style="list-style-type: none"> Paid media Search engine marketing (SEM) 	<ul style="list-style-type: none"> Property owners and managers 	<ul style="list-style-type: none"> Q1-Q2 Quarterly

1.9	Reframe and disseminate TA marketing and educational materials to increase Track A participation.	<ul style="list-style-type: none"> • CalSOMAH.org • Email (Marketo), See activity 1.7 • Conferences • Direct outreach • CBO toolkits 	<ul style="list-style-type: none"> • Property owners and managers 	<ul style="list-style-type: none"> • Q1-Q3 • Ongoing
1.10	Promote services through the dissemination of Solar Preliminary 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 • CBO partner toolkits • Upfront TA and Support Service • Prescreen process 	<ul style="list-style-type: none"> • Property owners and managers 	<ul style="list-style-type: none"> • Q1-Q4 • Ongoing
1.11	Research and promote available solar financing information and resources to interested property owners.	<ul style="list-style-type: none"> • CalSOMAH.org • Email (Marketo), See activity 1.7 • Direct outreach • Webinars (GoToWebinar) 	<ul style="list-style-type: none"> • Property owners and managers 	<ul style="list-style-type: none"> • Q1-Q4 • Ongoing
1.12	Engage property owners and applicants with canceled/withdrawn applications to encourage application re-enrollment or identify other candidates for SOMAH in their portfolio.	<ul style="list-style-type: none"> • PowerClerk • Direct outreach 	<ul style="list-style-type: none"> • Property owners • Solar contractors 	<ul style="list-style-type: none"> • Q1-Q4 • Ongoing

1.13	Identify additional contact database sources containing affordable housing property data and scrub existing property data to better distinguish for-profit and nonprofit properties.	<ul style="list-style-type: none"> • Affordable Housing agency data including but not limited to: <ul style="list-style-type: none"> ◦ HCD ◦ Local city and county records • RocketReach • Affordable housing association contact lists • Salesforce • Direct outreach 	<ul style="list-style-type: none"> • Property owners 	<ul style="list-style-type: none"> • Q1-Q4 • Ongoing
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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 99% of current applications (see [2023 January SAPR](#)). The SOMAH PA recognizes the value of contractors and is committed to continuing to provide them support to successfully navigate the program by ensuring contractors have: self-efficacy in sharing information about SOMAH and its offerings with property owners and trainees; access to tools and resources that help them promote the SOMAH Program to property owners; and access to information about program eligibility, requirements, how to submit applications, and online bidding.

The SOMAH Program has continued to experience a low number of participating contractors versus nonparticipating SOMAH-eligible contractors,⁸ with 14 out of 152 participating. A total of 17 new contractors became SOMAH-eligible in 2022, which the SOMAH PA sees as a success. The PA is looking forward to continuing to increase the number of participating contractors through outreach and CalSOMAH.org website updates in Q4 2022, and Q1 2023, that include more marketing tools for contractors.

To address barriers revealed from two 2021 focus groups (see 2022 January SAPR at [CaliforniaDGStats](#)) of nonparticipating SOMAH-eligible contractors, the SOMAH PA implemented a strategy of pairing subcontractors to primary contractors, as an approach to increase the number of contractors participating in the program overall.

Subcontractors

SOMAH defines a subcontractor as a solar contractor company that is not the primary contractor (often the applicant), but the company that has been hired by the prime contractor to complete the solar installation for a SOMAH project. The SOMAH PA led interviews with 5 out of 14 participating subcontractors to understand: their experience as a SOMAH subcontractor; how SOMAH could increase subcontractor participation; and what they would need in order to become primary contractors if desired. The key challenges to becoming a prime were identified as: 1) Bandwidth to handle and manage the program application 2) Ability to engineer the system and create and submit the interconnection design 3) Lack of an operations team 4) Lack of a sales team. For more interview results, see the [2023 January SAPR](#).

Also, in 2022, there was an increase of power purchase agreement (PPA)⁹ providers that wanted to be paired with contractors and subcontractors who manage the installation of projects. The PA expects this pairing will help with financial burdens and limitations with ownership options that smaller contractors have listed as a barrier to participating in SOMAH. In 2023, SOMAH will aim to

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

⁹ Under a solar PPA, the property owner or the host customer pays per kilowatt-hour of energy produced on a monthly basis to the system owner.



increase contractor participation through partnering with additional PPA providers and marketing these providers to all eligible SOMAH contractors.

Potential Ineligible Contractors¹⁰

To simplify the eligibility process, in 2022, the SOMAH PA added time in contractor eligibility trainings for new contractors to finalize their eligibility. This new tactic increased submissions of the Primary Contact Form by 86%¹¹ and helped eliminate confusion about the process that many contractors experienced. In 2022, the SOMAH PA also focused on engaging potentially eligible contractors in areas where geographic gaps of participating contractors exist. This outreach was primarily conducted through: phone calls (calls to all eligible contractors in the Central Valley, and the service territories of Liberty Utilities and PacifiCorp); email announcements by partner organizations (California Solar & Storage Association and the Bay Area Regional Energy Network); a paid social media campaign (September's eligibility training had the highest registrations from paid media campaign and the RE+ conference outreach); and exhibition at the RE+Conference; and advertisements directed towards diverse contractor associations (though this effort was not as successful as associations did not reply to direct emails or phone calls).

