



Solar on Multifamily
Affordable Housing

SOMAH

Semiannual Progress Report

Reporting Period
January 1, 2024 – June 30, 2024



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1. Executive Summary

The 10th Solar on Multifamily Affordable Housing (SOMAH) Program Semiannual Progress Report (SAPR) covers the first half of 2024 program activities as SOMAH celebrates five years of accomplishments in July. This report highlights a Q2 increase in new projects entering the program, a significant spike in use of the Progress Payment Pathway, steady use of the Affordability Prescreen service, progress on system performance monitoring, and impacts of implementing the additional property eligibility pathways in Q1.

New applications in Q1-Q2 2024 led to 63 new submissions. One was a prescreen conversion to an application submittal and 10 were Track A applications. This reporting period saw the Affordability Prescreen service help 16 projects eliminate extra administrative burden by deeming them ineligible prior to a formal application submission. Additional funding was released for Pacific Gas & Electric Company (PG&E), Southern California Edison Company (SCE) and Liberty Utilities Company, and the program maintained plentiful funding for all investor-owned utility (IOU) territories while providing immediate application review with no waitlists. The expected Q1 2024 spike of completed projects has been shifted to a high project close out volume in the second half of 2024 due to extension requests. Participants continued to report industry impacts that perpetuated delays in construction timelines and project completion, but forecasts look strong for a significant wave of project completions in the second half of 2024, particularly with the amount of mechanical completion confirmed through progress payment activity.

The SOMAH Program Administrator (PA) continues to emphasize understanding and adapting to current environmental and industry challenges while striving to implement a resilient and successful program. Supportive implementation efforts during the first half of 2024 included the full rollout of two additional eligibility pathways of the SOMAH Program Handbook 8. In-person conferences and tenant education workshops have showcased SOMAH-funded systems and emphasized their benefits to tenants and communities. In-person conference attendance in the first half of 2024 included Intersolar and Energy Storage North America, the Housing California 2024 Conference, and the Inland Regional Energy Network (I-REN) executive committee conference.

Community-based organizations (CBOs) continue to be strong partners for the SOMAH Program as they assist in outreach and as an advisory board across multiple audiences and program administration. CBO partners have a mix of responsibilities from property



owner outreach to tenant education workshops to reviewing PA reports, such as the annual marketing, education and outreach (ME&O) plan.

1.1 COVID-19 Acknowledgement

The current project queue has demonstrated participants are committed to participating in SOMAH and are making best efforts to adapt and evolve in the new environment resulting from the pandemic. Despite these impacts, the program has continued to see projects progress with their design, construction and interconnection efforts. The SOMAH PA has maintained a dedicated webpage, CalSOMAH.org/COVID19, to provide up-to-date program information and resources on this topic. The SOMAH PA remains committed to prioritizing health and safety, while working to advance the goals of the SOMAH Program and help build a resilient California.

2. Background

The Solar on Multifamily Affordable Housing (SOMAH) Program provides financial incentives for installing photovoltaic (PV) energy systems on multifamily affordable housing. The program is designed to deliver clean power and credits on energy bills to hundreds of thousands of California's affordable housing residents. The program was created by California Assembly Bill (AB) 693 (Stats. 2015, Ch. 582), authored by State Senator Susan Talamantes Eggman (D-District 05) (then Assemblymember) and signed by Governor Jerry Brown in 2015. Senate Bill (AB) 92 (Stats. 2017, Ch. 26), adopted with the 2017-18 State Budget, further clarified the budget for the program. California Public Utilities Commission (CPUC) Decision (D.)17-12-022 (effective Dec. 14, 2017) implemented AB 693 and changed the name of the program to the Solar on Multifamily Affordable Housing (SOMAH) Program to distinguish it from other state clean energy and low-income solar programs. D.17-12-022 established the program's budget, incentive structure and eligibility policies, among other items. The program has further been modified by the recent SB 355, signed October 7, 2023. SB 355 extends the program to 2032 and includes several modifications to expand program eligibility.

The SOMAH Program serves electric utility and community choice aggregator (CCA) customers in the territories of Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), San Diego Gas & Electric Company (SDG&E), Liberty Utilities Company and PacifiCorp. Funded through greenhouse gas (GHG) allowance auction proceeds, SOMAH has a program budget of up to \$100 million annually for 10



years and an overall target to install at least 300 megawatts (MW) of generating capacity by 2032.

The program is designed to be transparent and accountable to the communities it serves. It is administered by a team of nonprofit organizations that provide a host of no-cost services to maximize participation and community benefit. These services include comprehensive technical assistance and support services for property owners and contractors, tenant education resources and job training opportunities. An advisory council of community advocates provides input into program implementation and helps ensure the program maximizes benefits to the communities it is designed to serve. The SOMAH Program is jointly administered by the Association for Energy Affordability, Center for Sustainable Energy® and GRID Alternatives, in collaboration with the California Housing Partnership and rotating CBOs. The SOMAH Program is overseen by the California Public Utilities Commission (CPUC).

2.1 Application Pathways: Track A and Track B

The SOMAH Program is designed to accommodate participation at varying stages of a solar PV installation, ranging from initial property owner engagement and assessment of a property's solar installation capacity to projects for which the contractor has already been selected or installations that are underway or recently completed. There are two tracks to apply for a SOMAH incentive: Track A and Track B. The SOMAH PA designed the program with two incentive track choices to tailor the user experience based on the stage of a project, whether the program participant is just starting their journey going solar, has a shovel-ready project or has recently completed the installation. Both tracks provide fixed, capacity-based incentives for qualifying solar energy systems, using the Expected Performance Based Buydown (EPBB)¹ methodology. Track A is designed for property owners who receive direct program marketing and outreach from the SOMAH PA and its network of CBO partners, as well as referrals and coordination with other energy efficiency programs. Track A provides technical assistance (TA) and support services for property owners. These services provide a well-rounded understanding of their property's energy needs and access to educational, technical and financial resources that facilitate valuable energy efficiency upgrades and solar installation. Participants who select Track A have their incentive funding

¹ EPBB incentives are based on the system's capacity and design, which provide an estimate of the system's future performance.



earmarked for the duration of the six-month Upfront TA period,² prior to a reservation request. Track A participants typically do not have an identified solar contractor and are guided through a multiple bid process to select an eligible solar contractor for their project. The SOMAH PA has previously noted instances of an owner opting to withdraw from Track A to reapply as Track B after receiving upfront TA support services, ahead of the multiple bid process. In these situations, the SOMAH PA will continue working with owners to tailor their experience to support the successful participation of each project, regardless of application track.

Track B is designed for property owners who receive direct program marketing and outreach from an eligible contractor, project developer or similar entity. Projects in this track have already identified an eligible solar contractor who has performed, or will provide, client assessment and design services, which may include a solar site assessment, initial design, financing options review, contract review, etc. Projects that select Track B are not eligible for upfront TA support services and may waive the requirement to participate in the multiple bid process by submitting the Multiple Bid Waiver with the Reservation Request Package. Track B projects are eligible for the program's suite of Technical Assistance and Support Services that can be requested as needed. These are further described in Section 3.4, Technical Assistance.

For Track A and B projects, incentive funding will be reserved for 18 months based on the date the Reservation Approval Notice is issued. Figure 1 shows the application steps for Track A and Track B.

Figure 1 – Track A and Track B Application Steps



² Handbook 6 increased the time for earmarked funding for Track A projects from three months to 180 days to allow more time to use Upfront Technical Assistance and complete the multiple bid process.



2.2 Eligibility Options: Income-Qualified, Disadvantaged Communities, Tribal Ownership and Public Housing Authority

Regardless of the application track selected, properties qualify for the SOMAH Program in four ways: Income-Qualified, Disadvantaged Communities, Tribal Ownership, and Public Housing Authority.³ A property may be eligible by meeting at least one of the requirements. All properties must also be at least five rental units and meet the definition of deed-restricted, affordable housing in PU Code Section 2852(A)(3)(a)(i). Income-Qualified refers to properties where at least 66% of the units are reserved for households at or below 80% of the area median income (AMI). Disadvantaged communities refer to properties located in a disadvantaged community (DAC) as identified by CalEnviroScreen and the California Environmental Protection Agency (CalEPA). Tribal Ownership refers to properties owned by a California Native American tribe that is on the contact list maintained by the Native American Heritage Commission. Public Housing Authority refers to rental housing properties owned by a public housing authority or public housing agency. See Section 3.1.1, Applications and Incentive Statistics for more information on qualification options for the SOMAH Program.

2.3 Program Budget

SOMAH has a program budget of up to \$100 million annually, with 90% of the funds allocated to incentives and 10% allocated to administration. To ensure transparency for program stakeholders, the SOMAH PA compiles and submits a Semiannual Expense Report (SAER). The SAER tracks expenditures by category, totaling program incentives and administration expenses incurred by the SOMAH PA, CPUC Energy Division (ED) and the IOUs. SAERs are posted twice a year to the California Distributed Generation Statistics [website](#) in conjunction with Semiannual Progress Reports (SAPRs).

³ Effective with Handbook 8 in February 2024, properties can now qualify for SOMAH via four eligibility criteria. Prior to Handbook 8, projects could only qualify for SOMAH through two eligibility options: either low income or being located in a disadvantaged community.



2.3.1 Program Administrative Budget

The administrative budget is shared by the SOMAH PA, CPUC ED and the IOUs. The SOMAH PA tracks the program expenses in four main categories: SOMAH Program Administration; Marketing, Education & Outreach (ME&O); Technical Assistance; and Workforce Development. Figure 2 provides a snapshot from the SAER and outlines total program administrative expenditures through June 30, 2024.

Figure 2 – Total Program Administrative Expenditures by Category

Category	
SOMAH Program Administration	\$22,196,961
SOMAH Marketing, Education & Outreach (ME&O)	\$14,541,653
SOMAH Workforce Development	\$2,488,544
SOMAH Technical Assistance	\$1,856,328
SOMAH Evaluation Expenses ⁴	\$857,721
Investor-Owned Utility (IOU) Expenses	\$5,750,037
Total	\$47,691,245

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

2.3.2 Program Incentive Budget

The SOMAH PA publishes updated program incentive budget information for each IOU territory to the California Distributed Generation Statistics [website](#)⁶ weekly. Because each IOU territory's annual incentive budget varies based on specific GHG allowance auction proceeds, the SOMAH PA maintains five individual application queues and up to five waitlist queues, when applicable. The funds for each utility territory may be released at separate times, with the collections based on each utility's Energy Resource

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

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

⁶ Program incentive budget information for each IOU territory is located here: https://www.californiadgstats.ca.gov/programs/somah_budget/.



Recovery Account (ERRA) or Energy Cost Adjustment Clause (ECAC). PG&E and PacifiCorp funding are released quarterly versus the annual lump sum release for other territories.

The following utility territories released funding during the first half of 2024: PG&E (June 2024), SCE (June 2024) and Liberty Utilities (June 2024). Figure 3 summarizes the committed and remaining budget for the SOMAH Program. Figure 4 summarizes the program dollars collected by fiscal year to date for all five IOUs, including the three June 2024 releases mentioned above, and identifies application totals and available program funds.



Figure 3 – Project Capacity and Budget

		Waitlist		Earmarked		Pending Reservation		Reserved		Completed		Application Totals		Total Budget (\$)	Remaining Budget (\$)
		Capacity	Budget	Capacity	Budget	Capacity	Budget	Capacity	Budget	Capacity	Budget	Capacity	Budget		
		(MW)	(\$)	(MW)	(\$)	(MW)	(\$)	(MW)	(\$)	(MW)	(\$)	(MW)	(\$)		
PG&E	Track A	0	0	0.565	1,807,460	0.064	128,379	0.169	332,553	0	0	0.798	2,268,392	261,818,478	174,966,055
	Track B	0	0	0	0	4.214	8,951,151	30.110	63,057,305	6.302	12,575,575	40.626	84,584,031		
	Total	0	0	0.565	1,807,460	4.278	9,079,530	30.279	63,389,858	6.302	12,575,575	41.424	86,852,423		
SCE	Track A	0	0	0.234	750,385	0	0	0.491	1,165,562	0	0	0.725	1,915,947	337,783,742	280,227,535
	Track B	0	0	0	0	0.241	543,012	15.451	34,192,679	10.823	20,904,569	26.515	55,640,260		
	Total	0	0	0.234	750,385	0.241	543,012	15.942	35,358,241	10.823	20,904,569	27.240	57,556,207		
SDG&E	Track A	0	0	1.177	3,765,090	0	0	0	0	0	0	1.177	3,765,090	80,607,112	55,696,174
	Track B	0	0	0	0	1.133	2,681,150	5.641	12,183,602	3.096	6,281,096	9.870	21,145,848		
	Total	0	0	1.177	3,765,090	1.133	2,681,150	5.641	12,183,602	3.096	6,281,096	11.047	24,910,938		
PacifiCorp	Track A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0	0	8,930,753	8,930,753
	Track B	0	0	0	0	0	0	0	0	0	0	0	0		
	Total	0	0	0	0	0	0	0	0	0	0	0	0		
Liberty Utilities	Track A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0	0	2,452,225	2,165,273
	Track B	0	0	0	0	0	0	0.148	286,952	0	0	0.148	286,952		
	Total	0	0	0	0	0	0	0.148	286,952	0	0	0.148	286,952		
TOTAL	Track A	0	0	1.976	6,322,935	0.064	128,379	0.660	1,498,115	0	0	2.700	7,949,429	691,592,310	521,985,790
	Track B	0	0	0	0	5.588	12,175,313	51.350	109,720,538	20.221	39,761,240	77.159	161,657,091		
	Total	0	0	1.976	6,322,935	5.652	12,303,692	52.010	111,218,653	20.221	39,761,240	79.859	169,606,520		



Figure 4 – Cumulative Program Budget

	2016 Budget (\$)	2017 Budget (\$)	2018 Budget (\$)	2019 Budget (\$)	Under- Collections True-up (\$)	2020 Budget (\$)	2021 Budget (\$)	2022 Budget ⁷ (\$)	2023 Budget (\$)	2024 Budget (\$)	Application Totals (\$)	Total Budget (\$)	Remaining Budget (\$)
PG&E	1,740,992	4,359,110	39,330,000	33,963,300	31,620,584	34,898,605	28,448,281	41,600,106	38,400,027	7,457,473	86,852,423	261,818,478	174,966,055
SCE	2,733,251	4,536,050	41,400,000	30,581,476	45,542,591	20,410,891	57,569,657	66,028,108	43,839,644	25,142,074	57,556,207	337,783,742	280,227,535
SDG&E	0	0	9,270,000	9,104,076	11,343,785	10,294,957	9,831,156	17,308,193	13,454,945	TBD	24,910,938	80,607,112	55,696,174
PacifiCorp	422,443	961,291	1,009,512	1,150,528	0	1,177,394	1,090,332	1,512,862	1,606,391	TBD	0	8,930,753	8,930,753
Liberty Utilities	132,440	258,329	314,706	419,517	0	326,327	300,128	401,608	299,170	TBD	286,952	2,452,225	2,165,273
TOTAL	5,029,126	10,114,780	91,324,218	75,218,897	88,506,960	67,108,174	97,239,554	126,850,877	97,600,177	32,599,547	169,606,520	691,592,310	521,985,790

⁷ D.22-09-009 modified D.17-12-022 for the SOMAH forecast budgeting process. Each IOU can propose to set aside their proportionate share of \$100 million for SOMAH, if they adequately show that the IOUs' collective revenue will exceed \$100 million. The SOMAH PA releases funds based on the IOUs' set-asides, then trues-up the final three months of the year once the IOUs submit their Joint Advice Letter.



3. Program Progress — Key Performance Areas

The overall SOMAH Program budget is allocated between incentive budgets and administrative budgets. The SOMAH PA administrative budget is further tracked through four categories: Program Administration, ME&O, Workforce Development and Technical Assistance. The following sections describe progress to date and notable metrics in each of the four categories.

3.1 Program Administration

The SOMAH Program opened on July 1, 2019, which included opening the online application database (PowerClerk®) for application submissions, launching the online bidding tool and commencing the publication of program statistics through the SOMAH Incentive Budget Report and SOMAH Working Data Set on the California Distributed Generation Statistics [website](#). The first iteration of the Semiannual Expense Report (SAER) was submitted on July 31, 2019, and the initial Semiannual Progress Report (SAPR) on January 31, 2020.

3.1.1 Applications and Incentive Statistics

SOMAH continues to have ample funding available in all five IOU territories, with an available incentive budget of more than \$691 million across the program for this reporting period. No IOU territory has had a waitlist since Q4 2020 (SDG&E). Stakeholders and interested applicants should refer to the [program funding page](#) on CalSOMAH.org for up-to-date information on recently released and available funding per territory and can subscribe to the [SOMAH email list](#) for real-time notifications when additional funding is released.

There are two main ways for previously allocated funds to become available for other projects. First, a project may be cancelled by the SOMAH PA due to missed deadlines or failure to meet program eligibility requirements, or voluntarily withdrawn by the applicant or host customer. Second, incentive funds may become available through the course of application review. For example, an applicant's adjustments to the system size after receiving consumption data from the IOU will affect the reserved incentive amount. The SOMAH PA has observed that nearly all projects will adjust their system size after receiving site consumption data during the Reservation Request Milestone (or during Upfront TA for Track A projects), therefore, modifying the requested incentive with the system size adjustment. With adjustments like this, the previously allocated funds are then returned to the pot of available funding or applied to waitlisted projects (when applicable) through an ongoing reconciliation process by the SOMAH PA. Similarly, the program maintains a small buffer in each territory's budget to



accommodate potential increases in system sizes and incentive amounts resulting from consumption data from the IOU, anticipated future load additions, Solar Sizing Tool recommendations or other reasons.

The lack of a method for applicants to easily retrieve tenant consumption data before submitting a program application has historically resulted in a longer reservation request review timeline. In response to the 2021 Phase II Evaluation Report feedback finding the attainment and timing of consumption data was a barrier, the PA coordinated and implemented application-related program and process improvements throughout 2022–23. The largest push for application streamlining efforts is included in the changes approved in early 2023 through Handbook 6. Historical information on SOMAH's handbook updates is outlined below and in Section 4.2.2, Program Handbook Records.