Priorities and Key Strategies for Contractor Marketing & Outreach

- *Prioritizing outreach to contractors headquartered in DAC areas and application gap regions:* The majority of SOMAH applications have been contractor-led (Track B) applications (see [2023 January SAPR](#)). By focusing on contractor outreach in DACs and where there are not any eligible contractors, the SOMAH PA expects an increase in applications.
- *Increasing application submissions for current nonparticipating contractors:* The number of participating contractors and subcontractors versus nonparticipating contractors is low — 26 (14 subcontractors and 12 prime contractors) out of 152 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.
- *Connect prime contractors with subcontractors*
As mentioned, the SOMAH PA will continue to implement the approach suggested by SOMAH's third party evaluators to pair subcontractors with prime contractors, as a way of increasing overall contractor participation.

¹⁰ Potential ineligible 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.

¹¹ Previously, Primary Contact Form completion rates averaged 50%.

Challenges Identified and Lessons Learned in 2022 for Engaging Contractors

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

The SOMAH PA has struggled to find appropriate third-party marketing opportunities for reaching diverse contractor organizations since starting efforts in 2021. The PA attempted to advertise and outreach with diverse solar contractor associations across the state and found that associations were either nonresponsive or did not want to pursue marketing efforts with the program.

- *Continued confusion among contractors about program requirements*

SOMAH continues to streamline information and update program materials to make program requirements easier to understand, as feedback is collected from contractors. Contractor eligibility trainings have been redesigned with clarifying language, to increase application submissions. However, the low number of new contractors submitting applications continues to reflect challenges for nonparticipating contractors. The launch of SOMAH's re-designed CalSOMAH.org website also streamlined the application process, clarified information about SOMAH's program requirements, and added resources and tools for contractors. Results of redesign success will be reported in the 2024 ME&O Plan.

SMARTIE Objectives (all to be achieved by December 2023)

1. Continue outreach (direct emails and calls) to all (~29) potentially eligible contractors across geographic gap regions, regions with limited SOMAH-eligible contractors and where there are eligible properties (Liberty Utilities, PacifiCorp, Central Valley, tribal lands).
2. Enroll at least one contractor as an eligible contractor per each area identified in Objective 1.
3. Re-engage contractors through two to four refresher trainings including office hours, personalized branded materials and a contractor nurture campaign.
4. Increase application submissions by at least four nonparticipating contractors.
5. Hold four Contractor Eligibility Trainings.
6. Match subcontractors to 100% of the applications that would like a third-party contractor to assist with PV installation, subject to need.



2023 Audiences and Main KPIs

Audiences

- Diverse contractors (women, minority and/or LGBTQ+-owned businesses)
- Contractors with applications
- Potential ineligible contractors
- Smaller contractors (25 employees or less)
- Nonparticipating contractors
- Subcontractors

Main KPIs

- 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 2022
- Number of applications from diverse or small contractors that had no previous applications through 2022
- Number of contractor webinar registrants
- Number of direct emails opened or completed calls to eligible nonparticipating contractors in gap regions

2023 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"> Q1
2.3	Update Eligibility Training when needed.	<ul style="list-style-type: none"> Eligibility Training 	<ul style="list-style-type: none"> Potential contractors Nonparticipating contractors Subcontractors 	<ul style="list-style-type: none"> Quarterly With program updates and evaluation recommendations
2.4	Pair contractors with applications with subcontractors for installation and/or finance opportunities.	<ul style="list-style-type: none"> Direct emails Direct calls Marketo 	<ul style="list-style-type: none"> Eligible nonparticipating subcontractors Subcontractors Contractors with applications 	<ul style="list-style-type: none"> Q1-Q4 As needed
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 After Eligibility Training
2.6	Improve marketing materials	<ul style="list-style-type: none"> Marketing 	<ul style="list-style-type: none"> Contractors (All) 	<ul style="list-style-type: none"> Q1-Q4

	for contractors to use when engaging property owners.	toolkit <ul style="list-style-type: none"> CalSOMAH.org 		<ul style="list-style-type: none"> With program updates and evaluation recommendations
2.7	Hold office hour webinars with a special topic based on frequently asked questions and important program updates.	<ul style="list-style-type: none"> Webinars 	<ul style="list-style-type: none"> Eligible Nonparticipating contractors 	<ul style="list-style-type: none"> Q1-Q3 Quarterly
2.8	Promote SOMAH through external SOMAH channels.	<ul style="list-style-type: none"> SOMAH social media channels Google ads 	<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), see activity 2.2 	<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, as-requested
2.11	Retrain CBOs on promoting SOMAH to contractors to increase diversity metrics.	<ul style="list-style-type: none"> SOMAH CBO meeting 	<ul style="list-style-type: none"> Contracted SOMAH CBOs 	<ul style="list-style-type: none"> Q1 for all Ongoing for new CBO team

				members
2.12	Promote TA and Support Services.	<ul style="list-style-type: none"> • Eligibility Training • 1-on-1 consultations • Standard TA Requests 	<ul style="list-style-type: none"> • Contractors • Applicants 	<ul style="list-style-type: none"> • Quarterly during trainings • Upon request



Goal 3: Ensure sufficient job trainee participation and preparation for SOMAH job training opportunities and careers in renewable energy.