Figure 5 – Application Status by IOU Territory

Program	Active	Complete/ Incentive Paid	Cancelled/ Withdrawn	Total
PG&E	289	56	196	541
SCE	97	54	96	247
SDG&E	53	22	43	118
Liberty Utilities	2	0	0	2
PacifiCorp	0	0	1	1
Total	441	132	336	909

N = 909

Between January and June 2024, a total of 63 applications were submitted to the SOMAH Program. Application submissions increased toward the second half of the reporting period with the largest spike in April. The increase in new applications was largely attributed to the program's newly expanded eligibility requirements and the PA's increased program engagement and re-engagement efforts. Of the submitted applications from January through June 2024, 10 new applications were submitted in Q1, and 53 were submitted in Q2. Ten of the new applications were Track A projects, all were submitted in the larger IOU territories (PG&E, SCE and SDG&E), and one participated in the Affordability Prescreen service. Track A application submissions have increased slightly since the last reporting period. This increase is mostly attributed to the SOMAH PA's coordination with other energy efficiency program administrators such as our program partner AEA. Our program partners play an integral role in cross-program coordination, ensuring property owners are viewing their projects holistically and are directed to the proper program and technical assistance contacts. No new applications were submitted in Liberty Utilities or PacifiCorp territories this reporting period. The last applications submitted in Liberty Utilities' territory was in 2020 and in



PacifiCorp's territory, the last application was submitted in 2019. The two applications in Liberty Utilities territory have reached their Proof of Project Milestone. The single application in PacifiCorp territory was cancelled, with plans to re-enter the program in the future after resolving extenuating circumstances with site conditions and project planning. The SOMAH PA has been working on marketing and outreach coordination with both Liberty Utilities and PacifiCorp to increase program participation in these small multi-jurisdictional utility territories. Outreach coordination efforts began in the latter half of 2022 and have continued with increased efforts during the first half of 2024. The PA has discussed program barriers and disadvantages in the northern multi-jurisdictional utilities and, to address these issues, the SOMAH PA has developed Technical Assistance Preview Reports for the territories' likely eligible properties, as identified in the SOMAH property eligibility map. The PA used the reports to rank the properties from highest to lowest priority (properties with the least solar feasibility) and will be emailing both program information and the reports directly to property owners by the end of Q3 2024.

The number of new applications submitted in the previous reporting periods are as follows:

- January–June 2024: 63 new applications
- July–December 2023: 81 new applications
- January–June 2023: 46 new applications
- July–December 2022: 35 new applications
- January–June 2022: 14 new applications
- July–December 2021: 127 new applications
- January–June 2021: 43 new applications
- July–December 2020: 63 new applications
- January–June 2020: 120 new applications

Application spikes (greater than 100) occurred before July 2020 and October 2021 incentive step-downs, with applicants seeking the higher incentive rate before incentive levels decreased. Historically, the program was required to step down incentive rates annually on July 1 of each year. In 2021, the July 1 incentive step-down was postponed due to a pending National Renewable Energy Laboratory (NREL) report used for the incentive step-down analysis. The CPUC approved the SOMAH PA's 120-day extension request, which provided the PA time to complete the analysis and stakeholder outreach prior to the Step 3 incentive rate deployed on October 30, 2021. The absence of an application submittal spike in 2022 aligns with the deferred incentive step-down resulting from the PA's Petition for Modification of the incentive structure. The SOMAH PA was granted an extension to pause the incentive step-down until a Decision



on the Petition for Modification was issued by the CPUC.⁸ As a result of the extension for incentive step-down for 2022, the previous pattern of increased application submissions prior to July 1 did not occur in 2022. Per CPUC Decision D.23-03-007, the annual incentive step-down is no longer part of the program. See Section 4.2, Program Design and Updates for more information on these program changes.

Third-party evaluations (2020 Phase I SOMAH Process and Impact Assessment Report, 2021 Phase II Evaluation Report, and 2023 Triennial SOMAH Evaluation Report) highlight the importance of pipeline management, which continues to be a key focal point for the SOMAH PA. Pipeline management efforts aim to increase and maintain program participation with continued new application submissions to meet the program's 300 MW goal. Section 3.2, Marketing, Education and Outreach includes more information about SOMAH's ME&O efforts on pipeline management and increasing program participation and diversity. Due to a decrease in application submissions throughout 2021–22, which stalled overall growth and progression toward meeting program goals, program modifications and increased incentives were implemented to jumpstart program activity in 2023 and promote greater participation. The SOMAH PA is focused on new application submissions and application retention. In particular, the SOMAH PA is emphasizing engagement toward recoverable applications that have previously cancelled. By using additional supportive measures, such as the Affordability Prescreen Service and suite of Technical Assistance and Support Services, quality leads with viable projects are better able to submit program applications in PowerClerk. See Section 3.2.4, Property Owners for more information.

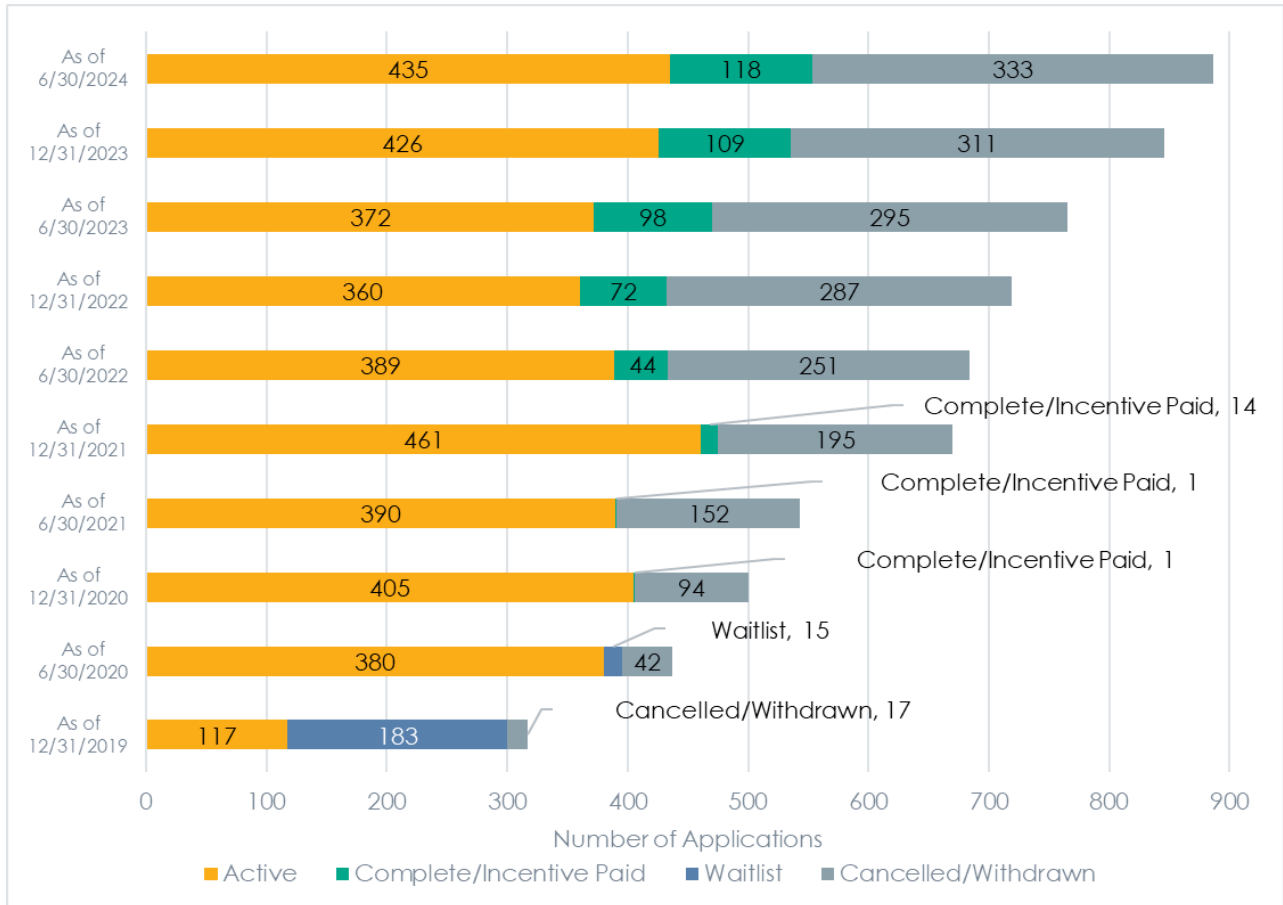
In November 2022, the SOMAH PA formalized the Affordability Prescreen service, which provides potential participants with a high-level review of a property's regulatory documentation prior to submitting a formal application through the application portal, PowerClerk. The opportunity to partially prescreen properties for SOMAH eligibility alleviates a significant administrative burden for both applicants and application assignees and has been a well-utilized resource for participants. Through the process, participants can also establish a dialogue with the SOMAH PA where questions that may arise during initial application review are answered and rapport is built prior to application submission.

⁸ Decision (D.)23-03-007 amended D.17-12-022 incentive levels to raise the highest incentive level possible to \$3.50/watt for tenant areas and \$1.19/watt for common areas and ended the annual incentive step-down.



With more prescreen requests and the SOMAH PA's desire to streamline the application process, the Affordability Prescreen process migrated to PowerClerk in June 2024. Potential applicants can now submit a prescreen request directly through PowerClerk using the VersaForm feature, which does not require a PowerClerk account for submission. This enhancement integrates the popular service into PowerClerk, the same platform for the program applications. An additional goal of this process improvement is to increase familiarity with PowerClerk to further encourage eligible prescreens to convert their potential project into an active SOMAH application. Relevant data will be automatically copied into the new SOMAH application in the appropriate utility territory once the prescreen request is deemed eligible, reducing the data entry required of the applicant.

Figure 6 – Cumulative Applications Received



Since implementing the Affordability Prescreen service toward the end of 2022, 40% of the Affordability Prescreen service entries have become active SOMAH applications. Since implementing the service, only six applications that have participated in the service have cancelled. The cancellations were due to the following reasons: ineligibility



stated in initial prescreen review and application submitted same ineligible documentation, property was master metered, property was sold and no longer pursuing solar installation, and property was not serviced by a participating IOU. Common reasons for ineligibility of documents submitted to the Affordability Prescreen Service have included: 1) deed restrictions being expired or having less than 10 years remaining in their compliance period; 2) lack of information within the document to locate the property; and 3) the candidate was unresponsive to PA requests for additional documentation. AMI restrictions are rarely referenced for ineligibility due to the recent Handbook 8 update expanding affordability requirements⁹ and the option to use an income affidavit confirming the property meets the affordability requirements even if not explicitly stated or confirmed in the regulatory agreement. The Affordability Prescreen service enables applicants to confidently submit applications that fulfill SOMAH eligibility requirements. It also informs eligible prescreened properties of potential additional documentation necessary to submit successful applications, such as the income affidavit or requests for further documentation supporting the original regulatory agreement. Prescreen efforts are being tracked to record project conversion rates into active application submissions and/or prescreened projects where eligibility was confirmed that may need further marketing, education and outreach efforts. The volume of prescreens and throughput to new application submissions is as follows:

- January–June 2024 — 31 prescreens processed
 - 14 eligible, 1 eligible with income affidavit, 16 ineligible
- July–December 2023 — 27 prescreens processed
 - 8 eligible, 4 eligible with income affidavit, 15 ineligible
- January–June 2023 — 49 prescreens processed
 - 18 eligible, 9 eligible with income affidavit, 22 ineligible
- September–December 2022 — 34 prescreens processed
 - 25 eligible, 3 eligible with income affidavit, 6 ineligible

Since the rollout of the formalized prescreen offering, no applications have been cancelled for eligibility issues that could have been identified through the less burdensome Affordability Prescreen service. The Affordability Prescreen service has lessened administrative burdens by identifying 59 ineligible properties that would have

⁹ Effective February 15, 2024, Handbook 8 expands the income-qualifying affordability requirement from 80% of property residents having incomes at or below 60% of the Area Median Income (AMI) to 66% of property residents having incomes at or below 80% of the AMI.



been cancelled due to eligibility issues had they submitted a formal application. This reporting period saw a decrease in the number of prescreens deemed “eligible with income affidavit”. If the decrease in references made to the income affidavit continues, it could be a signal that the AML eligibility updates from Handbook 8 have lessened reliance on an additional document being required for program eligibility.

Applicants and property owners have also shared valuable feedback for projects that have chosen not to or are unable to move forward with the SOMAH Program after initial application submission. The SOMAH PA solicits additional details from all cancelled and withdrawn applications for tracking and reporting efforts. This feedback has helped the SOMAH PA address eligibility challenges and barriers to program participation via program handbook changes (currently on Handbook 8). Additionally, this cancellation feedback has positioned the SOMAH PA to prioritize outreach to potentially “recoverable” cancelled applications to determine if their needs can be addressed to facilitate future participation. This outreach is discussed further in Section 3.2.4, Property Owners. Applicant and SOMAH PA combined efforts resulted in seven previously cancelled applications re-entering the program in the first half of 2024.

The SOMAH PA maintains consistent communication with SOMAH contractors with active applications to understand their project timelines and any potential barriers. This interface with contractors and program participants also helps to support forecasting efforts for program activities as well as tailored project assistance for unique application situations. Over the past year, as application activity picked up for 18-month reservation expiration due dates, a related increase in extension requests to the Incentive Claim Package deadline was also observed. While Q1 2024 extension request activity remained high with 215 extension requests received, the SOMAH PA saw a slowly declining number of requests in Q2 with 107 extension requests received, leveling out toward the end of the quarter. The number of Incentive Claim Package deadline extensions submitted in the previous reporting periods are as follows:

- January–June 2024: 322 new extension requests processed
- July 2023–December 2023: 251 new extension requests processed
- January 2023–June 2023: 243 new extension requests processed
- July 2022–December 2022: 171 new extension requests processed
- January 2022–June 2022: 98 new extension requests processed
- July 2021–December 2021: new 24 extension requests processed

The new extension requests refer to each individual extension request submitted, and applications may have more than one extension request throughout the application process. Each extension request is reviewed and addressed on a case-by-case basis. From program start to date, the average length of an Incentive Claim Package



deadline extension request is 172 days. The maximum term per extension request is 180 days. Similar to previous reporting periods, the majority of extension requests cite one of three reasons: 1) changes to the original design layout or funding of the project; 2) problems in the permitting or interconnection process that caused a delay; or 3) difficulties related to supply chain issues (such as steel for carport installations). Utility-related delays such as long interconnection timelines, difficulty scheduling shutdowns and meter releases, and inspection delays were cited at varying levels of frequency across the SCE, SDG&E and PGE territories, as well as unforeseen engineering challenges. Despite these extensions, the program completed and paid out 18 projects from January through June 2024 with a significant group slated for completion in late 2024.

The SOMAH PA uses application milestone deadlines and construction timelines to assess the progress of the application queue and for broader program planning, such as project completion estimates. In the first application step, the Reservation Request Milestone, the applicant is required to enter the project's projected construction start date or actual construction start date. This information helps identify where the project is in the life cycle of installation at the time of the SOMAH application. While the construction and interconnection processes are bifurcated from the SOMAH incentive application, the timing of installation and interconnection directly relate to the project's ability to submit for the incentive claim and progress payment (optional). After receiving reservation approval, at the start of each milestone, Energy Efficiency Compliance, Proof of Project and Incentive Claim, applicants are prompted to report if construction has started, or update the projected construction start date, if not. As of Q1 2024, applicants are now required to provide the mechanical completion date of a project, which will indicate construction completion. Tracking mechanical completion dates will support the SOMAH PA in understanding the time it takes for a system to receive permission to operation (PTO). Additionally, the Extension Request Form includes mandatory fields for applicants to provide an updated actual or projected construction start date to ensure quality information, the most up-to-date data capture, and further insight to milestone progress. The additional construction start date validation provided via the Extension Request Form improves the accuracy of the data represented in Figure 7. Figure 7 shows the construction timeline information reported in applications through Q2 2024.



Figure 7 – Construction Timeline Insights

Date	Construction Commenced	Projected Construction Start Date
2019	4	0
2020	21	0
2021	96	6
2022	45	9
Q1 2023	12	24
Q2 2023	7	42
Q3 2023	18	41
Q4 2023	1	35
Q1 2024	4	24
Q2 2024	0	52
Q3 2024	1	72
Q4 2024	0	42
TOTAL	209	347

Impacts on construction plans and project timelines remain prevalent across active projects and will likely continue to delay project completion timelines for the remainder of the year. Actual construction start timelines will continue to be updated as data is collected at different milestones in the application process. Since the implementation of the revised Extension Request Form (March 2023), 185 new extension requests have been submitted containing the construction timeline. The additional data collected in the new mandatory fields shows more projects claiming actual construction start dates over projected construction start dates. In the projects that have submitted multiple extension requests, findings show the later extension requests (most recently submitted) are more likely to have already begun construction instead of providing a projected construction start date. The revised Extension Request Form allows the SOMAH PA to gain more visibility regarding construction timelines, project progression and the necessity for extension requests.

As seen in Figure 7, the number of projects reported to have started construction in Q1-Q2 2024 decreased by 79% from the number of projects that started construction in Q3-Q4 2023. Construction timeline projections have continued to shift through 2024 as projects progress and are better able to forecast construction timelines with more certainty. Through feedback provided via extension requests and other direct applicant feedback, the SOMAH PA anticipates a significant number of projects will enter the project completion phase in the second half of 2024. The 2024 emphasis on



closing out existing projects should impact Figure 7 in the next reporting period with many of the projects in the “Construction Commenced” column moving to completed status.

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

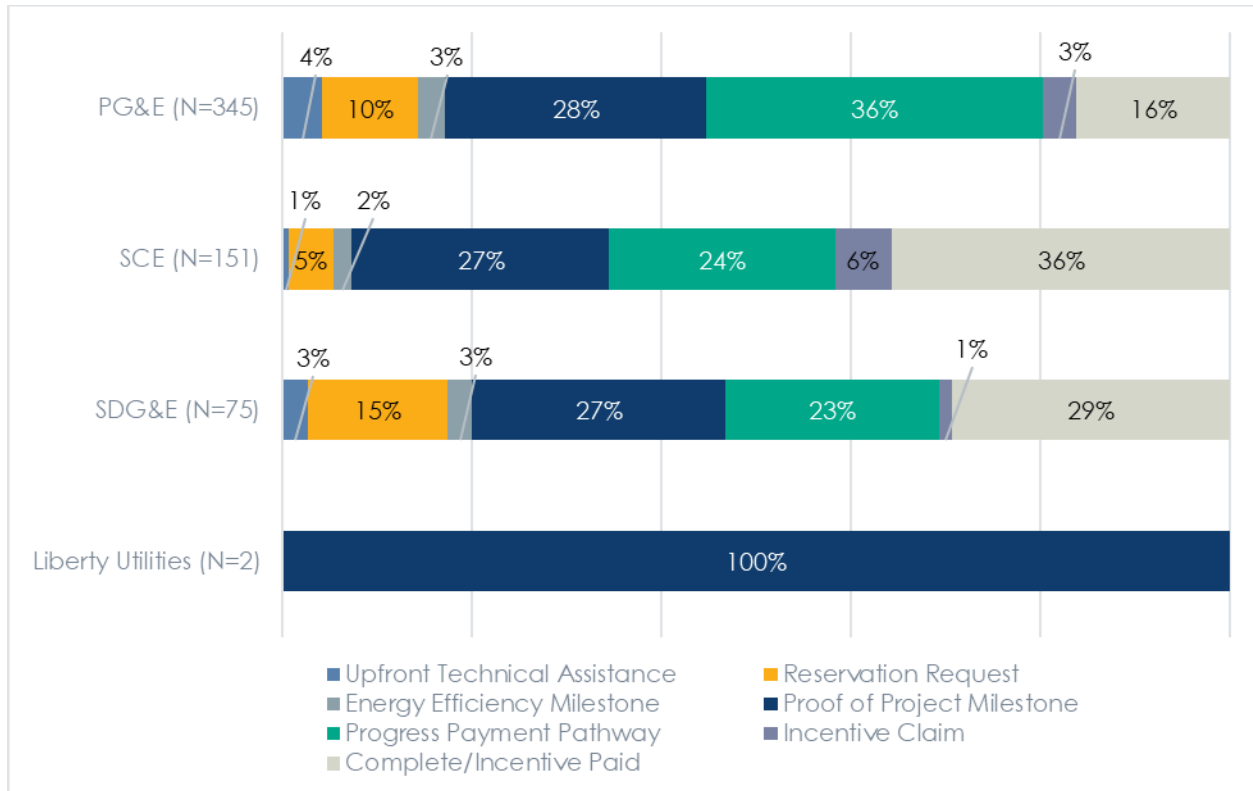
Figure 8 – Milestones by IOU Territory

Program	Upfront Technical Assistance	Reservation Request	Energy Efficiency Milestone	Proof of Project Milestone	Progress Payment Pathway	Incentive Claim	Complete/ Incentive Paid
PG&E	14	35	10	95	123	12	56
SCE	1	7	3	41	36	9	54
SDG&E	2	11	2	20	17	1	22
Liberty Utilities	0	0	0	2	0	0	0
PacifiCorp	0	0	0	0	0	0	0
Total	17	53	15	158	176	22	132

N = 573



Figure 9 – Percentage of Active Applications by Milestone and Territory.¹⁰



N = 573

During this reporting period, application submissions and project completion remained steady while the majority of projects moved into later phase milestones, most prominently the Progress Payment Pathway. The historical total count of progress payments issued to date nearly doubled in this reporting period. The increase in the number of applications entering and completing the Progress Payment Pathway indicates many projects have reached mechanical completion and are likely awaiting permission to operate prior to submitting their Incentive Claim Package. These positive trends show project closeout is likely to increase in the next reporting period.

In Q1-Q2 2024, 10 new Track A applications have been submitted. Of these applications, seven projects have received Track A approval, one is under review, one is pending a data request, and one was cancelled after a call with the property owner

¹⁰ PacifiCorp is not represented in Figure 9 because no projects are active in this territory at the time of reporting.



uncovered the property is not deed restricted and therefore ineligible. The lengthier review process for Track A projects can be attributed to the additional support property owners require during the SOMAH application process as they familiarize themselves with the program requirements, platforms, etc. SOMAH's technical assistance and affordable housing specialists ensure property owners receive guidance through every part of the Track A application process. More information can be found in Section 3.5, Technical Assistance.

Figure 10 – Applications by Incentive Track

Assigned Incentive Track	Active	Complete/ Incentive Paid	Cancelled/ Withdrawn	Total
Track A	24	0	44	68
Track B	417	132	292	841

N = 909

Along with the incentive track type (Track A or Track B) differentiating applications, the eligibility pathway for how the project qualifies for SOMAH is another key distinction. Projects must satisfy at least one of the following options:

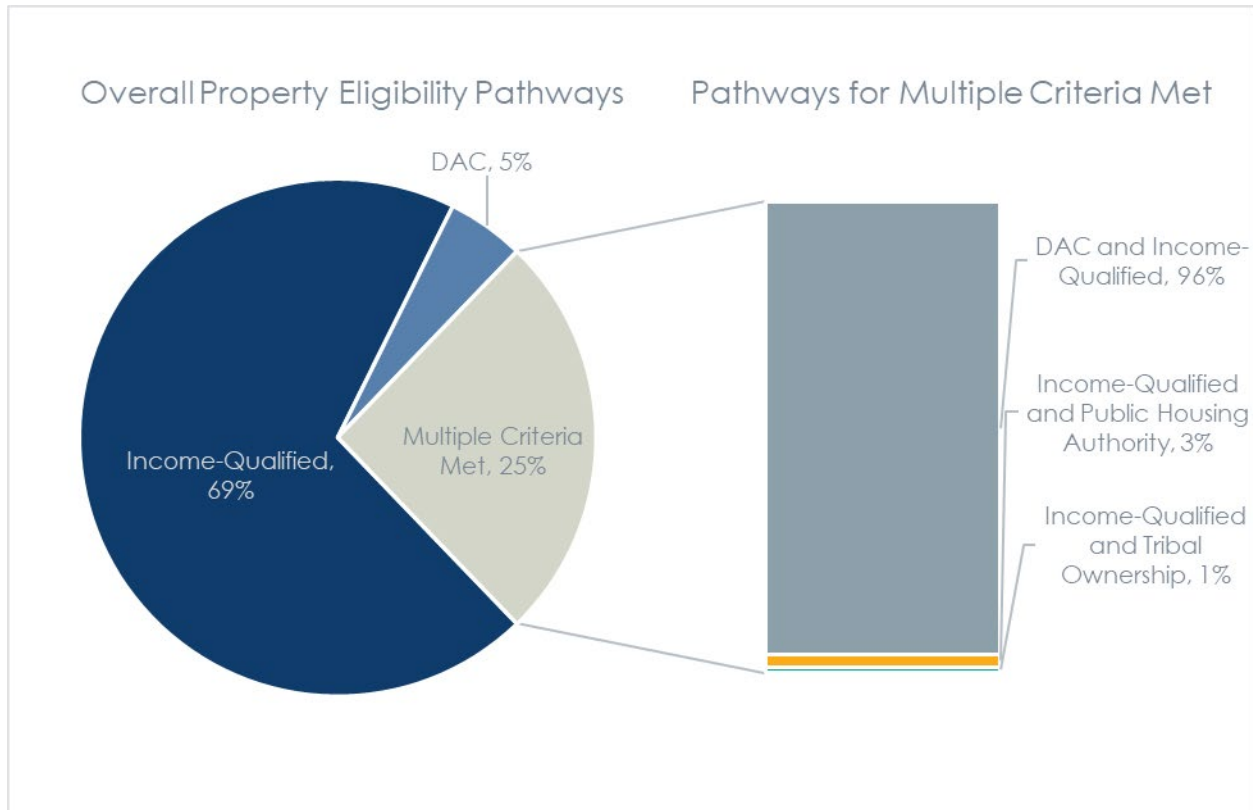
- Income-Qualified: 66% of property residents have incomes at or below 80% AMI as determined by the California Department of Housing and Community Development.
- DAC: The property is located in a disadvantaged community (DAC) as identified by CalEPA.
- Tribal Ownership: The property is owned by a California Native American tribe.¹¹
- Public Housing Authority: The property is rental housing property that is owned by a public housing authority or public housing agency.¹²

¹¹ As defined in Section 21073 of the Public Resources Code, "tribe" is defined as a California Native American tribe. "California Native American tribe" means a Native American tribe located in California that is on the contact list maintained by the Native American Heritage Commission for the purposes of Chapter 905 of the Statutes of 2004. Please contact the SOMAH PA for additional details on the Native American Heritage Commission list and related eligibility.

¹² To qualify under Public Housing Authority, the property must be owned by either a public housing authority created pursuant to the Housing Authorities Law [Chapter 1 (commencing with Section 34200) of Part 2 of Division 24 of the Health and Safety Code] or a public housing agency, as defined in Section 1437a of Title 42 of the U.S. Code.

Figure 11 breaks down the eligibility pathways under which active SOMAH projects qualified. Figure 12 shows the breakdown between application track and eligibility pathways during this period of performance.

Figure 11 – Overall Property Eligibility Pathways

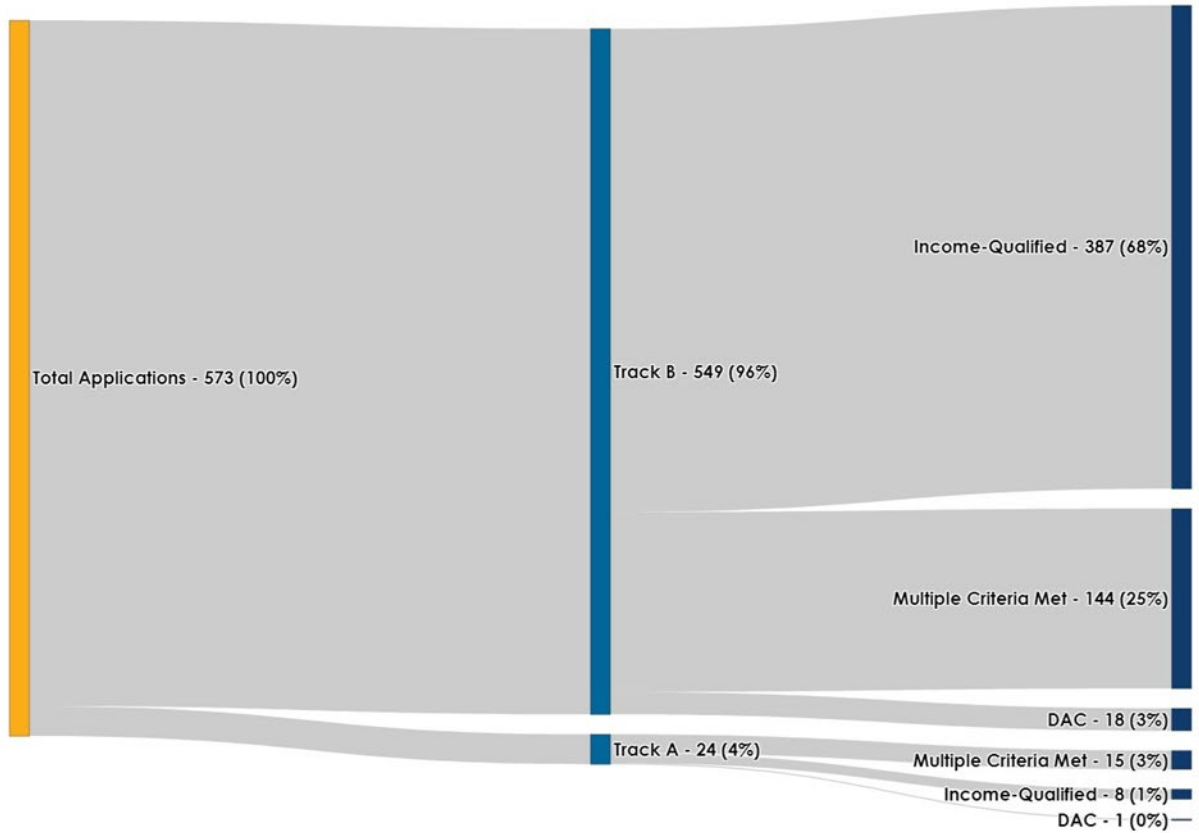


Of the 573 applications¹³ received, approximately 69% qualified through only the income pathway, approximately 5% qualified through just the DAC pathway, and approximately 25% qualified for the program through multiple criteria met. In the first two years of the program, participation of DAC projects fluctuated between 25-30% of SOMAH projects. At the close of this reporting period, the overall percentage of all applications located in DACs fell slightly from 31% to 29%, staying within previous fluctuations.

¹³ Active applications are those that have not been cancelled or withdrawn. This figure includes applications pending reservation approval that have not had their project information fully finalized yet.



Figure 12 – Property Eligibility by Incentive Track¹⁴



At the end of 2020, the SOMAH PA provided the Assigned CPUC Commissioner’s office a memo¹⁵ with potential options for increasing participation by eligible properties located in DACs and conducted stakeholder outreach in 2021 to determine the best path forward. Combined with ME&O strategy and programmatic efforts to prioritize projects in DACs, the SOMAH PA also included DAC benchmark language in the SOMAH Program Handbook 5 approved by the CPUC in April 2022. “In an effort to prioritize and increase participation in DACs, the SOMAH PA has set a programmatic

¹⁴ Calculations used for this visual are subject to rounding and total percentages may not equal 100%.

¹⁵ The January 2021 [Semiannual Progress Report](#) includes a summary of the 2020 CPUC DAC Participation Memo.



benchmark or target of 40% of all participating SOMAH projects to be located in DACs by 2026. The SOMAH PA acknowledges this will take the support of program partners and stakeholders and may require new strategies and potential program changes to ensure the program can meet this target," Handbook 5, Section 1.1.3, SOMAH Program Goals.

Figure 13 further breaks down the property eligibility statuses by count and percentage to highlight the number of DAC and Tribal Ownership-qualifying properties.¹⁶ The SOMAH PA continues to consider ways to increase participation for DAC-qualifying properties and will continue work to meet the benchmark and support overall program goals. Two impactful updates that have supported increasing DAC project participation in SOMAH are: 1) the Handbook 5 update to uphold eligibility for otherwise eligible properties within both the current and immediately previous version of the CalEnviroScreen; and 2) the inclusion of federally recognized tribal lands as part of the CalEnviroScreen DAC designation. Both updates support additional potentially eligible properties to qualify for SOMAH through their DAC status.

Since implementing Handbook 8's two additional eligibility pathways, no new projects have qualified solely through the Tribal Ownership or Public Housing Authority. However, three active projects that had previously qualified are tribal-owned. Based on eligible property data reviewed by the SOMAH PA, these eligible properties that are owned by a tribe or public housing authority would also qualify for SOMAH by being in a DAC or low-income. As a result, projects that qualify through the Tribal Ownership or Public Housing Authority pathway and are in a DAC or Income-Qualified would be classified under "Multiple Criteria Met".

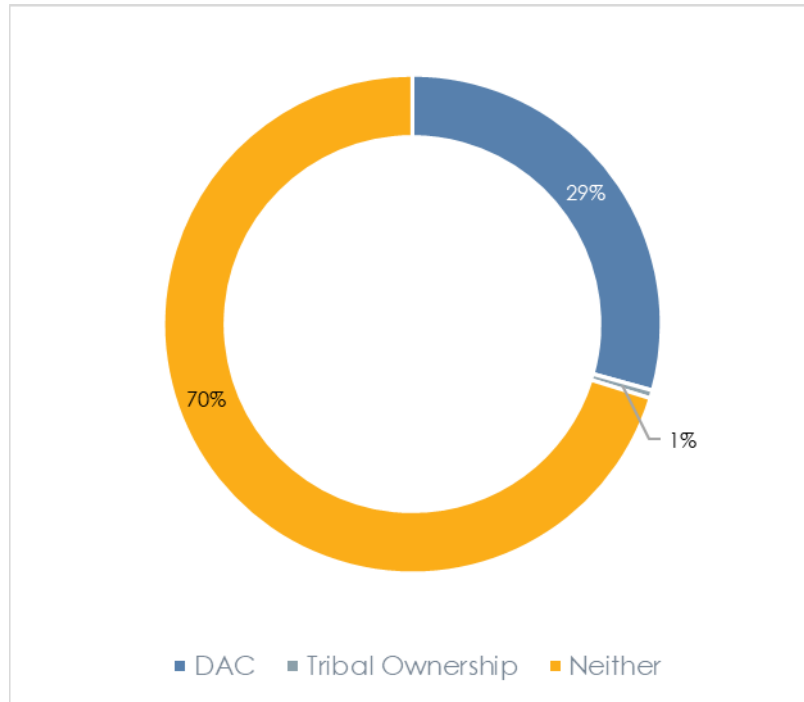
¹⁶ DACs are not distributed evenly across the IOU territories. The percentage of census tracts that are DACs in each IOU territory varies, along with the overlap of eligible properties in a DAC by each IOU territory. The SOMAH PA does not know of any properties located in DACs in Liberty Utilities or PacifiCorp territories.

Figure 13 – Property Eligibility by Reservation Status

Property Eligibility	Pending Reservation Approval	Reservation Approval Received	Complete/ Incentive Paid	Cancelled/ Withdrawn
Multiple Criteria Met	19	98	42	73
DAC	1	15	3	25
Income-Qualified	29	279	87	237
Tribal Ownership	0	0	0	0
Public Housing Authority	0	0	0	0
Data not reported	0	0	0	1

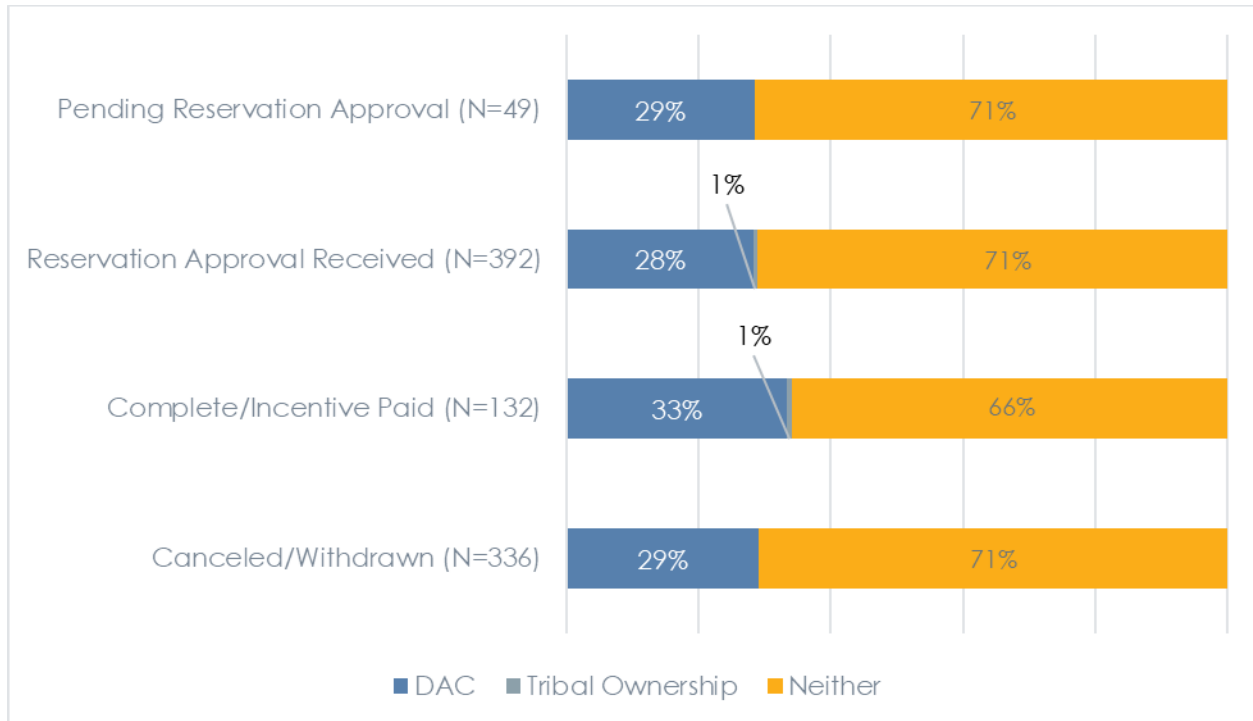
N = 909

Figure 14 – Property Eligibility by DAC/Tribal Ownership Status



N = 909

Figure 15 – Property Eligibility by Reservation Status



N = 909

The Reservation Request Milestone is the application entry point for Track B projects, the majority of SOMAH's application pipeline, and the second application step for Track A projects. The Reservation Request Package is a robust and distinguishable milestone for all projects to complete. Split into Phase I and Phase II, the Reservation Request Package includes up to eight required documents and an application deposit (for nonpriority groups) before achieving reservation approval in Phase II of the Reservation Request Milestone. The three main components of the Reservation Request Milestone are: 1) eligibility verification through review of the associated eligibility documentation; 2) IOU data request for consumption data and system sizing; and 3) the application deposit (for nonpriority groups.¹⁷) before issuing a reservation approval. This approval is an important achievement for projects and for programmatic data and milestone tracking.