Overview

The SOMAH PA continues to build the pipeline of eligible job trainees, with prospective paid job training opportunities created by SOMAH project applications received from program launch in July 2019 through 2022. Outreach efforts have focused on the following:

- 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.
- Encouraging 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.
- Educating job seekers and job trainees on career development resources and solar career opportunities.
- Supporting contractor's fulfillment of SOMAH's job training requirements by connecting them with job seekers and local JTOs, thus helping ensure SOMAH trainees are local and targeted hires.

The SOMAH PA regularly conducts outreach and engagement with prospective job trainees, job training organizations, contractors, tenants and CBO partners through meetings, presentations and webinars to ensure goals are met and job training opportunities are successful.

Contractor Job Training Support

The SOMAH PA directly supports contractors with job training requirements by helping them connect with eligible trainees, and providing semiannual Job Training Overview webinars that provide a detailed overview of the job training requirements and helpful resources for facilitating a meaningful job training experience. Additional programming such as workshops/webinars like *Inclusive Hiring Workshop for Solar Employers* educate contractors on inclusive hiring best practices and job accessibility. The SOMAH PA continues to survey contractors on their experience hiring and working with SOMAH job trainees. To-date, the PA has received **137** survey responses, reporting that **14** job trainees have been hired by the contractor after working on a SOMAH project.

Job Training Organization Outreach

Job Training Organizations are trusted partners in connecting trainees with SOMAH projects. In 2022 the SOMAH PA focused outreach to JTOs in regions with high SOMAH project volume, regions with limited JTO partners (such as Northern California, the Central Valley and San Diego) and tribal communities. The SOMAH PA will continue to monitor locations of upcoming SOMAH



projects and job trainees' needs and proactively engage JTOs in these areas. In addition to regional focus on JTOs, the SOMAH PA will continue to target outreach to electrical training programs to expand the diversity of connected training programs. SOMAH's CBO partners and SOMAH's JTO Task Force also help support JTO outreach. CBO's inform their local communities about SOMAH's job training opportunities and facilitate local JTO connections, and the JTO Task Force advises the SOMAH PA on strategies to connect with JTOs, support job trainees in accessing solar careers and link with solar employers. The SOMAH PA is also increasing tenant participation in the job training opportunities through tenant education services.

Job Trainee Support

As part of ongoing efforts to engage SOMAH job trainees and support their career development, the SOMAH PA launched a Job Training Newsletter in 2022 that is sent to job trainees on the SOMAH Job Training Portal, and contacts at JTOs and CBOs. The SOMAH PA also helps support job trainees through webinars and workshops geared at professional development such as *Solar Career Pathways Webinar*, and a *Salary Negotiation Webinar*. The updated CalSOMAH.org website has a solar career resources page for job seekers. The SOMAH PA will continue to build out solar career resources in 2023 by launching a free, online repository of solar training classes - a curated list of HeatSpring courses, and a free resume builder. The SOMAH PA will also continue to encourage job trainees to update and upload their resume into the resume bank on the SOMAH Job Training Portal to increase their exposure to SOMAH contractors and employers.

In addition to supporting job trainees with solar career development resources, the SOMAH PA will be launching job trainee surveys in 2023 to gather feedback on the job trainee experience, job placement and retention.

Priorities and Key Strategies for Job Trainees, JTOs and Contractors

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

In 2023, the SOMAH PA will launch a Contractor Workforce Needs Assessment to survey contractors on hiring needs and their trainee experiences. The SOMAH PA will also convene roundtable discussions with contractors to gain more qualitative feedback on the experience of hiring job trainees. With this information, the SOMAH PA can adapt SOMAH's job training opportunities and partnerships to better prepare job trainees for relevant solar careers. The SOMAH PA will continue to engage the Job Training Organization Task Force in conversations about solar industry workforce needs and training opportunities.

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

The SOMAH PA will 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.¹² The SOMAH PA will continue its

¹² 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 4.0](#)), affordable housing

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.

- *Celebrate job training success stories through interviews and case studies*

With more SOMAH projects reaching completion in 2022 and 2023, the SOMAH PA has already begun to interview job trainees, JTOs and contractors about how SOMAH's job training opportunities have benefited them and published success stories on the SOMAH website. The SOMAH PA will collect more interviews and stories in 2023 to share them with prospective job trainees and JTOs as a way to encourage participation in the SOMAH Program.

- *Engage and prepare tenants for SOMAH job training opportunities and solar careers*

The SOMAH PA will focus more effort on connecting tenants to local JTOs and to SOMAH contractors through increased tenant education services and increased coordination between contractors and property owners for on-site job trainee recruitment.

Challenges Identified and Lessons Learned in 2022 for Engaging Job Trainees, JTOs and Contractors

- *Difficulty recruiting eligible job trainees in certain regions of the state*

In 2022, there were a few instances where recruiting eligible job trainees for projects where regional gaps exist (Northern California, the Central Valley, and San Diego) was difficult and time-consuming for both the SOMAH PA and the contractor. Due to increased capacity on the SOMAH PA for JTO outreach and thanks to feedback from the JTO Task Force, staff has been able to engage new JTOs to fill the existing gaps and is in the process of building relationships with them.