¹⁷ An application deposit invoice will not be issued, nor is an application deposit required for priority group applications. Priority groups include DAC and tribal properties.



As depicted in Figure 15, at the close of Q2 2024, there were 49 applications yet to receive reservation approval. Track A applications that have not yet submitted a reservation request account for 16 of the 49 applications. The remaining 33 applications are in the Reservation Request Milestone and of those, 16 applications are currently in Processing Data Request status, in Data Results Shared status or Pending Application Deposit status before receiving final reservation approval. The remaining 17 applications are in Reservation Request Submitted, Suspended or Review status. Most of the program's applications have passed the Reservation Request Milestone; 392 applications have received reservation approval, and 132 are completed and paid projects.

Not only is reservation approval a significant achievement for an application, but it also signals an important handoff of information between the SOMAH PA and IOUs. Based on mandates in the CPUC's D.17-12-022, the SOMAH PA sends monthly reports to the IOUs for the Multifamily Energy Savings Program. Previously named the Energy Savings Assistance Program (ESA), the Multifamily Energy Savings Program was launched to provide in-unit and whole-building upgrades for low-income residents. The Multifamily Energy Savings Program is split into two territories, the Northern and Southern California territories. The Southern program includes customers in SCE and SDG&E territories while the Northern program serves PG&E customers.

The SOMAH PA sends project referrals to the partner IOUs monthly and annually. Projects that have reached reservation approval status are shared monthly, along with a rolling list of all projects with approved reservations. These reports are an important part of the data exchange between the SOMAH PA and IOUs, which creates "warm" ESA and Multifamily Energy Savings leads that will hopefully become active ESA participants. The outcome of the monthly reported leads is collected annually in Q4 with returned data from the IOUs based on completed projects that have received SOMAH incentives. The first IOU data collection was completed in Q4 2021 with information on whether the SOMAH projects materialized into ESA Common Area Measures or in-unit referrals. With the limited number of completed projects at the time of the request in 2021, the available data for ESA referrals increased significantly with the 2023 data request. The Multifamily Energy Savings Program launched on July 1, 2023. The SOMAH PA will report on successfully enrolled Multifamily Energy Savings projects in future reports.

With the increase in completed projects for which to request information, the SOMAH PA was able to collect reportable feedback from the 2023 annual ESA referral data request from the IOUs with completed SOMAH projects. The annual ESA referral data request is a rolling list of completed projects. Since 2021, the IOU reporting captured ongoing efforts of ESA Common Area Measures and in-unit engagement for SOMAH



projects. As of 2024, the IOU reporting will capture Multifamily Energy Savings efforts for SOMAH projects. The summary below shows the available information on the number of projects shared in the PA's annual 2023 Q4 request to the IOUs and the level of engagement across each territory.

SCE

- 46 projects referred, equating to 4,420 tenant units.
- 15 projects enrolled in ESA Common Area Measures.
- 404 units enrolled in ESA in-unit.
- Measures installed include HVAC, smart thermostats, re-lamping, indoor fixtures, outdoor fixtures, refrigerator replacement, pool pump and weatherization.

PG&E

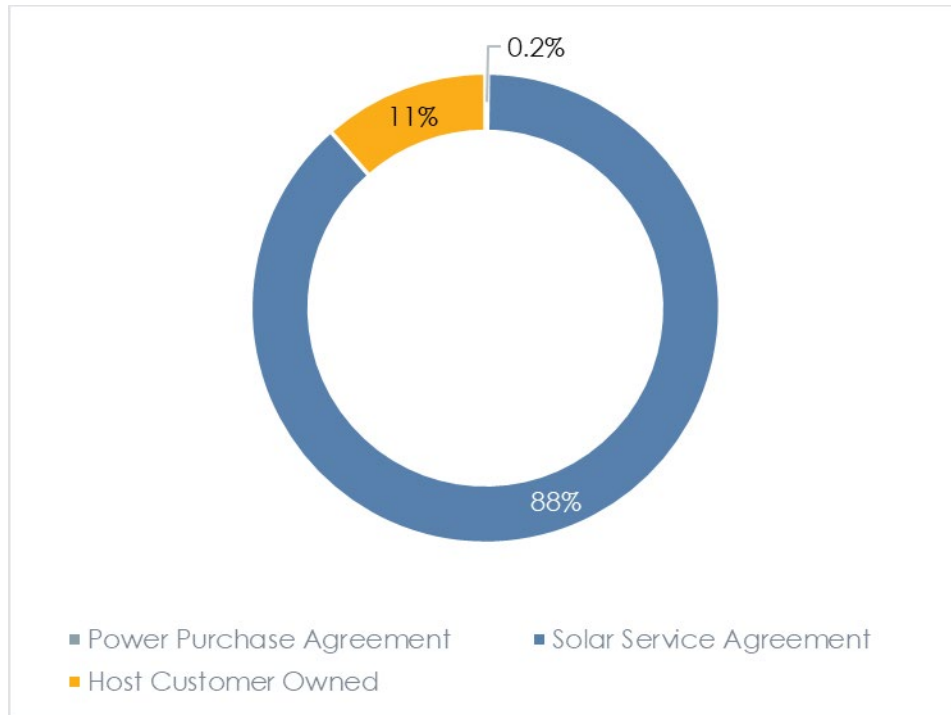
- 49 projects referred, equating to 3,886 tenant units.
- 14 projects enrolled in ESA.
- No units enrolled in ESA in-unit.
- Measures installed include LED replacements and retrofit kits, pool pump, efficient showerhead, recirculation pump, sink aerators, thermostat, electronically commutated motor pump and tankless water heater.

SDG&E

- 21 projects referred, equating to 1,943 tenant units.
- No projects enrolled in ESA Common Area Measures.
- 5 units enrolled in ESA in-unit.
- Measures installed include LED bulb replacements, re-lamping, smart strips, in-home energy education and outreach, and assessment.

Information on this referral collection and data reporting will continue to be shared as additional projects are completed and data is collected annually.

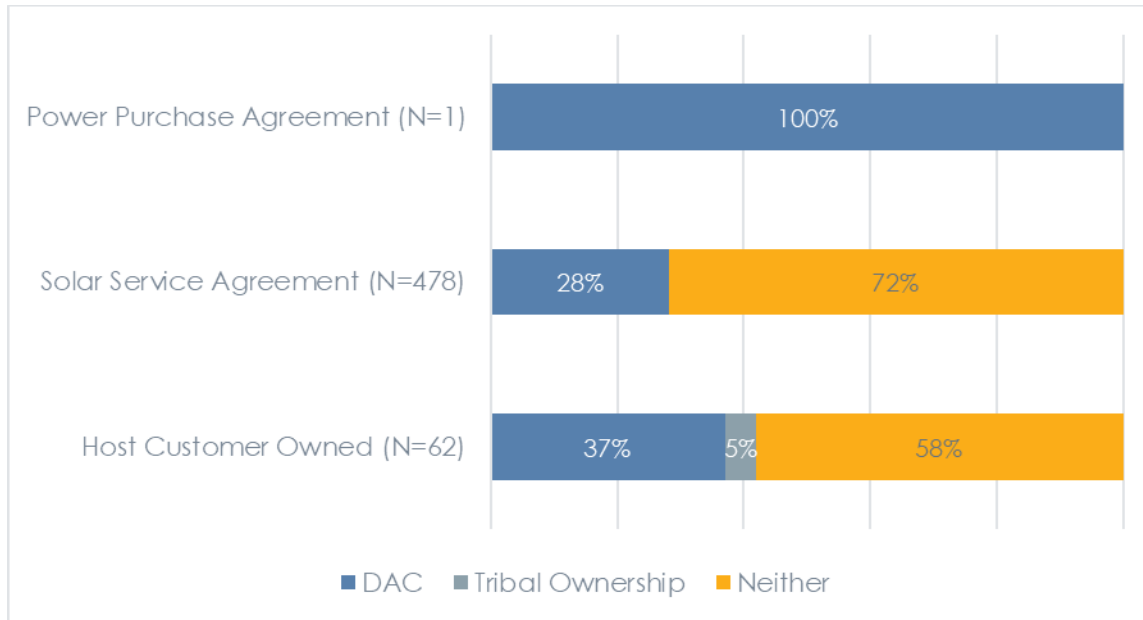
Figure 16 – System Ownership Type



N = 541

As Figure 16 shows, the majority of SOMAH projects, 88%, are Solar Service Agreement (SSA) systems, similar to what some contractors term power purchase agreements (PPAs). With the Handbook 5, the SOMAH PA began differentiating contract types between SSAs and PPAs to capture the most accurate information based on the solar PV contract. Feedback shared by past third-party program evaluations, and by both property owners and contractors, suggests the third-party ownership option is more financially feasible for property owners given the minimal upfront costs associated with this arrangement. Additionally, some contractor companies have preferred system financing/ownership options for their installations, which is a likely influence on the system ownership breakdown for the current application queue. The SOMAH PA has continued to engage with interested parties to support additional PPA providers approved for the program. Additional information on PPA providers can be found in Section 3.2.3, Contractors.

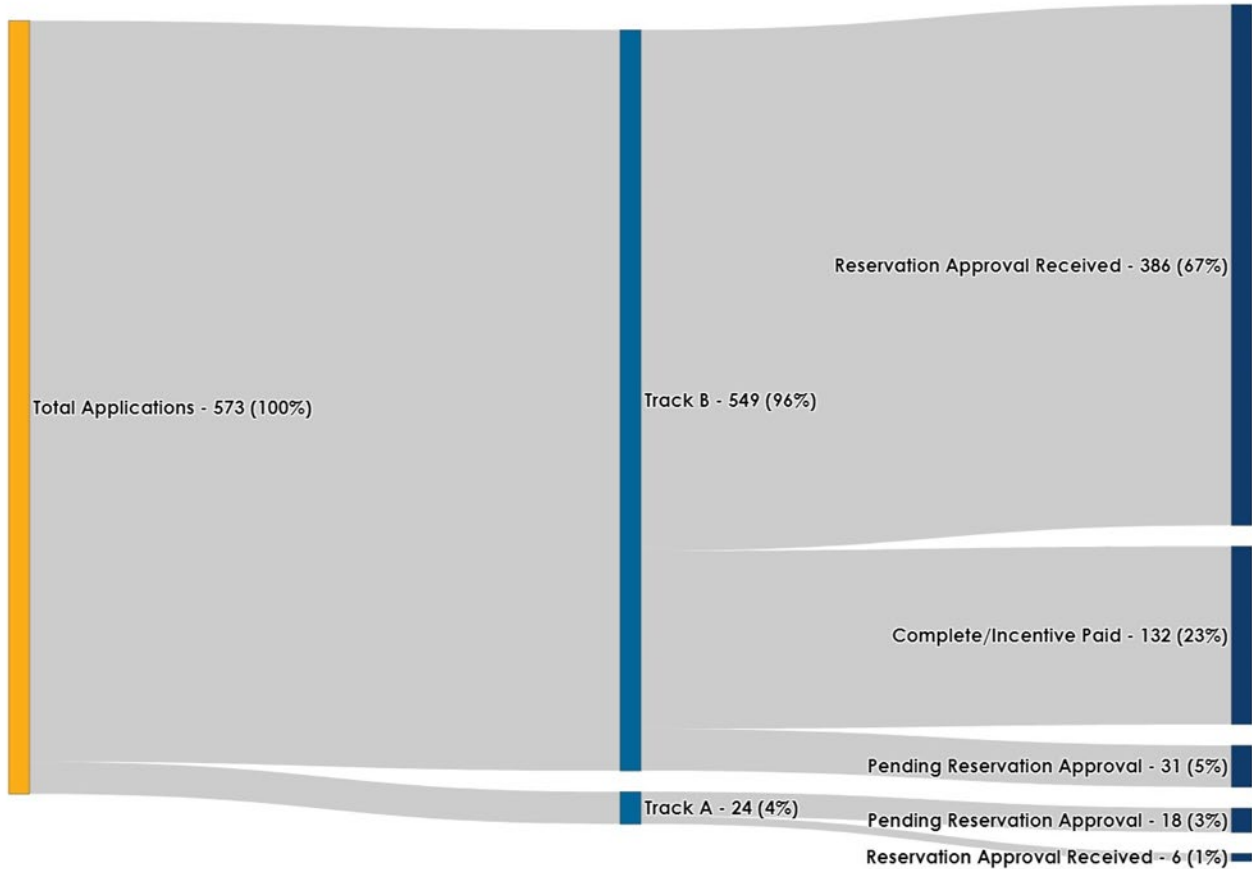
Figure 17 – System Ownership Type by Property Eligibility



N = 541

Figure 17 further segments system ownership types by DAC, Tribal Ownership or neither DAC nor Tribal Ownership properties. The split of DAC and non-DAC projects shows a larger percentage of host customer-owned systems located in DACs compared with third-party owned systems. Although different, the percentage of systems located in DACs for host customer-owned systems, SSAs and PPAs range from 28-37% by ownership type.

Figure 18 – Application Reservation Status by Incentive Track¹⁸



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

The goal for the Energy Efficiency Compliance Milestone (EECM) is to assess the project site for energy efficiency opportunities, focusing on reducing site consumption before producing solar energy at the property. There are two pathways to fulfill the EECM requirement: Pathway 1 – energy efficiency whole-building walk-through audit and Pathway 2 – recent or active participation in an approved whole-building energy

¹⁸ Calculations used for this visual are subject to rounding, and total percentage may not equal 100%.



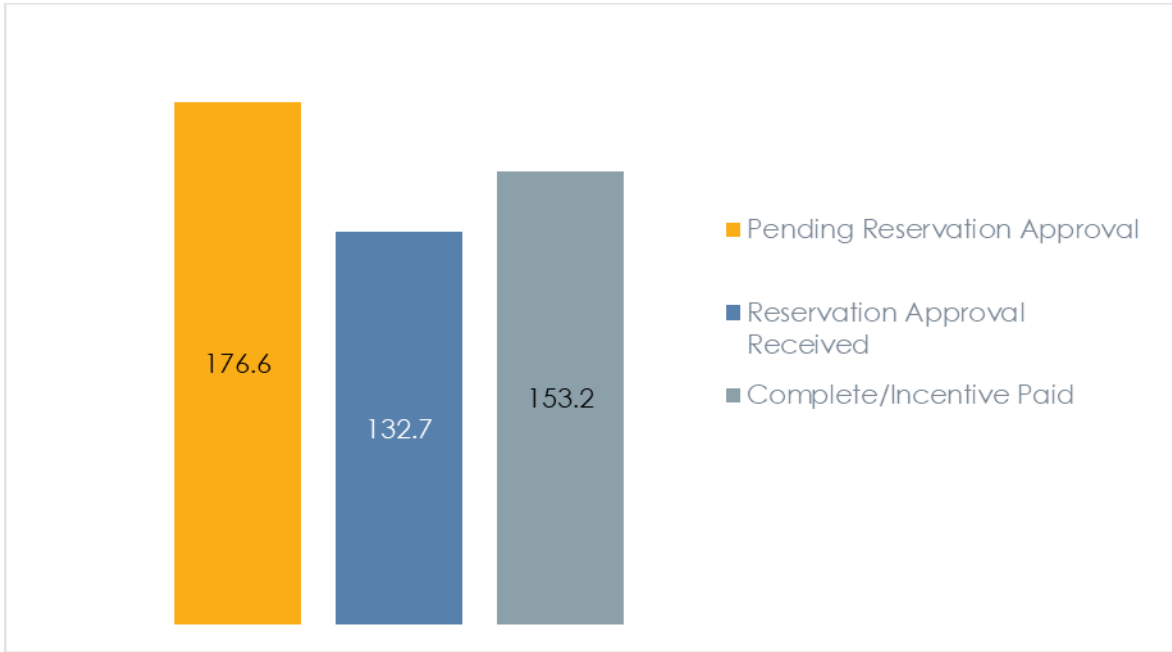
upgrade program, documentation of a recent California Tax Credit Allocation Committee rehabilitation or documentation that the property was completely constructed under a recent version of Title 24.

To accommodate COVID-19 challenges with completing Pathway 1, whole-building walk-through audit, the SOMAH PA introduced the EECM Postponement option in early July 2020 as a temporary program response, allowing projects that received reservation approval to postpone submitting their EECM documentation up to submission of the Incentive Claim Milestone. At the Q2 2021 Public Forum, the SOMAH PA announced an end to the EECM Postponement option effective September 13, 2021, and continued to honor projects that were approved for postponement with no impacts to those project timelines. As projects continue to progress toward project completion, the postponed EECM documentation is submitted to and reconciled by the SOMAH PA. In the first half of 2024, the majority of outstanding applications in EECM postponement advanced toward project completion and fulfilled the EECM requirement. The SOMAH PA anticipates the remaining applications with EECM postponement will be submitted and reach the Incentive Claim Milestone by the end of the year.

Completing application milestones is an important part of progressing applications and collecting project data for the program. In this seventh reporting period for SOMAH, the program has applications in all stages of the application, construction and completion processes representing each of the program's four application milestones (plus the fifth optional milestone, Progress Payment Pathway). The Reservation Request and Energy Efficiency Compliance Milestones are important steps in determining project eligibility and the eligible system size, as they consider consumption history and available energy efficiency upgrades. Proof of Project and Incentive Claim Milestones provide information on the contracted and executed system as well as proof of compliance with the program's job training and tenant education requirements.