- *Lack of contractor awareness of job training support services*

In 2022, several contractors reported that they were unaware that the SOMAH PA had resources and capacity to support them directly with job trainee recruitment and placement. The SOMAH PA will be reaching out to all active SOMAH contractors to proactively engage and support them with SOMAH's job training requirements. Additionally, the SOMAH PA is working to align and market all supportive services, including job training support for contractors, as Technical Assistance and Supportive Services, with a new one-stop form coming for participants to seek support with various parts of the program.

- *More frequent engagement with job trainees is needed*

The SOMAH PA has received valuable feedback from the JTO Task Force and other JTO partners that more sustained engagement and communication is needed to help job trainees navigate the program from the Job Training Portal to placement. To support this

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 PA has started sending welcome emails to trainees, when they sign up on the Job Training Portal, and sends a Job Training Newsletter. The SOMAH PA will continue to develop more communication touch points and resources for job trainees in 2023 including tutorials on how to navigate the Job Training Portal and solar career pathway guidance.

SMARTIE Objectives (all to be achieved by December 2023)

1. Engage and confirm the eligibility of at least one JTO in the same county as all active or waitlisted SOMAH project with special emphasis on JTOs serving DACs and tribal communities.
2. Educate SOMAH contractors on job training requirements, jobsite safety and relevant labor policies and best practices by hosting at least two contractor-focused job training webinars in 2023.¹³
3. Educate and engage job seekers and job trainees on solar career pathways and high-value soft skills in preparation for solar careers by hosting two job trainee-focused webinars in 2023.
4. Identify contractor hiring and workforce needs and challenges by issuing a workforce needs assessment survey with at least 50% response rate.
5. Increase page visits to the Job Training Portal by 15% from 2022 to 2023 by increasing awareness of the Solar Career Resources page and adding free solar training courses on the Job Training Portal.
6. Ensure that at least 30% of job trainees in the Job Training Portal have resumes on file.
7. Ensure that at least 90% of hired SOMAH job trainees are local or targeted hires (defined by the Local and Targeted Hiring Guidelines) by doing targeted outreach to JTOs local to SOMAH projects and JTOs that serve targeted populations.
8. Do targeted outreach to JTOs that serve DACs to reach a goal of 51% of job trainees living in DACs.

¹³ Note: The SOMAH PA does not manage construction sites, which are the responsibility of contractors, and sharing safety information is to encourage compliance with laws, regulations, and best practices, given the program's job training requirements and the presence of less experienced solar workers on job sites.



2023 Audiences and Main KPIs

Audiences	Main KPIs
<ul style="list-style-type: none">● Prospective job trainees, specifically:<ul style="list-style-type: none">○ Tenants of SOMAH properties○ Local job trainees who reside in the same county as active SOMAH projects○ Targeted hires (those that have experienced barriers to employment)○ Tribal communities● Eligible job training organizations● Communities reached by CBO partners● Contractors facilitating the job training requirements	<ul style="list-style-type: none">● Number of SOMAH-eligible JTOs on the JTO Directory<ul style="list-style-type: none">○ Number of SOMAH-eligible JTOs with California-approved electrical training programs○ Number of SOMAH-eligible JTOs that serve tribal communities● Percent of SOMAH projects with at least one local JTO within a 50-mile driving radius● Number of job trainees signed up for the SOMAH Job Training Portal<ul style="list-style-type: none">○ Percent (%) of job trainees on the SOMAH Job Training Portal that have a resume uploaded on the resume bank● Number of page visits to the SOMAH Job Training Portal● Percent (%) of job trainees with a resume uploaded in the resume bank on the SOMAH Job Training Portal● Number of job trainees hired● Percent (%) of job trainees that are local or targeted hires● Percent (%) of job trainees that reside in DACs

2023 Activities

No.	Activity	Channels/Tools	Audience	Duration
3.1	Conduct targeted outreach to: <ul style="list-style-type: none"> JTOs located in high project volume regions JTOs that serve tribal communities Electrical training programs JTOs that serve DACs 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/meetings Direct emails Job training overview presentations Digital collateral 	<ul style="list-style-type: none"> JTOs 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
3.2	Host at least two webinars for contractors and two webinars for job trainees	<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	Survey SOMAH-eligible contractors to identify hiring and workforce needs and challenges by issuing a workforce needs assessment survey	<ul style="list-style-type: none"> Survey 	<ul style="list-style-type: none"> Contractors 	<ul style="list-style-type: none"> Q2 2023 Q1-Q3
3.4	Survey job trainees that have participated in job training opportunities about their SOMAH training experience and career	<ul style="list-style-type: none"> Survey 	<ul style="list-style-type: none"> Job trainees 	<ul style="list-style-type: none"> Q3 2023 Ongoing

	progression			
3.5	Increase engagement on Job Training Portal and resume bank utilization	<ul style="list-style-type: none"> • Direct emails to job trainees with limited engagement on the Job Training Portal • Job Training Newsletter • Social media 	<ul style="list-style-type: none"> • Job trainees • Contractors 	<ul style="list-style-type: none"> • Q1-Q4 • Quarterly
3.6	Share job training case studies and success stories with relevant SOMAH audiences to encourage job trainee participation and contractor hiring success	<ul style="list-style-type: none"> • CalSOMAH.org • Social media • Job Training Newsletter • Webinars 	<ul style="list-style-type: none"> • Job trainees • JTOs • Contractors • CBOs 	<ul style="list-style-type: none"> • Q1-Q4 • Quarterly