At the close of Q2 2024, 22 projects are currently working through the Incentive Claim Milestone. Of those Incentive Claim projects, 15 projects are in the inspection phase, five projects are pending payment, and two are in suspended status awaiting corrections. With the implementation of increased incentives, the SOMAH PA anticipates an increase in projects moving toward incentive payment in the second half of 2024.

Figure 19 – Average System Size (kW) by Reservation Status



N = 556

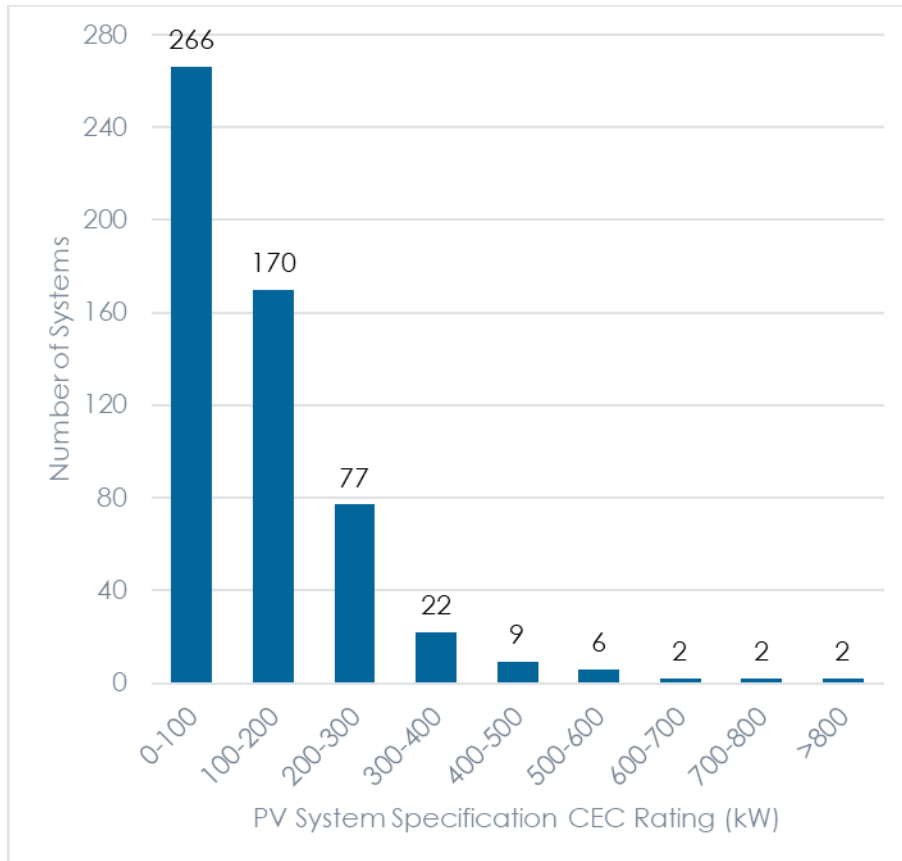
Validating each project’s system size with aggregated annual electrical consumption history from IOU data requests is a key step of the reservation request, prior to approval. The historic electrical consumption directly influences the system’s final sizing. Figures 19, 20 and 21 outline system size statistics for the average and largest projects across the IOU territories.

Figure 20 – Average System Size (kW) by IOU Territory and Reservation Status

Program	Pending Reservation Approval	Reservation Approval Received	Complete/Incentive Paid	Cancelled/Withdrawn
PG&E	194.5	119.7	112.5	178.0
SCE	60.3	173.3	200.4	212.4
SDG&E	188.8	125.4	140.7	160.3
Liberty Utilities	0.0	74.2	0.0	0.0
PacifiCorp	0.0	0.0	0.0	111.6

N = 672

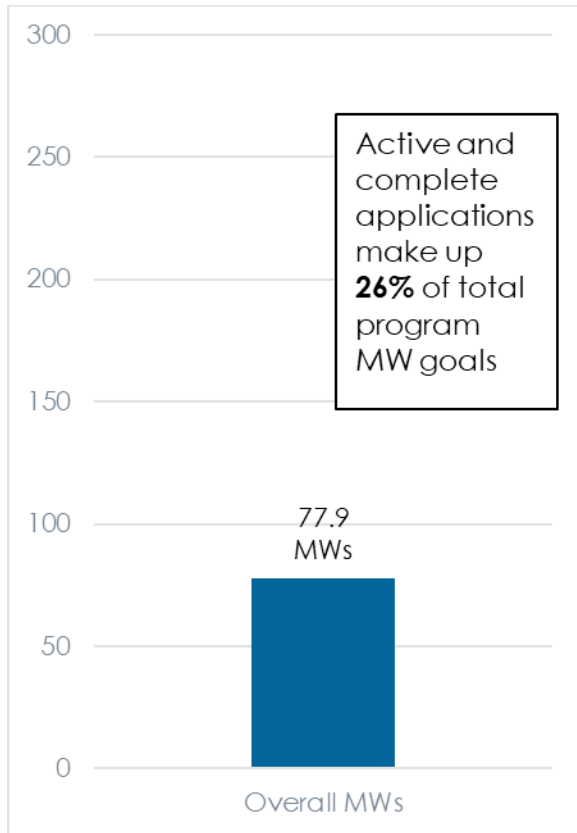
Figure 21 – Distribution of System Sizes (kW)



N = 556

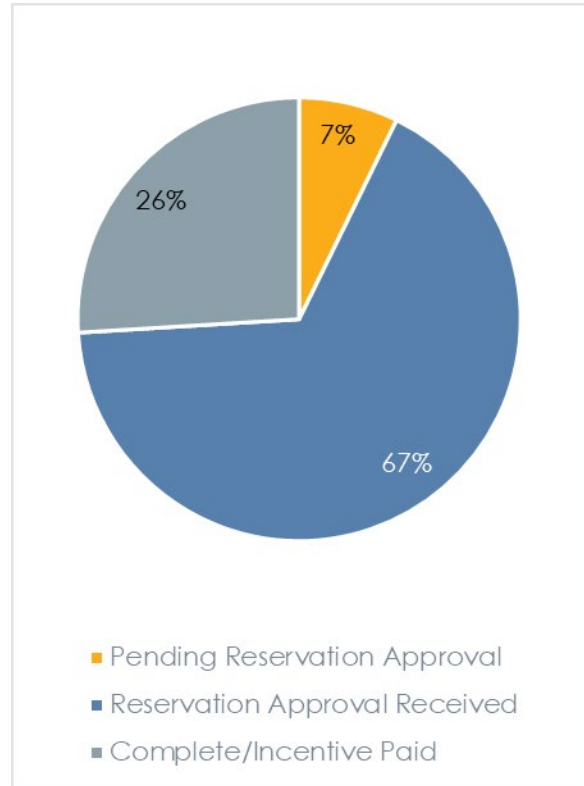
From the projects with approved reservations, application data from PowerClerk shows projects reduce their system size by an average of 24% from initial submission. The trend to reduce the system size after IOU consumption data sharing (post-reservation submittal and pre-reservation approval) continues. However, application data from PowerClerk also shows newer projects (submitted later in 2021-23) are trending with smaller adjustments overall. Of the 45 applications that reached reservation approval in Q1-Q2 2024, 41 projects adjusted their system size during the Reservation Request Milestone, while the remaining four maintained their originally submitted system size through reservation approval. Of the 41 projects that adjusted system size, 14 projects increased the system size from what was originally submitted, a different trend from previous years. Due to available program funds and lack of a waitlist, contractors have more flexibility when submitting a SOMAH application and use the Reservation Request Milestone to fine-tune their system size prior to signing the Reservation Request Form.

Figure 22 – Progress to 300 MW



N = 556

Figure 23 – Percentage of Program MW by Reservation Type



N = 556



Additionally, the average system cost is \$4.31/watt CEC-AC¹⁹ with a total expected aggregated annual output of 93,599,439 kWh²⁰ for the active²¹ SOMAH projects in queue. Completed projects made up 23% of total application volume at the close of Q2 2024. This percentage remains consistent with the ratio of active to completed applications at the end of 2023, illustrating a continuation of the 2023 trend that saw the number of new applications and the number of completed projects increasing proportionally. The percentage of pending reservation approval projects decreased from 7% at the end of 2023 to 5% at the close of this reporting period. The decrease in the percentage of applications awaiting reservation approval is likely due to new efficiencies in the reservation request process leading to faster processing times and therefore shorter reservation approval timelines as well as a slight decrease in the number of newly submitted applications this reporting period compared to last.

Figures 24 and 25 show the geographic distribution of property locations for applications received and completed projects to date. A more detailed view is provided for higher density project regions in the San Francisco Bay, San Diego and greater Los Angeles areas.

¹⁹ Project costs are not considered verified until review of the installation contract and associated costs at the Proof of Project Milestone. The numbers used in this average are estimates reported for the projects currently in queue and are likely to fluctuate in future reporting periods.

²⁰ Expected aggregated annual output is an estimate based off the PV equipment and system configuration specifications currently listed for all active applications in PowerClerk. This figure is subject to change based on updated system designs for projects in queue. System components and configuration are not verified until the final inspection at the Incentive Claim Milestone, which directly impact the expected output of the PV system.

²¹ Active project means an application is submitted to the queue and is under review or pending completion. Completed, cancelled or withdrawn applications are not included in this figure.

Figure 24 – Active Project Density and Location Visualizations

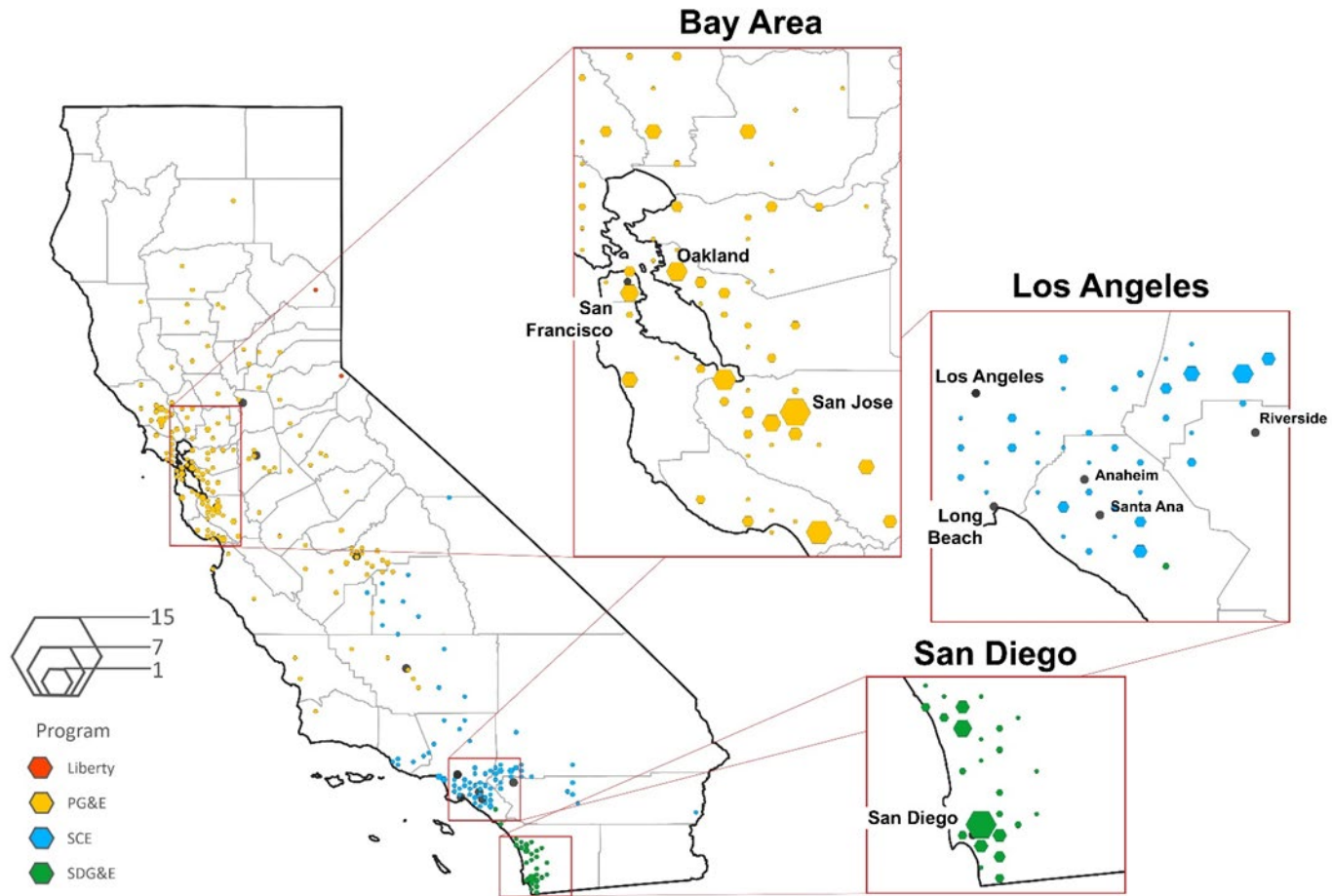
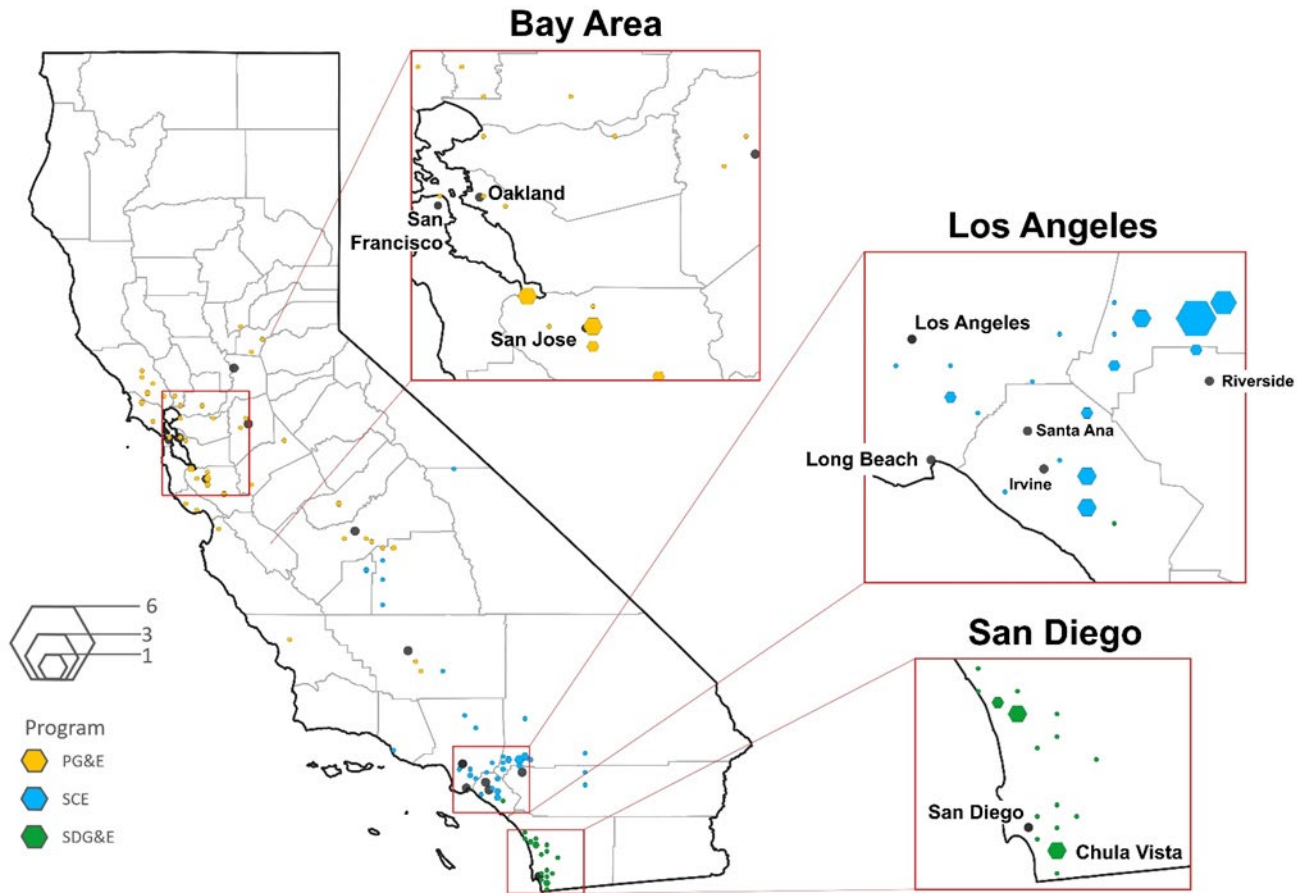


Figure 25 – Completed Project Density and Location Visualizations





3.1.2 Program Payments

The Progress Payment Pathway was designed to alleviate cash flow issues reported by participating contractors and help dismantle barriers to increased contractor diversity. The development of progress payments included PA consultation with program participants and stakeholders to develop the two-payment pathway for progress payments that launched in April 2021. The eligibility window for the minimum time requirement between progress payment and incentive claim is two months. Depending on the application timeline and installation status, a project can participate with the standard one-payment at the Incentive Claim Milestone or apply for a progress payment after completing the Proof of Project Milestone (PPM). A project is eligible for the Progress Payment Pathway after it has received a PPM approval, and the system has been fully installed or mechanically complete. Mechanical completion is defined as the point at which all PV equipment has been installed, including the net generation output meter socket, and the system wiring has been completed, but the authority having jurisdiction and local utility inspections have not yet taken place, and the system has not yet been granted permission to operate (PTO) from the utility. If a PV system has already been granted PTO, the project is not eligible for a progress payment. In addition, the incentive claim deadline can be no less than two months from the Progress Payments Pathway submission date.

All projects requesting a progress payment are required to complete a live virtual walkthrough with the SOMAH PA to verify the system installation. This consists of a video call, with the participant walking the SOMAH PA through the site to show the system components, including the installed PV modules, installed inverter and the project site address with the street number visible. After a completed virtual walkthrough, the SOMAH PA grants approval for the progress payment, which is 60% of the calculated incentive amount. The remaining incentive amount is issued after an approved incentive claim and verified final inspection by the SOMAH PA. Alternatively, should a project be ineligible or not interested in the Progress Payment Pathway, the full incentive is issued as a single payment to the designated payee after an approved incentive claim and verified final inspection as a standard incentive payment.