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 properties and tenants living in properties participating in SOMAH are aware of and able to benefit from SOMAH equitably. Tenant education goals are also to ensure tenant safety, reduce tenant confusion and discomfort during installation and help center community voices. To achieve this, the SOMAH PA continues to work closely with the program's eight CBO partners¹⁴, who help support tenant education by conducting community and tenant outreach, supporting tenant education material development, assisting contractors and property owners with tenant education services and engaging local and regional government entities around co-marketing opportunities with the SOMAH PA.

Community-Based Organization Partnerships

The PA's CBO partnerships are key in achieving this goal. In 2022, the SOMAH PA secured partnerships with three additional CBOs in the Central Coast, Los Angeles County and Orange County, to address geographic gaps in outreach. The CBOs supported the SOMAH PA in recruiting across the state for a tenant focus group to better understand the effectiveness of SOMAH's tenant education materials and collaborated with the SOMAH PA to develop and disseminate a video for tenants focused on energy conservation. With the updated CalEnviroScreen 4.0 decision to include tribal communities as DACs, the SOMAH PA is actively working to identify tribal community-based organizations to partner with to build connections with tribal housing authorities, governments and other trusted community members to support the SOMAH PA in increasing tribal participation in the program.

Tenant Education

CBO partners and the SOMAH PA continue to promote tenant education (TE) services — an opportunity for property owners and contractors to receive free direct support to complete their tenant education requirements – through phone calls, direct emails, and webinars. The SOMAH PA expanded its TE services by providing continued tenant education (CTE) to residents at SOMAH completed projects. CTE aims to ensure residents can maximize the benefits of SOMAH by reviewing the required TE materials and supplemental materials that focus on bill interpretation, energy conservation tips and general information about SOMAH. The SOMAH PA coordinates with on-site staff or the host customer to ensure materials provided are accessible to residents based on needs including language, readability and format (PowerPoint, handouts, etc.)

Evaluating the effectiveness of SOMAH's TE materials is a key component of the ME&O work for this goal. In 2022, the PA worked with a third-party evaluator to facilitate 15 one-on-one interviews with residents living in multifamily affordable housing, and administered surveys to

¹⁴ SOMAH CBO partners are: California Environmental Justice Alliance, The Asian Pacific Environmental Network, Communities for a Better Environment, Community Environmental Council, Environmental Health Coalition, OC Goes Solar, Self-Help Enterprises, The Niles Foundation



residents living in properties similar to or eligible for SOMAH. Additionally, pilot paper mailer surveys were sent to one completed project in March 2022, and in November 2022, a full-scale deployment of tenant education surveys were sent to **nine more** completed projects, totaling **695** residential units. This year, the SOMAH PA will continue to evaluate these survey findings, and update the tenant education requirement to incorporate pre- and post-installation TE materials. This approach and these changes are intended to serve all tenants better to ensure they can take full advantage of SOMAH's benefits.

The SOMAH PA remains committed to supporting property owners and contractors in navigating tenant education requirements and supporting tenants in accessing the direct long-term financial benefits of the SOMAH Program.

Priorities and Key Strategies for CBOs and Tenants

- *Increase property owner and/or contractor engagement with tenant education services*

In 2023, the SOMAH PA will continue to promote the program's tenant education services (including expanded continuing tenant education services) through 1:1 calls and other existing outreach methods to property owners and contractors participating in the program. These services ensure property owners and contractors complete the TE requirement for their projects in an equitable manner and that tenants receive comprehensive TE materials. Additionally, the SOMAH PA will make changes to the tenant education requirements based on stakeholder feedback and tenant engagement conducted by the SOMAH PA and CBO partners. The SOMAH PA will focus much of Q1 and Q2 on ensuring program participants are ready for these proposed changes. The SOMAH PA intends to use its TE support services to increase SOMAH's community impact and help generate recruitment material (aimed at applicants) through the development of content that highlights participants' experiences with TE support services. Moving forward, these services are included in and will be marketed as part of SOMAH's Technical Assistance and Supportive Services.

- *Strengthening and revising current tenant education requirements to be more effective*

The current tenant education requirements are designed to be flexible based on the capacity of property owners. This has resulted in an inconsistency in the administering of tenant education across projects, with some properties receiving robust, engaging workshops, while others receive more passive, and ultimately ineffective outreach. The SOMAH PA continues to try to mitigate this issue by proposing updates to current requirements, adapting TA materials and resources, and building capacity to support more projects with tenant education services.

Challenges Identified and Lessons Learned in 2022 for Engaging Tenants

- *Need to increase awareness around tenant job trainee eligibility*

While tenants are eligible to participate on SOMAH projects as job trainees, there continues to be inconsistency with direct outreach that ensures that they are aware of the job training opportunities early enough to apply and participate.

- *Tenants lack knowledge of SOMAH benefits generally*

Through formal and informal surveying, the PA is aware that tenants of SOMAH properties often lack knowledge about the SOMAH program and its benefits. To ensure tenants are aware of SOMAH and its benefits the PA is promoting its tenant education services. As interest and demand for more in-person tenant education services increases, more SOMAH PA and CBO capacity is needed to meet these demands. Consideration should be given to using tenant ambassadors focused on building tenant capacity and understanding SOMAH benefits.

- *Current tenant education requirements are not meeting tenant education needs or goals*

Effective tenant education must be engaging and relevant. The aforementioned assessments of TE materials and surveys of current tenants have indicated that there is inequitable variation in how tenant education requirements are met by program participants and received by tenants. TE materials and distribution methods require updating. Expanded tenant education services and updates to the tenant education requirement via proposed handbook changes will incorporate this lesson to ensure all tenants are served equitably. The SOMAH PA has and will continue to engage applicants about these intended changes.

SMARTIE Objectives (all to be achieved by December 2023)

1. Host one Tenant Education Training Webinar per quarter for property owners, contractors and CBOs.
2. Conduct annual tenant education survey evaluations based on the total populations of tenant units in each IOU region who participated in the SOMAH project and meeting survey criteria with a 95% confidence level and margin of error of 5%.
3. Support all contractors and property owners with any changes to the SOMAH tenant education requirements by conducting TE wellness calls to all participants and including information in all quarterly webinars, listserv announcements, public forums and contractor emails.
4. Expand the SOMAH TE curriculum with four additional modules (resources) for youth, people with disabilities, seniors and tenants with limited access to technology to ensure all tenant populations have an accessible curriculum.
5. In SOMAH participating properties, engage at least 50% of tenants with more than one touch point (newsletters, continued engagement, educational content/workshops, etc.)
6. Create at least one tenant testimonial video from a completed SOMAH project that focuses on the benefits of SOMAH for tenants.
7. 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.



2023 Audiences and Main KPIs

Audiences <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 Local and regional stakeholders 	Main KPIs <ul style="list-style-type: none"> Number of Tenant Education Services Workshops conducted by SOMAH PA team or CBO partners Number of tenants who enroll in energy savings/assistance programs 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 Number of CBOs participating in program Number and percent of tenants that participated in job training opportunities
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2023 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 CBO toolkits 	<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 workshops to support the second TE requirement.	<ul style="list-style-type: none"> Workshops Flyers 	<ul style="list-style-type: none"> Tenants in SOMAH 	<ul style="list-style-type: none"> Q1-Q4 Ongoing

		<ul style="list-style-type: none"> Emails 	properties	
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 CBO toolkits 	<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"> Q4 Annual
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 How Solar Energy Works Installation Timeline 	<ul style="list-style-type: none"> Tenants in SOMAH buildings CBOs 	<ul style="list-style-type: none"> Q1-Q3 Ongoing

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 • CBO toolkits • Case studies • Success stories • Testimonials 	<ul style="list-style-type: none"> • General 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"> • Phone Line 	<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 of and helping to co-market the program

Overview

Connecting with SOMAH -related stakeholders across California is crucial to the success of the SOMAH Program. SOMAH Program stakeholders include investor-owned utilities (IOUs), community choice aggregators (CCAs), regional energy networks (RENs) and government offices at the city, county and state levels as well as elected and appointed officials. These stakeholders can help bring notoriety and name recognition to the SOMAH Program, build trust with target communities, and identify opportunities for SOMAH to layer with and support adjacent clean energy and energy efficiency programs. The stakeholder outreach goal is twofold: to inform stakeholders about the SOMAH program, and to encourage action leading to application submissions as the program progresses toward its overall installation goal of 300 MW of projects.

In 2022, SOMAH surpassed its goal of co-marketing with two energy efficiency programs, coordinated with PG&E and SCE on their Single Point of Contact (SPOC) and Energy Saving Assistance: Common Area Measures (ESA CAM) programs, and co-marketed (via webinars) with SoCalREN, and BayREN's Bay Area Multifamily Building Enhancements Program (BAMBE). The SOMAH PA plans to continue to grow these partnerships through 2023. The SOMAH PA will continue to work with RENs and ESA CAM programs to co-market energy efficiency programs in partnership with SOMAH and to collaborate with IOUs and CCAs to directly target property owners.

This year the SOMAH PA will continue to cultivate these partnerships and look for additional opportunities to co-market the program. Speaking opportunities at conferences will continue to be a key strategy for stakeholder outreach, building on the opportunities that the PA had to speak in 2022 at the San Diego Green Building Council Conference, Central Coast Sustainability Summit, and the California Climate and Energy Collaborative (CCEC) Forum.

Ribbon-cutting ceremonies celebrating completed projects are also a tactic for partnering with and promoting SOMAH to stakeholders – allowing them to showcase their support for SOMAH as they meet constituents. Both SOMAH-led and applicant-led ribbon-cuttings have engaged stakeholders including government officials and IOU staff. In 2023, the SOMAH PA will continue to leverage completed projects to build relationships with relevant stakeholders and encourage them to share these completed projects via their own outreach channels. Throughout 2023, the SOMAH PA will continue outreach to local government offices focused on sustainability, energy and climate action planning in areas in which there are identified eligible properties. Finally, the SOMAH PA will guide the contracted CBOs in their outreach to officials within their communities.