Upon launching the progress payment offering, additional data fields were added to the working data set on the California Distributed Generation Statistics [website](#) that indicates an approved opt-in to the Progress Payment Pathway and the resulting progress payment amount. Since launching the Progress Payment Pathway in April 2021, the offering's popularity has continued to increase over time, now totaling 244 projects in four years of availability. The program's progress payment history is summarized by the cumulative payment list below:

- June 2024: 244 progress payments issued



- December 2023: 129 progress payments issued
- June 2023: 80 progress payments issued
- December 2022: 58 progress payments issued
- June 2022: 39 progress payments issued
- December 2021: 11 progress payments issued
- June 2021: 2 progress payments issued

The increase in progress payments year over year has remained consistent throughout its launch. After its first year in 2021, 2022 saw 47 additional progress payments issued, and 2023 saw 71 additional progress payments issued. Q1-Q2 2024 saw 115 additional progress payments, the most payments issued in a reporting period to date. In total, 49 of the projects that enrolled in the Progress Payment Pathway have reached the Incentive Claim Milestone and have received their final incentive payment. The timeline for these projects shows the progress payment offering allowed the participants to receive the benefit of a partial incentive payment, on average, eight months prior to their final incentive payment. This timeline supports the SOMAH PA's goal to alleviate financial barriers and support project viability.

After receiving 75 new progress payment requests in 2023, Q1-Q2 2024 saw 112 more project payment requests submitted. The program's progress payment request history since inception is summarized below:

- January–June 2024: 112 progress payment requests received
- July–December 2023: 53 progress payment requests received
- January–June 2023: 22 progress payment requests received
- July–December 2022: 13 progress payment requests received
- January–June 2022: 28 progress payment requests received
- July–December 2021: 9 progress payment requests received
- April–June 2021: 4 progress payment requests received

Half (50%) of applications eligible to receive the two-payment pathway have opted into progress payment. At the end of Q2 2024, of the eight contractors with completed projects, five of the contractor companies have used the Progress Payment Pathway at least once. With advertising progress payment to contractors and many projects reaching mechanical completions, the use of Progress Payment Pathway increased in Q1-Q2 2024 and is expected to continue increasing throughout the year. Figure 26 outlines payment details for the program with a summary of the number of progress payments and standard payments issued and the applicable associated dollar amounts since its launch.



Figure 26 – Program Payment Statistics²²

Program	Progress Payments Issued	Progress Payment Amount	Final Incentive Payments Issued	Final Incentive Payment Amount	Total Incentive Payment Amount
PG&E	159	\$23,689,270	52	\$8,642,539	\$32,331,809
SCE	58	\$13,823,863	53	\$15,885,424	\$29,709,287
SDG&E	27	\$4,616,455	22	\$4,980,769	\$9,597,225
Liberty Utility	0	\$0	0	\$0	\$0
PacifiCorp	0	\$0	0	\$0	\$0
Total	244	\$42,129,588	127	\$29,508,732	\$71,638,321

Eighteen projects in Q1-Q2 2024 received a final incentive payment. In total, 127 projects have received their final payment, and 38% of those projects opted for a progress payment. The program's first final payment was issued in Q4 2020, and there was a 6-month gap in payments in the beginning of 2021. Payments picked up in the second half of 2021, and from then on, final payments have consistently been issued. With the increase in progress payments in Q1-Q2 2024, it is expected that more than half of the projects that received their final payment will have chosen the two-payment pathway rather than the standard one-payment option. The program's final payment history leading up to 127 final payments is summarized below:

- June 2024: 127 final payments issued
- December 2023: 109 final payments issued
- June 2023: 98 final payments issued
- December 2022: 77 final payments issued
- June 2022: 38 final payments issued
- December 2021: 14 final payments issued
- June 2021: 0 final payment issued
- December 2020: 1 final payment issued

In Q1-Q2 2024, 115 projects received a progress payment, and one of those projects received a final incentive payment. Not all the reported projects have completed installations and received the final incentive payment as shown in Figure 26. There have

²² Progress Payment Amount total and Final Incentive Payment Amount total include some invoiced, pending payments.



been no instances of projects dropping out between the disbursement of progress payments and the completion of the incentive claim process. Future Semiannual Progress Reports will continue to include an update on program payment activity as highlighted in Figure 26, as well as analysis of payment timelines and progression details as additional projects are completed and paid.

Increased Incentive Reporting

As of July 1, 2024, 176 projects of the maximum 306 eligible applications submitted the required supporting documentation and were fully approved for the increased incentive offering to existing applications that resulted from Handbook 7. To date, projects that received the revised incentive had an average 12% increase in total incentive. Compared to the pre-revised incentive amounts, over \$5.5 million more in incentive funding was allocated to applications that had their revised incentive requests fully approved. The SOMAH PA expects the remaining eligible conditionally approved applications to receive higher incentives by the next reporting period given the milestone deadlines for the relevant applications.

Application Deposits

The electronic payment option for application deposits has become a very popular option for participants, which was a motivation for the SOMAH PA to streamline other payment and incentive claim processing. The electronic payment offering started with application deposits and was further extended to progress payments and final incentive claim payments as well. At the close of this reporting period, all but five incentive payments and 15 deposit fee refund payments issued were via electronic payment method.

Clarification provided by the SOMAH PA's June 2024 Advice Letter 153-E, outlines that previously forfeited application deposits may be re-used only for cancelled projects that re-enter with a new application, and only up to the total dollar amount of the prior application deposit. The clarification of the ability to re-use forfeited deposits for project re-entry was made to further address participation barriers and financial burden for program participants, while still retaining the programmatic benefit the deposit requirement brings to elevating the quality of incoming applications. This additional detail is reflected in the [Application Process and Documents](#) section of the SOMAH website under the Application Deposits tab.

3.1.3 Online Bidding Tool

The online bidding tool is a platform used to connect property owners with eligible SOMAH contractors, providing an apples-to-apples bid comparison. The platform is available for all SOMAH participants and supports the multiple bid requirement for Track



A projects. The online bidding tool maintains a repository of eligible SOMAH contractors who have completed the Contractor Eligibility Training webinar and registered their primary contact information with the SOMAH PA.

The online bidding tool serves three distinct functions. First, it allows the host customer to indicate their interest in receiving a bid from up to eight contractors of their choice. This encourages the host customer to do basic research on a contractor ahead of time, such as researching reviews, and then gives them the opportunity to select up to eight contractors. After the customer's selection of bidders, the tool notifies the eligible SOMAH contractors, who then can accept or decline the bid request. If the contractor accepts the bid request, they can contact the host customer to begin preparing a site-specific bid proposal. Finally, once all contractors who have accepted the bid request have completed and submitted proposals, the tool aggregates basic information about the proposal into a single user interface, which allows the host customer to compare topline proposal information, including project cost, size, estimated date of completion and ownership type. The online bidding tool integrates with SOMAH's Project Bid Form, the eligible format to meet the multiple bid requirement for Track A projects. Whereas contractors have unique proposal generation tools and layouts with different underlying assumptions, SOMAH's requirement of a standardized Project Bid Form harmonizes the detailed elements of a proposal into a consistent format containing objective and verifiable information. To provide the most accurate and best user experience, the PA reviews the online bidding tool weekly to engage unresponsive contractors, perform outreach to contractors with expired licenses and remove contractors with suspended licenses.

While there was no new activity with the bidding tool in the first half of 2024, several Track A projects were submitted in Q1-Q2 2024 and will likely be utilizing the tool during the next reporting period. The lower engagement volume of the bidding tool limits the amount of meaningful feedback and data available at this time. The SOMAH PA looks forward to reporting tool usage metrics and customer experience information in subsequent Semiannual Progress Reports when more data is available in aggregate.

3.1.4 Eligible SOMAH Properties Map

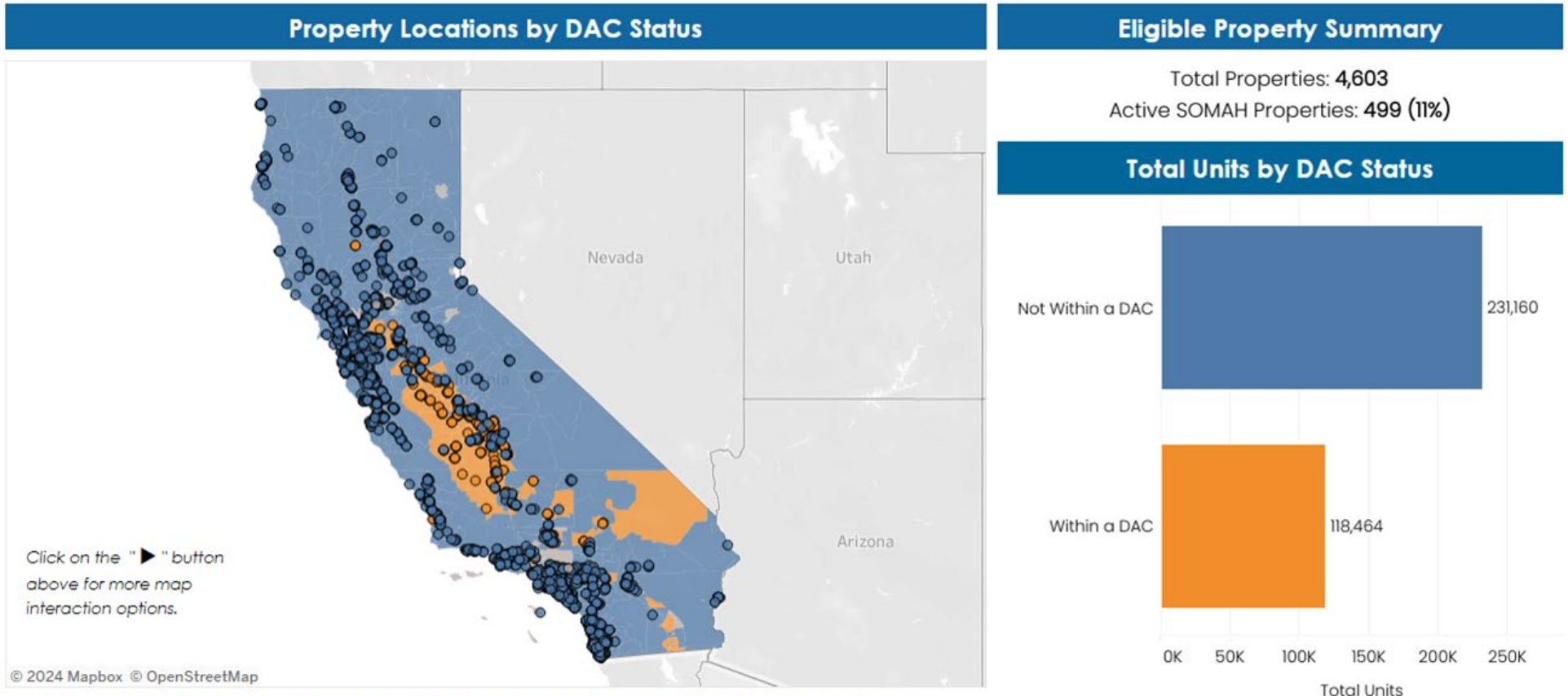
Figure 27 provides an overview of the Eligible SOMAH Properties Map. The PA focused on updates to the map during Q1-Q2 2024, including adding Tribal Ownership and Public Housing Authority filters and additional edits to the Map Information section to more accurately reflect and outline program changes. This refreshed user interface will make the map more user-friendly and streamline the access and navigation of key features and data points with the expanded program eligibility. The map webpage received over 876 page views in Q1-Q2 2024.



Map data is based on data from the California Housing Partnership's Preservation Clearinghouse, which includes HUD-subsidized properties, USDA Section 515 rural properties, properties financed with Low-Income Housing Tax Credits, and local funding sources. The map is designed for use by SOMAH participants and stakeholders, especially solar contractors. The SOMAH PA intends to update the underlying map data for potentially eligible SOMAH properties annually in the second half of each year. This year's update, completed on June 17, 2024, was due to additional data screening and scrubbing for CalEnviroScreen 4.0 properties and revised eligibility criteria at properties, and including newly eligible properties as a result of Handbook 8. The interactive visuals show multifamily affordable housing as well as current SOMAH applications, allowing users to filter by county, city, zip code, street address, SOMAH status, total units, Senate and Assembly District, main SOMAH eligibility requirements, legislative districts, and utility territories. The map provides color coding based on a property's location in CalEnviroScreen-defined disadvantaged communities, utility territories, legislative districts and climate zone.



Figure 27 – Eligible SOMAH Properties Map



The **Property Locations by [1] Disadvantaged Community Status** map displays the location of properties eligible for the SOMAH Program. The color shows details about Disadvantaged Community (DAC) Census Tracts, which are defined based on CalEnviroScreen 4.0 criteria.

This chart shows the number of affordable housing units by disadvantaged community status.



3.1.5 California Distributed Generation Statistics

The SOMAH Working Data Set, which reports on all applications received for the program across the five utility territories, is updated weekly on the California Distributed Generation Statistics [website](#). The website (previously named California Solar Statistics) has been a valuable tool for customer-sited solar projects since its inception under the auspices of the California Solar Initiative. The working data set report includes data associated with all in-process (active), completed (installed and paid), waitlisted (when applicable), withdrawn and/or cancelled projects. Reported data includes, but is not limited to, application data, contractor information, incentive amounts and solar PV system cost and technical specifications. All personally identifiable information is scrubbed from the data set to ensure customer privacy. The data set includes [two resources](#), a “Data Key” and “Read Me” PDF for download. The Data Key is a short summary of the data fields displayed in the working data set, and the Read Me includes a summary table of fields added and/or removed from the working data set, as well as the effective date, for further transparency and ease of use for stakeholders accessing the data set.

The working data set continues to be a frequently used resource for program stakeholders and participants to glean insights on program progress and trends. Program data from the working data set also populate data visualizations on the [SOMAH Statistics and Charts](#) page of the California Distributed Generation Statistics [website](#). Eleven charts and graphs are currently displayed on the page covering essential program metrics and participation statistics. With the increased activity for project completion over the past year, these charts and graphs have continued to provide valuable data highlighting the noteworthy impacts of completed SOMAH projects. In the first half of 2024, valuable edits were made to the [page](#), including adjusting the SOMAH charts and graphs, as well as modifications to the working data set to incorporate Handbook 8 program updates, fine-tuning filters and labels to reflect accurate reporting for program statics, and providing further clarity in the “Summary” and “Disclaimer” section. The SOMAH PA plans to make additional aesthetic edits to the eligible properties map in Q3 2024 to enhance user experience. Section 4, Program Planning and Development, further elaborates on additional public reporting and transparency measures of the SOMAH Program.

3.2 Marketing, Education and Outreach

As the SOMAH Program increases the number of completed projects, the PA's audience engagement has emphasized storytelling through success stories, blogs and social media posts. Activities have included planning ribbon-cuttings, in-person events and improved resources and tools. The program celebrated many successes during this reporting period, as outlined by each audience type below. ME&O efforts were guided



by the PA's 2024 ME&O Plan and focused on: 1) outreach to property owners and federally recognized tribes; 2) efforts to increase applications by new contractors and subcontractor participation; 3) providing job trainee opportunities and promoting job trainee participation; 4) increasing in-person tenant education workshops; and 5) increasing stakeholder co-marketing partnerships.

3.2.1 ME&O Plan

SOMAH's annual Marketing, Education and Outreach Plan (ME&O Plan) guides the program's marketing, education and outreach activities, setting goals, objectives and tactics to reach SOMAH's priority audiences and supporting the overall program goals for 2024. The ME&O Plan uses outreach tactics to increase application submissions (Goals 1, 2 and 5) and to spread equitable sustainability for low-income and underserved communities (Goals 3 and 4).

The 2024 ME&O Plan used the 2023 SOMAH Second Triennial Report recommendations, previous SOMAH-led surveys and focus group evaluations to address outreach gaps per audience. The SOMAH PA finalized the 2024 ME&O Plan in February 2024 after a public comment period. The 2024 ME&O Plan is posted annually on the CPUC's California Distributed Generation Statistics [webpage](#).

SOMAH's 2024 ME&O Goals

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

Goal 2: Retain a robust and diverse contractor base and support eligible contractor participation with new application submissions.

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

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

Goal 5: Ensure stakeholders are informed and actively co-marketing the program.

Though the 2024 ME&O Plan's primary goals remain the same as last year's, outreach strategies are continually refined to increase engagement.

3.2.2 Monitoring, Evaluation and Research

The SOMAH PA uses mixed methods to monitor and evaluate ME&O efforts, including surveys, qualitative interviews, program data analysis, reporting and transparency



activities. Research efforts are determined by the PA based on the program implementation plan, handbook, annual ME&O plans and other ongoing needs. The objectives of SOMAH Program participant research are:

- Understand audiences' motivations for program participation and barriers they may face to participating.
- Gauge program participants' overall satisfaction with SOMAH.
- Determine program participants' willingness to continue participating and recommend SOMAH to others.

Surveys are issued to all SOMAH audiences at various stages, from ME&O outreach efforts, through the application, to post-application. Feedback from surveys of SOMAH key audiences is used to inform ongoing ME&O outreach efforts and the application process. See Figure 28 for a summary of planned and completed surveys. Some surveys previously reported on have been removed to showcase the most relevant and recent program activities. In addition to surveys, the SOMAH PA began conducting future-focused research. This research is designed to: 1) identify opportunities to increase diverse contractor participation in SOMAH as prime or subcontractors; 2) spot opportunities to increase overall property owner participation; 3) evaluate program retention; and 4) understand the market for SOMAH. These research projects are outlined below.

Figure 28 – Completed and Planned Surveys by Category

Audience	Survey Name	Milestone/ Timeline	Launch Date	Frequency
Contractors	Job Trainee Performance Survey	Post-project installation	Launched Q3-Q4 2021	Ongoing post-installation
Contractors	Job Trainee Employed Survey	Post-project installation	Launched Q3-Q4 2021	Ongoing: 3, 6 and 9 months after reported trainee hiring
Contractors	Contractor Workforce Survey	As available	Launched Q2-Q4 2023	One-time administration
Property Owners	Technical Assistance (TA)	Post-TA, pre-preservation request	Launched Q4 2021	Ongoing post-TA
Tenants	Tenant Education	Post-project installation	Launched Q1 2022	Ongoing post-installation
Job Trainees	Job Trainee Experience Survey	Post-project installation	Q1-Q2 2022	Ongoing post-installation



ME&O Program Research

SOMAH's research projects in 2023-2024 are outlined in Figure 29. During Q3 2021, the PA created a research plan to better understand the program's participants, audiences and successful projects. This plan is routinely updated as focus and priorities change and research continues in 2024. In addition to participant research, the PA has conducted a deeper dive into eligible properties to better understand the market for SOMAH properties. Previous research projects included Contractor Focus Groups, Property Owner Pipeline Analysis, Subcontractor Interviews, Tenant Education Focus Groups, and Building Inventory Analysis. Please refer to prior Semiannual Progress Reports for further information on research projects before 2023.