Priorities and Key Strategies for Stakeholders

- *Seek out opportunities to reach a large number of stakeholders at once*

In light of the success of the LERN webinar and other similar presentations in 2022, the SOMAH PA plans to increase program awareness among local governments through guest presentations and co-hosted webinars. Participation in these activities with a wide audience allows the SOMAH PA to develop multiple leads and connections to government entities that can be explored further in one-on-one outreach.

- *Provide stakeholders with additional support for potential action items when conducting outreach*

The SOMAH PA will continue to develop materials to help stakeholder partners promote the SOMAH Program within their communities. For example, the SOMAH PA will provide a list of options to government and legislative offices during initial engagement that can guide their promotion activities. This list will not limit ideas, but will provide clear guidance to help connect direct outreach to direct action.

- *Leverage the success of completed SOMAH projects*

The SOMAH PA will use completed SOMAH projects as talking points to reach out to and connect with elected officials and government offices across the state. The SOMAH PA will continue to prioritize outreach in the Central Valley, PacifiCorp Utility and Liberty Utilities service territories and DACs. The SOMAH PA will leverage the success of completed SOMAH projects by creating case studies and success stories per the SOMAH Phase II third-party evaluation.

Challenges Identified and Lessons Learned in 2022 for Engaging Stakeholders

- *Limited uptake of the SPOC and REN referral forms from the 2022 MEO plan*

Implementation of this form had limited success. There were four referrals made through this form with two referrals through SDG&E ESA CAM. For one of these two referrals the SOMAH PA prepared three Technical Assistance lite reports for potential properties. However, they did not move forward with submitting SOMAH applications. For the second referral the SOMAH PA prepared one TA lite report, but ultimately could not verify SOMAH eligibility. The remaining referrals came from BayREN and 3C-REN. The properties from the BayREN referral could not verify SOMAH eligibility and the lead from 3C-REN is still in progress. In 2023, we will re-engage with these organizations on the referral forms to remind them to use the helpful tool.

- *Engagement with elected officials is challenging to accomplish organically*

Outreach to elected officials was a challenge for 2022. The SOMAH PA struggled to connect with elected officials and meet the objective of direct outreach to five elected officials. The stakeholder outreach team found that it was most effective to speak to larger groups of government officials where possible, such as webinars or conferences, to spread awareness of the program. The most effective outreach to elected officials was through personal connections. The SOMAH PA plans to continue to use these kinds of events to make as many follow-up connections as possible.



- *Outreach does not always lead to action*

While the SOMAH PA pursued many leads throughout 2022 and successfully raised awareness of the SOMAH Program, this awareness did not always result in action or co-marketing opportunities. Going forward, the SOMAH PA team plans to present clear and actionable options to government entities in these initial conversations to help foster follow-up actions.

SMARTIE Objectives (all to be achieved by December 2023)

1. Conduct direct outreach to at least three elected officials to share about a completed SOMAH project in their jurisdiction.
2. Conduct direct outreach to 10 government or legislative offices where there are identified eligible properties to explore and secure co-marketing opportunities.
3. Work with new or existing multifamily energy efficiency program partners to complete four co-branding or co-marketing efforts.
4. Work with investor-owned utilities (IOUs) to co-market SOMAH with tactics including direct outreach to property owners, attending ribbon-cuttings, developing case studies on successful SOMAH projects, at least one in each of the three large IOU territories (SDG&E, SCE and PG&E), etc.
5. Build a relationship with at least one CCA in each utility territory (as applicable) and collaborate on direct outreach to property owners.
6. Work with SOMAH's CBOs to conduct local government outreach to at least three elected officials for promotional opportunities.
7. Work with at least one stakeholder partner in a DAC to release a written or media piece about SOMAH.

2023 Audiences and Main KPIs

<p>Audiences</p> <ul style="list-style-type: none"> • <i>Investor-owned utilities (IOUs)</i> • <i>Community choice aggregators (CCAs)</i> • <i>Regional energy networks (RENs)</i> • <i>Energy efficiency programs</i> • <i>Government and legislative offices</i> <ul style="list-style-type: none"> ◦ <i>City staff</i> ◦ <i>County staff</i> ◦ <i>State staff</i> ◦ <i>Elected and appointed officials</i> • <i>Regional government associations such as San Diego Association of Governments (SANDAG) and Western Riverside Council of Governments (WRCOG)</i> 	<p>Main KPIs</p> <ul style="list-style-type: none"> • Number of new engaged stakeholders contacted/added to Salesforce database • Number of maintained partnerships (i.e., number of meetings with stakeholders with which the SOMAH PA has an existing partnership) • Number of elected officials and other government staff taking action in support of SOMAH (i.e., social media posting, testimonial, letter of support) • Number of co-marketing activities completed with multifamily energy efficiency programs • Number of co-marketing efforts completed with IOUs • Number of presentations given to intended audiences • Percent of co-marketing activities focused in DACs • Number of stakeholder websites promoting SOMAH • Number of SOMAH web references by partners
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2023 Activities

No.	Channels/Tools	Activity	Audience	Duration
5.1	Provide content for and maintain information on the Stackable Programs page of the new SOMAH website.	<ul style="list-style-type: none"> CalSOMAH.org 	<ul style="list-style-type: none"> RENs Energy efficiency programs Government officials 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
5.2	Present at local government events.	<ul style="list-style-type: none"> Virtual conferences, meetings and webinars In-person events 	<ul style="list-style-type: none"> Local governments Regional government associations 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
5.3	Share upcoming speaking events on social media channels.	<ul style="list-style-type: none"> Social media - organic 	<ul style="list-style-type: none"> All stakeholders 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
5.4	Support CBOs in their outreach through updated materials and regular check-ins.	<ul style="list-style-type: none"> Partner toolkit Meetings CBO toolkit 	<ul style="list-style-type: none"> Local governments Elected officials 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
5.5	Provide regionally focused materials and content as requested by stakeholder to promote SOMAH within their communities.	<ul style="list-style-type: none"> Partner toolkit 	<ul style="list-style-type: none"> All stakeholders 	<ul style="list-style-type: none"> Q1-Q4 Ongoing
5.6	Extend invitations to ribbon-cuttings to elected officials and local government staff.	<ul style="list-style-type: none"> Events 	<ul style="list-style-type: none"> Local governments Elected officials 	<ul style="list-style-type: none"> Q1-Q4 Ongoing

Evaluation and 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 and its objectives to assess the SOMAH PA's success more directly in achieving each goal. For 2023, the SOMAH PA will continue to carry out its existing evaluation tactics to track the success and impact of ME&O efforts. The SOMAH PA will evaluate its 2023 ME&O efforts by 1) surveys and focus groups of SOMAH's audiences, 2) quarterly KPI reviews, 3) the Semiannual Progress Report and 4) ensuring key recommendations from SOMAH's Phase II third-party evaluation are being thoughtfully addressed through ME&O efforts. Additionally, the SOMAH PA will continue to gather feedback through other programming efforts such as webinars and 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 also continue to provide guidance and oversight of the program's implementation, which includes ME&O strategies.

Surveys and Focus Groups

The ME&O team will continue to implement surveys and focus groups for property owners, tenants, contractors and job trainees as part of ongoing evaluation efforts to better understand their experiences accessing and participating in SOMAH. Results and findings from surveys and focus groups will continue to help inform updates and modifications to ME&O strategies and tactics, mainly around communication and messaging as well as materials. These surveys and their methodologies account for different outreach needs and approaches to each intended audience. Surveys and focus groups for each major audience occur at different times throughout the year, and key findings from these will be shared via reporting processes like the Semiannual Progress Report.

Quarterly KPIs

Over the course of 2023, 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.

Semiannual Progress Report

SOMAH is required to report on program progress and key metrics semi-annually via the Semiannual Progress Report. This report is comprehensive and 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

SOMAH's Phase II third-party evaluation process was completed in 2022. The SOMAH PA continues to integrate the findings and recommendations of that evaluation into ME&O strategies and tactics. The SOMAH PA also continues to regularly meet with the CPUC to identify opportunities to incorporate key recommendations into the program's ME&O efforts for 2023 and beyond. These opportunities for updates have been implemented throughout this document in the overarching strategies, goals, activities and tactics for 2023 ME&O efforts. These include streamlining and expanding SOMAH's TA services, co-marketing with trusted entities such as IOUs and local/regional government offices and program administrators, continuing to generate case studies and success stories and increasing participation by underserved communities and participant diversity. The SOMAH PA will also be working closely with Verdant during the second triennial evaluation to be concluded in June 2023.

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: 2023 ME&O Plan Budget Forecast¹⁵

Category	Subtask	Total		
		Labor	Non-Labor	Category Total
Marketing and Outreach	ME&O Admin	\$581,072	\$0	\$581,072
Marketing and Outreach	Website Development & Enhancements	\$156,694	\$4,030	\$160,724
Marketing and Outreach	Community Based Organization	\$261,491	\$712,900	\$974,391
Marketing and Outreach	Cooperative Marketing Efforts	\$148,164	\$0	\$148,164
Marketing and Outreach	Conferences	\$45,130	\$17,788	\$62,918
Marketing and Outreach	Tenant Engagement	\$160,193	\$15,400	\$175,593
Marketing and Outreach	Property Owner Engagement	\$237,366	\$10,000	\$247,366
Marketing and Outreach	Contractor Engagement	\$104,161	\$7,000	\$111,161
Marketing and Outreach	Contractor Training	\$37,687	\$0	\$37,687
Marketing and Outreach	Marketing Collateral Development	\$142,610	\$11,819	\$154,429
Marketing and Outreach	Communications	\$86,993	\$0	\$86,993
Marketing and Outreach	Media	\$130,200	\$16,580	\$146,780
Marketing and Outreach	ME&O Plan Development	\$53,515	\$0	\$53,515

¹⁵ In 2022 the MEO Plan's forecasted budget was \$3,088,681



Workforce Development	Cooperative Marketing Efforts	\$64,941	\$0	\$64,941
	Totals	\$2,210,217	\$795,517	\$3,005,734