Figure 29 – SOMAH 2023-24 Program Research

Project Descriptions	Research Objectives	Audience	Timeline
Contractor Market Research	<ul style="list-style-type: none"> Investigate the number of larger-scale solar contractors working in and around CA who may be good candidates to engage with the program. 	SOMAH PA	Q4 2023
Liberty Utilities and PacifiCorp Contractor Analysis	<ul style="list-style-type: none"> Map how many licensed solar contractors are in or within close proximity to Liberty Utilities and PacifiCorp service territories to target outreach efforts. 	SOMAH PA	Q4 2023
Eligible Contractor Outreach and Interviews	<ul style="list-style-type: none"> Engage contractors to determine their 2024 SOMAH participation plans. Understand barriers to participation and gaps in knowledge about SOMAH resources that preclude participation. Determine challenges contractors face in submitting applications and how the SOMAH PA can facilitate. 	SOMAH PA	Q2-Q3 2024

Contractor Market Research

The purpose of this research was to investigate the number of larger-scale solar contractors working in and around CA who may be good candidates to engage with the program. The PA did this to support targeted outreach and recruitment of potential solar contractors who have the size and scope to contribute multiple projects to SOMAH. The PA merged lists of the California Contractors State License Board, the Multifamily Affordable Solar Housing (MASH) Program, SOMAH contractor outreach lists



and lists of the state's Top 100 solar contractors based on system capacity installed. These lists were then narrowed down to a list of 15 contractors that could be targeted for engagement or re-engagement with the program. Findings showed that the SOMAH PA has identified and engaged the biggest solar contractors with the capacity to participate, however not all of these larger contractors have been participating. See the Eligible Contractor Outreach and Interview section for follow-up research related to this finding.

Liberty Utilities and PacifiCorp Contractor Analysis

The purpose of this research was to identify how many licensed solar contractors are in or within close proximity to Liberty Utilities and PacifiCorp service territories to target outreach efforts. Properties within these two service territories have yet to meaningfully engage with the SOMAH Program. Using data from SOMAH's partners at the California Housing Partnership Corporation, as well as data from the California Contractors State License Board, the PA identified six possible contractors within a 50-mile radius of the main cluster of likely SOMAH-eligible properties in Liberty Utilities' service territory. In addition, the PA identified 10 possible contractors within a 50-mile radius of the main cluster of likely SOMAH-eligible properties in the PacifiCorp service territory. Specifically in PacifiCorp's service territory, there were two main clusters of likely SOMAH-eligible properties, so the PA provided two maps specific to each cluster.

Eligible Contractor Outreach and Interviews

During this reporting period, the SOMAH PA conducted research to target specific contractors for outreach to determine if they plan to participate in SOMAH. Once a response was received, the SOMAH PA used conversational interviews to explore barriers and gaps in program resources and knowledge that may be precluding their participation. Additionally, the interviews explored challenges contractors may be having in applying and what the SOMAH PA can do to facilitate and encourage their application submissions. Interviews were conducted by the SOMAH PA in Q1-Q2 2024. Results are being analyzed and will be reported in the next progress report.

3.2.3 Contractors

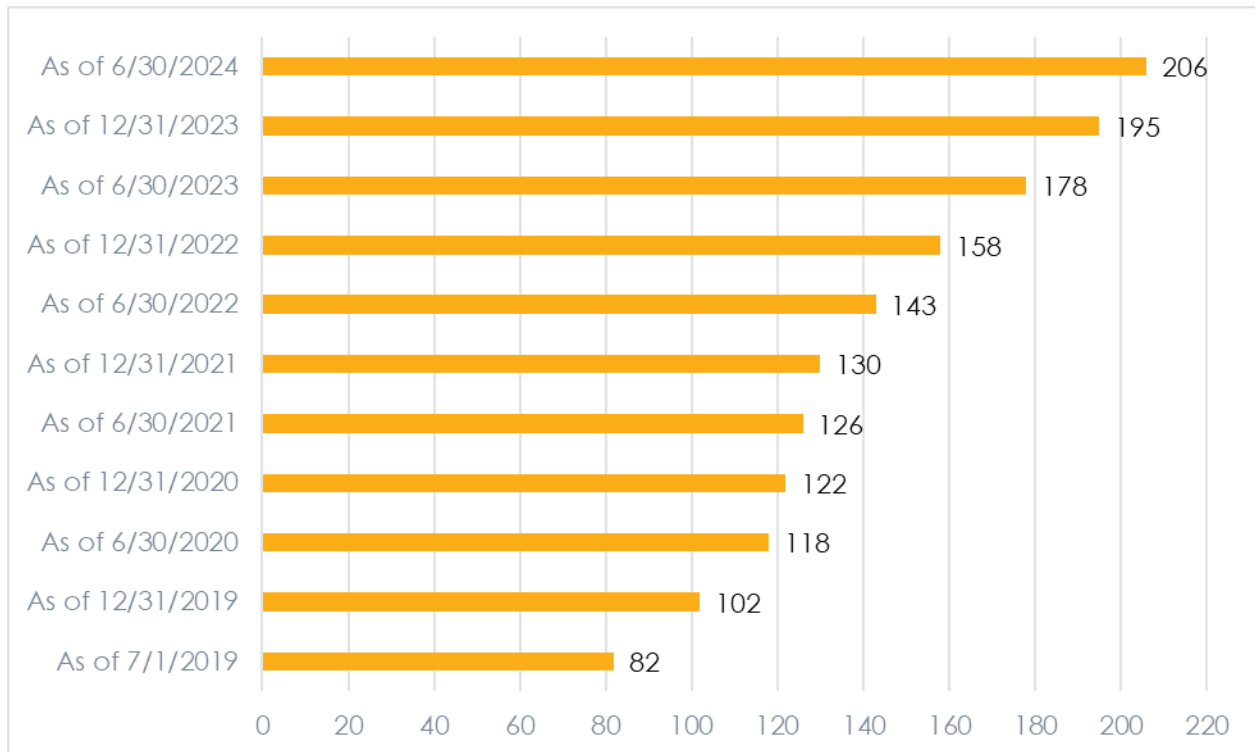
The SOMAH PA engages with active SOMAH contractors through the Track B application pathway and with prospective contractors through direct outreach and webinars. During this reporting period, the SOMAH PA continued to focus contractor outreach efforts on direct outreach, digital channels and virtual events.

The PA continues to engage contractors through ongoing bimonthly Applicant and Contractor Eligibility Trainings. During this reporting period, eligibility training sessions were held in January and April 2024. The applicant and contractor training sessions had



a total of 54 attendees out of 89 registrants. Attendees included new contractor companies, new staff members for already eligible contractors and representatives from energy efficiency agencies. Training session promotion included several social media posts on SOMAH's Facebook, LinkedIn and X (formerly Twitter) channels. At the close of this reporting period, there were a total of 206 SOMAH-eligible contractors, as shown in Figure 30.

Figure 30 – Number of Eligible Contractors Over Time



This reporting period, there were 16 new SOMAH-eligible contractors and 10 new subcontractors. Of these new contractors, three primary contractors are in the Central Valley. The Central Valley, PacifiCorp and Liberty Utilities are geographic regions with low application submissions. In 2023, the PA conducted contractor research of larger nonparticipating contractor companies throughout California that have not completed the SOMAH contractor eligibility process and looked specifically at Liberty Utilities and PacifiCorp service territories. Direct contact with these nonparticipating contractors will be initiated in the second half of 2024, as mentioned in section 3.2.2 Monitoring, Evaluation and Research. This outreach will focus on helping ineligible contractors become eligible.

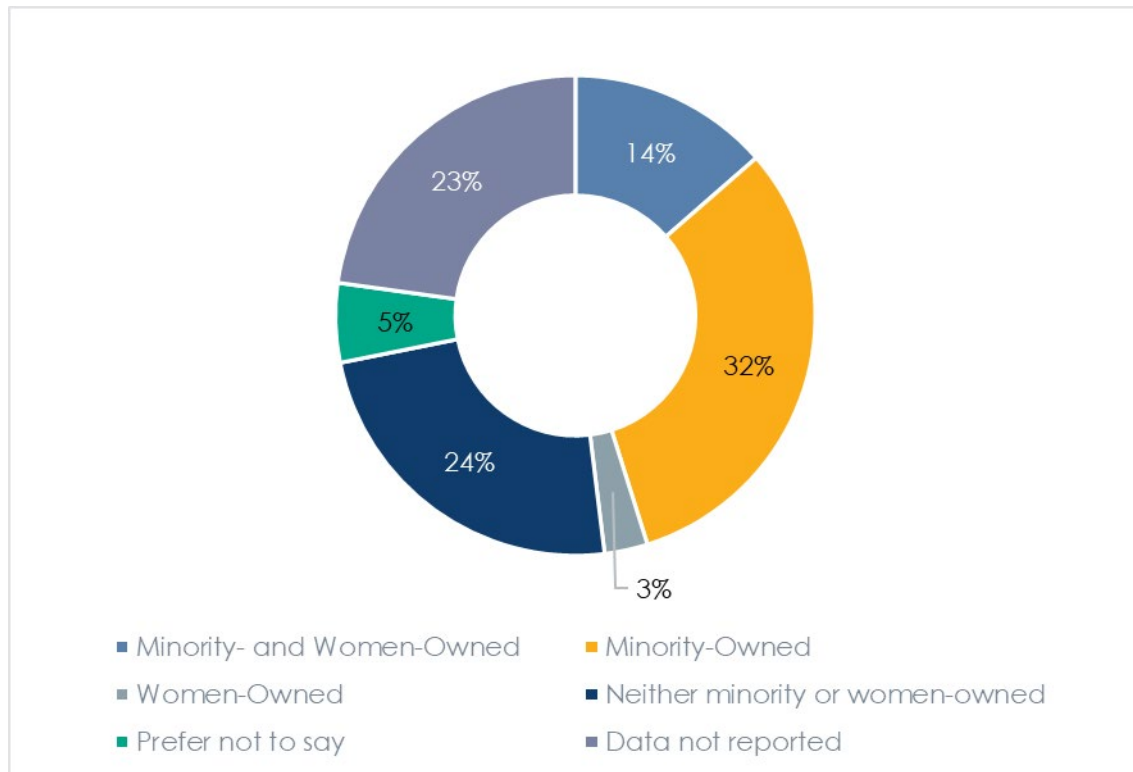
Two applicant and contractor office hour webinars were offered during this reporting period. Office hour webinars were started in 2023 to address topics contractors had



expressed difficulty in understanding and provide an open forum for questions. This year, SOMAH covered Handbook 8 changes in March as well as Technical Assistance and Support Services in June. The two webinars had a combined registration of 46 with 18 attendees. SOMAH will hold one more office hour webinar in Q3 2024 about lead generation to help contractors navigate SOMAH resources to increase contractor application submissions by nonparticipating SOMAH-eligible contractors.

The SOMAH PA also attended one in-person event this reporting period. A PA member was a panelist at the 2024 Intersolar and Energy Storage North America Conference in San Diego. The panel, *Expanding Access to Solar: Exploring New Market Opportunities*, discussed the benefits of bringing solar to low-income households and multifamily properties.

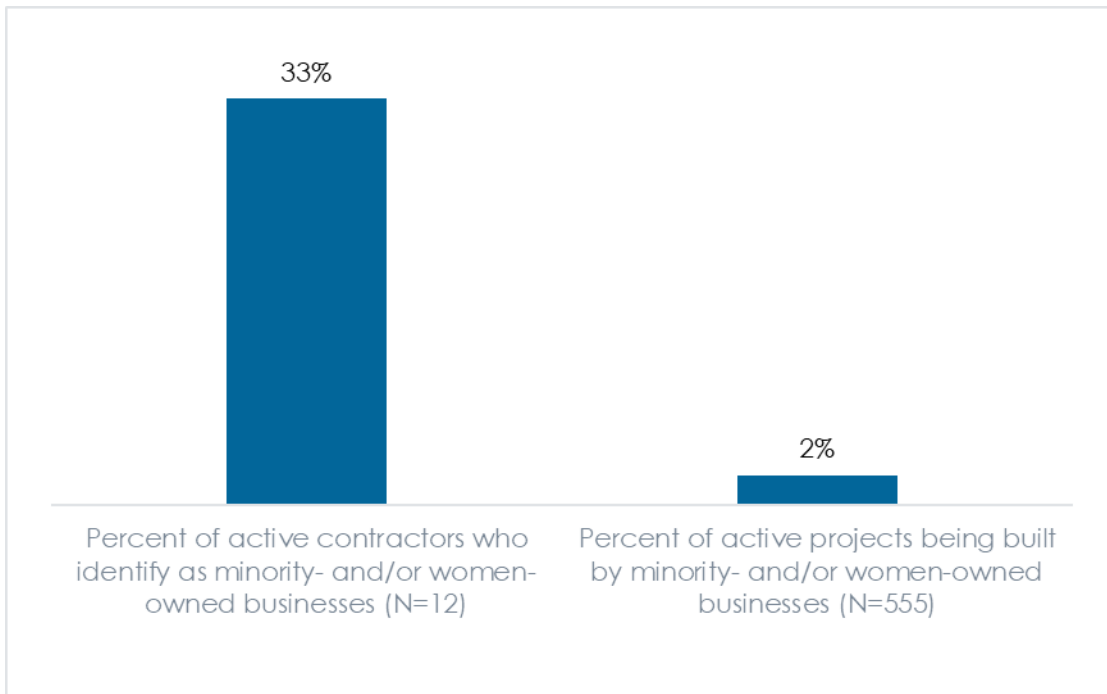
Figure 31 – Eligible Contractor Statistics



N = 206

SOMAH continues to strive to increase participation by diverse contractors, defined by SOMAH as minority, women and/or LGBTQIA+-owned companies, as well as small companies with fewer than 25 employees. Out of the total 206 SOMAH eligible contractors, 141 identified as small companies. Of the 16 new contractors this reporting period, eight identified as minority-owned and three identified as woman-owned.

Figure 32 – Active Contractor Diversity



In 2024, the SOMAH PA approved one additional power purchase agreement (PPA) provider interested in pairing with contractors and subcontractors on SOMAH projects. A PPA Providers page on the SOMAH website provides the names and contact information of pre-approved PPA companies. SOMAH PPA providers were featured in the June 2024 SOMAH Scoop newsletter. The PA continues to do outreach and meet with new providers to increase the number of providers in the program. This pairing will help with overcoming financial burdens and limitations with ownership options that smaller contractors have listed as a barrier to participating in SOMAH.

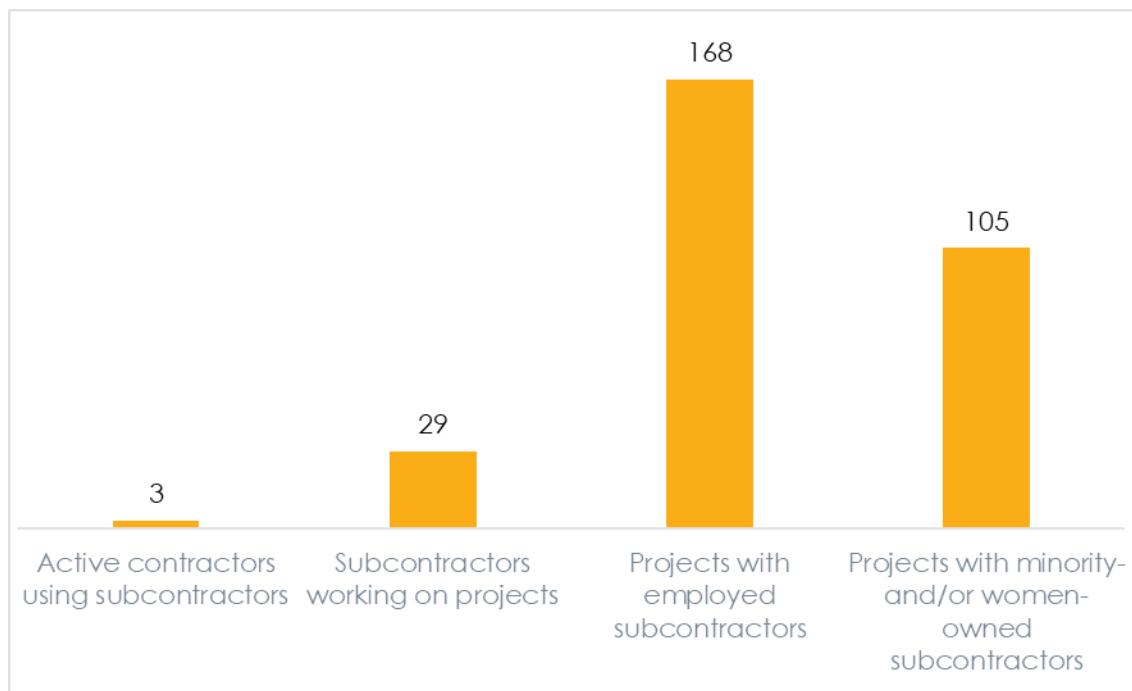
This reporting period had 10 new subcontractors on SOMAH projects. Increases in project completions have helped increase subcontractor participation reporting as prime contractors manage the application process and, or, financial side of SOMAH projects, such as in power purchase agreements.

Once a project has reached completion, the SOMAH PA receives information about subcontractors used at SOMAH projects. Over the past year, the PA has witnessed an increase in reporting of subcontractor use overall. As highlighted in the 2023 SOMAH Second Triennial Report, subcontractors are increasing overall contractor diversity despite a lack of diversity of prime contractors because the subcontractors are often



diverse businesses.²³ Additionally, the SOMAH PA conducted subcontractor interviews in Q3-Q4 2022 that provided further insights and information on the relationships between primary and subcontractors as well as their roles and overall engagement in the program. The subcontractor information collected from the application process also provides insights into the diversity of contractors engaging in and benefiting from the SOMAH Program. Currently, three contractors are using subcontractors on 167 different projects. In total, there are 32 separate subcontracting companies working in support of completing SOMAH projects.

Figure 33 – Subcontractor Statistics



The 2023 Triennial SOMAH Evaluation Report had many affirmations for current outreach efforts and insights on contractor needs and perspectives on the program. Per the recommendations, the PA has increased outreach efforts in 2024 to nonparticipating contractors, added resources to help with application submissions, added the Progress Payment Pathway to the contractor email nurture campaign and will continue to use expanded eligibility from Handbook 8 changes to reengage nonparticipating contractors.

²³ Diverse businesses are small (i.e., < 25 employees) or underrepresented-owned businesses.



3.2.4 Property Owners

Both in-person and digital outreach approaches have been conducted with property owners. Primary channels of engagement were direct email outreach, interest calls, email announcements through the CalSOMAH listserv, webinars, conferences, social media, paid media campaigns and video content.

Direct Email Outreach

During this reporting period, direct emails were sent to 377 property owner organizations/companies (property management companies or PMCs) including 52 housing authorities and 58 tribal entities. These companies represent a large portion of the total number of eligible properties, as a single PMC can have numerous SOMAH-eligible properties in its portfolio. Direct outreach emails were sent to invite property owners to webinars and events, highlight prospective SOMAH projects, provide information on how to request Technical Assistance Preview reports, offer one-on-one portfolio reviews with a SOMAH PA member and introduce the SOMAH Program through a PowerPoint overview of the program, eligibility requirements and available incentives.

A specific focus of direct outreach during this reporting period was information sharing for SOMAH's expanded eligibility requirements by targeting prospective property owners who may have previously been ineligible and/or may have had complications enrolling in SOMAH due to previous eligibility barriers. Examples include public housing authorities, tribal entities and properties with higher income thresholds. To engage these property owners, the PA initiated multiple outreach campaigns to ensure that property owners had various communication touchpoints with SOMAH. Twenty-four Technical Assistance Preview reports have been compiled and sent to property owners to provide them with key information to consider before getting started with a SOMAH project. The reports emphasize the financial aspects of projects, a main topic of interest for property owners. The SOMAH PA intends to continue outreach efforts throughout the year to actively target properties that may more easily qualify for SOMAH through the expanded eligibility pathways. Planned activities include identifying co-marketing partners that serve public housing authorities and tribes, as well as continuing to disseminate direct outreach emails.

Additionally, the SOMAH PA is focusing outreach efforts on re-engaging applicants and property owners with cancelled applications. The PA is focusing on direct outreach to individuals whose applications were cancelled due to their projects not meeting eligibility requirements. Email communication focuses on the updated eligibility



requirements along with an offering to meet with the SOMAH PA to conduct a portfolio review to determine which properties may be eligible to receive SOMAH incentives.

Tribal Outreach

One of the SOMAH PA's goals is to increase participation among tribal entities. During this reporting period, the SOMAH PA completed two interest calls with tribal property owners or leaders, providing portfolio reviews, a brief overview of the SOMAH Program and a Q&A session. Connecting with tribal property owners will continue to be a priority throughout 2024.

The SOMAH PA is focused on engaging tribal entities and increasing the number of applications on tribal lands. This reporting period, the SOMAH PA has emphasized connecting with tribal liaisons across each of the IOU territories. Over Q1-Q2, members of the PA met with tribal liaisons from the PG&E, SCE, and PacifiCorp territories. With help from the IOU tribal liaisons, the SOMAH PA has engaged a greater number of tribes across California through direct referrals and co-marketing activities. Activities suggested by the liaisons that the SOMAH PA has executed include adding more tribes to the listserv, communication via newsletter, and direct email referrals from the liaisons to tribal members. The PA intends to continue collaboration efforts with IOU tribal liaisons to ensure tribal communities are informed of the availability of technical assistance and SOMAH incentives.

As reaffirmed by the 2023 Triennial SOMAH Evaluation Report, the SOMAH PA increased outreach to both federally and non-federally recognized tribes using a list of 180 tribes from the Native American Heritage Commission. With this list, the SOMAH PA has been able to focus on specific IOU territories determined to have the highest potential for likely SOMAH-eligible properties and streamline outreach efforts. The first quarter was focused on tribes in SDG&E territory and Q2 on the SCE and Liberty Utilities service territories.

The SOMAH PA hosted one webinar in Q2. Called *Making Solar Easy with SOMAH's Technical Assistance Services*, the webinar gave a basic overview of the SOMAH Program, then went into greater depth on what technical assistance services can be accessed by property owners and applicants as well as a case study on St. Mary's Garden, a successful SOMAH project in the Bay Area. In total, five attendees joined the webinar, which led to one Track A application submission. This application initially used the TA and Support Services request form and then submitted an affordability prescreen request. The applicant also plans to use partner programs, the Low-Income Weatherization Program and the Bay Area Multifamily Building Enhancements Program. The webinar slide deck and recording were also disseminated in the June 2024 SOMAH Scoop newsletter and are accessible on the SOMAH YouTube channel.



Property Owner Outreach Events

- Housing California 2024 Conference (March 6-8, 2024)
- Presentation for the City of Santa Ana in partnership with The Kennedy Commission (April 25, 2024)
- Community Environmental Council Incentive Program Mixer (June 28, 2024)

Website, Social Media & Digital Marketing

The SOMAH website and social media channels serve as additional channels for digital marketing and engagement with the property owner audience. The main property owner's webpages on the SOMAH website performed well during this period with 1,974 page views. New [resources](#) for property owner have been added continually to the website, including success stories, video testimonials and application tutorials. This reporting period, the [Check Eligibility Form](#) on the SOMAH homepage had 53 total submissions. Once submitted, the SOMAH PA reaches out to schedule an interest call and discuss program eligibility, incentives and benefits. This period, 36 interest forms were submitted by property owners. The SOMAH PA will continue these engagement efforts and coordination of interest calls, which provide a deeper look into property eligibility before a prescreen or Technical Assistance Preview Report request is submitted.

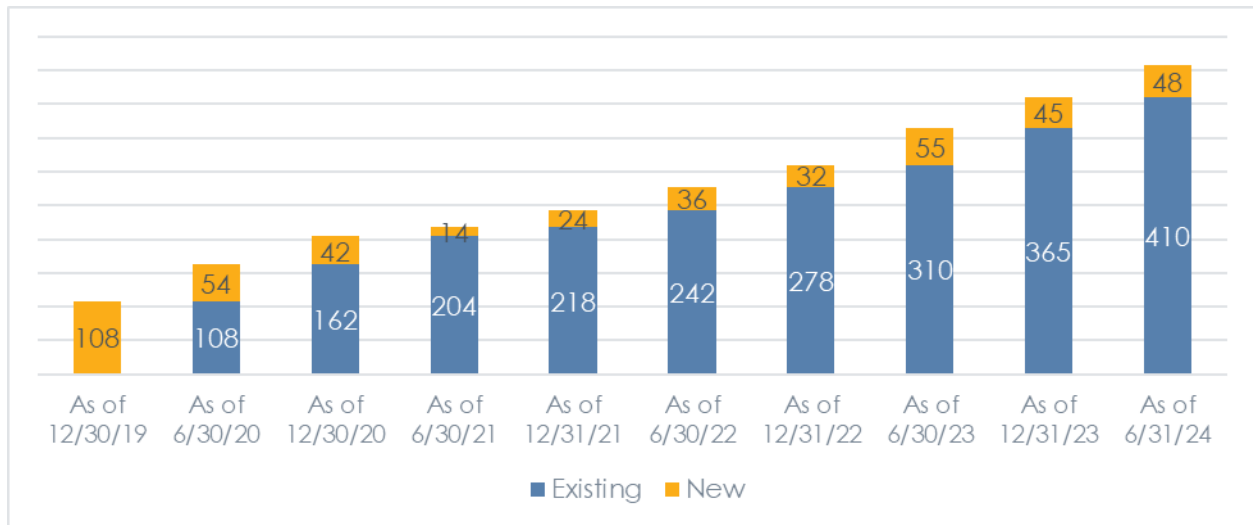
In Q2 2024, the SOMAH PA had a tribal paid digital and magazine marketing campaign via two tribal news outlets, Tribal Business News (digital, email and magazine) and Native News Online. The online campaigns generated 30,999 impressions and 1,018 clicks.²⁴ The campaign integrated an interest form sign-up sheet on a landing page, which prompted users to provide contact information. The SOMAH PA received one interest inquiry which led to an interest call.

The CalSOMAH [email listserv](#) provides important program updates, including funding announcements, program changes and alerts about upcoming events and webinars. The listserv increased by 46 additional property owners plus two tribal members during this reporting period, including one tribal subscriber attained while the tribal paid marketing campaign was deployed.

²⁴ An impression means a platform user saw the ad, while a click is a user who interacted with the ad. When the ad was clicked, the user was sent to the SOMAH website to review content specified in the ad.



Figure 34 – Property Owner Subscribers Over Time



3.2.5 Tenants

The primary objective of tenant education is to ensure residents of potentially eligible SOMAH buildings and those living in buildings participating in SOMAH are aware of and able to benefit from SOMAH in an equitable manner.

Tenant Education Services

The SOMAH PA continues to promote its Tenant Education Services through quarterly tenant education trainings and webinars, including the Applicant and Contractor Eligibility Trainings and public forums. As an essential tool for tenants, the SOMAH PA has prioritized promoting the Tenant Education Hotline, specifically focusing on the hotline in workshops and training sessions. In Q1-Q2 2024 the SOMAH PA received 17 phone calls to the tenant hotline from 16 unique callers. Seven of these callers had questions about interconnection timelines and the utility bill breakdown. Several calls and inquiries from tenants and the property manager resulted in two on-site continued tenant education workshops to address concerns about utility bills such as clarifying bill credit expectations and reviewing cost analysis.

For this reporting period, there were eight in-person tenant education workshops at four properties. These workshops were in Southern California, Inland Empire, and Bay Area regions and were facilitated in the following locations: Lexington Green in El Cajon, Emerald Cove in Huntington Beach, Loma Sierra in Loma Linda, and Gleason Park in Stockton. Three main languages were requested: English, Spanish and Arabic. Interpreters for Spanish and Arabic were hired to facilitate on-site translation as needed.



The SOMAH PA also continues to review affidavits to make sure the tenant education requirement is being met. In Q1-Q2 2024, 109 projects submitted tenant education affidavits and reached the designated milestones (e.g., Proof of Project, Incentive Claim). These projects accomplished the tenant education requirements by completing both the first and second outreach touchpoints.

The SOMAH PA is conducting data analysis of surveys to inform tenant education requirement changes and the revision of the Tenant Education Toolkit and Tenant Education Services in 2024. There is a consensus to reorganize the tenant education materials and deliver them pre- and post-installation. One consistent theme highlighted the need to simplify the materials, with a focus on frequently asked questions. There is also a need to simplify the SOMAH PA's contact information so that tenants can more easily navigate to the tenant hotline for answers. Based on tenant surveys, tenants have either achieved optimal awareness/comprehension of the materials or are left feeling confused and overwhelmed. Additionally, CBO feedback suggested simplifying key points and clearly outlining the tenants' utility bill information, based on region, so that tenants understand their cost analysis.

The SOMAH PA proposed updating the tenant education requirements to increase the effectiveness of tenant education, based on survey responses and third-party evaluation findings, in May 2023 through the CPUC's Administrative Law Judge (ALJ) ruling inviting comments on potential modifications to SOMAH (see Q1-Q2 2023 SAPR for details). The SOMAH PA is awaiting a response and will explore proposed updated tenant education requirements in a future handbook update.

Interconnection Impacts on Tenants

As more SOMAH projects complete and interconnect with the IOUs, more tenants are becoming aware of the solar projects at their properties and how they will benefit. In Q1-Q2 2024, seven of the 19 calls to the Tenant Education Hotline were from tenants inquiring about the completed solar project at their property and when to expect bill credits. With more completed projects, SOMAH is actively tracking the amount of time needed for projects to receive interconnection and the time from interconnection to receipt of bill credits. Tracking these timelines is especially important from a tenant perspective. SOMAH aims to provide accurate details to tenants as well as work with the IOUs to reduce extended timelines. Tenants remain a central pillar of SOMAH and the economic relief SOMAH aims to provide to the tenants is delayed when there are extended timelines for tenants to receive bill credits. SOMAH continues to work with the IOUs to understand the interconnection processes and escalate extended timelines to the CPUC to reduce tenant impact.



3.2.6 Stakeholders

Stakeholder outreach is an important part of the SOMAH Program's ME&O efforts. SOMAH stakeholders include local government offices, elected officials, IOUs, CCAs, regional energy networks (RENs) and California energy efficiency program administrators. Building and maintaining partnerships with these stakeholders strengthens the credibility of the SOMAH Program and helps ensure the program reaches target audiences across the state. The goals of stakeholder outreach are to spread awareness of the SOMAH Program and encourage actions such as co-marketing efforts to reach potential participants and ultimately generate new projects.

The SOMAH PA engaged in activities across these two focuses, including collaborating with energy efficiency programs through RENs and the IOUs, speaking at stakeholder-led events and webinars and developing co-marketing materials. The following sections summarize the PA's accomplishments in Q1-Q2 2024.

IOUs, CCAs and RENs

Throughout this reporting period, the SOMAH PA maintained collaboration with the IOUs — Liberty Utilities, PacificCorp, PG&E, SCE and SDG&E. The SOMAH PA met quarterly with representatives of PG&E, SDG&E and SCE's Single Point of Contact (SPOC) services and the new statewide Multifamily Energy Savings program (MFES), which launched in July 2023. To raise awareness of this program, updated information has been added to the SOMAH website for co-marketing. The PA focused the first half of the year on addressing co-enrollment of SOMAH projects in the MFES program, working closely to ensure alignment of the two programs and develop co-enrollment pathways. The PA plans to develop program co-enrollment guidelines, specifically how enrollment in the MFES program applies to SOMAH's Energy Efficiency Compliance Milestone, by Q4 2024.

During Q1-Q2, SOMAH's IOU partners co-promoted the program on several separate occasions. In the PG&E territory, SOMAH was featured in both the PG&E contractor newsletter as well as the PG&E property owner newsletter. In SCE's territory, SCE published a customer facing article highlighting SOMAH's Coyote Mountain Apartments project, the first tribal project to receive a SOMAH incentive. Co-marketing the program has helped spread program awareness to customers of participating IOUs. Finally, PG&E, PacificCorp and SCE connected the SOMAH PA to IOU tribal liaisons for co-marketing opportunities.



Local Governments and Elected Officials

During this reporting period, SOMAH created a variety of new partnerships with local governments and elected officials. The PA met with the City of Thousand Oaks and the Monterey Bay Council of Governments which led to connections with their respective housing authorities. The PA also participated in two in-person presentations. A presentation at the Inland Regional Energy Network (I-REN) Executive Committee meeting in Riverside led to a connection with the Coachella Valley Association of Governments (CVAG). The PA also presented at a CBO event led by Community Environmental Council in Santa Barbara where contractors and property owners were present, including the Housing Authority of Ventura, which has a portfolio of likely eligible properties. The SOMAH PA continues efforts to prioritize fostering relationships and participation in communities with lower engagement in the program. As a part of this effort, the PA plans to do direct outreach to local government offices in Q3-Q4 2024, with the goal of sharing the program's newly expanded eligibility pathways and connecting with newly eligible properties across the state.

3.3 Workforce Development

A primary goal of the SOMAH Program is to promote economic development in low-income and underserved communities through paid job training opportunities, emphasizing local and targeted hiring of individuals who experience barriers to entering the solar workforce. The SOMAH PA continues to reach this goal by:

- Conducting targeted outreach to job training organizations (JTOs) across the state to engage prospective job trainees.
- Empowering SOMAH's CBO partners with tools and resources to connect local job seekers to training opportunities.
- Engaging tenants of SOMAH properties to take advantage of SOMAH job training opportunities.
- Organizing career development workshops and resources for job trainees to promote awareness of job training opportunities and address barriers to employment.
- Supporting contractors with trainee recruitment and workforce development to augment participation in SOMAH and ensure requirements are met efficiently.
- Gathering feedback from SOMAH's Job Training Organization Task Force.

Job Training Organization Outreach & Job Trainee Engagement

The current SOMAH application pipeline is projected to create 1,000 job training opportunities and 63,040 trainee hours. To broaden SOMAH's pool of eligible job trainees, the SOMAH PA continued to contact and vet JTOs that serve targeted



trainees and geographic regions where there is lower JTO engagement, including Northern California, Central Valley and Central Coast. The SOMAH PA also continues to focus outreach to JTOs that serve priority populations, such as justice system-impacted individuals, trainees residing in rural areas and tribal communities.

During Q1-Q2 2024 there were 95 active JTOs in the JTO Directory. In this reporting period, the SOMAH PA prioritized existing JTO partnerships and focused on bolstering the HeatSpring SOMAH Academy program. Thirteen new job trainees were added to the SOMAH Job Training Portal for 529 job trainees engaged on the portal.

The SOMAH PA also worked with CBO partners to inform their local communities about SOMAH's job training opportunities and foster local JTO connections. The SOMAH PA is increasing tenant participation in job training opportunities by promoting them through Tenant Education Services. The SOMAH PA continues to engage with job trainees and solar job seekers by facilitating career development workshops.

In 2024, the SOMAH PA worked with a CBO partner, Communities for a Better Environment (CBE), to launch a pilot program where members of the CBE community completed all courses in the HeatSpring SOMAH Academy as a cohort, receiving a stipend and a completion certificate. Thirty-two community members attended the initial presentations on SOMAH job training opportunities and the pilot program. Out of those 32, four went on to participate in the program, which offered a mix of in-person sessions at CBE's south Los Angeles office and self-guided online coursework. The HeatSpring SOMAH Academy is a curated list of free self-study courses that provide a broad overview of the solar industry. Once all the courses are completed, a trainee meets eligibility requirements and can apply for a paid job training opportunity.

The SOMAH PA is in the process of developing a resources page on the Job Training Portal that will include a directory of local supportive services where job seekers can access support for transportation, resume building and other barriers to employment.

Contractor Job Training Support

The SOMAH PA supports participating contractors in meeting job training requirements by connecting local job seekers and job trainees from the Job Training Portal to contractors with upcoming installation projects. In 2024, the SOMAH PA facilitated 15 requests for support with job training from SOMAH contractors. As a result of this support, 100% of SOMAH projects that submitted the Job Training Affidavit with the Incentive Claim Milestone met all job training requirements.

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



March and June 2024, the SOMAH PA hosted Job Training Overview webinars for contractors that detailed SOMAH's job training requirements and the program's workforce development resources and services. Contractors received a live demonstration of the Job Training Portal and how it can be leveraged to help meet their job training requirements.

A workforce needs assessment was administered in 2023 to evaluate the hiring, training and job training requirements of SOMAH-eligible solar contractors. The objective of the assessment was to learn how the SOMAH PA could better help contractors comply with SOMAH's job training requirements, stay competitive in the solar industry and improve their experience with the program. The assessment targeted three categories of solar contractors engaged with the program:

1. **Primary Contractors:** Contractors who have completed SOMAH projects or are in the process of completing a SOMAH project.
2. **Subcontractors:** Contractors who have completed SOMAH projects or are in the process of completing a SOMAH project as listed subcontractors.
3. **Eligible Contractors:** Contractors identified as potential project applicants to receive SOMAH incentives.

Participants from each group responded to a comprehensive 92-question assessment. Out of the 46 surveys administered, 41 were completed, resulting in an 89% completion rate. Results are being analyzed and shared with stakeholders. The PA plans to share the results and analysis in the next SAPR. The workforce development team will continue to share key findings with program stakeholders to gather additional feedback and enhance strategies to engage contractors throughout 2024.

3.3.1 Local Hiring and Job Training Data

During this reporting period, the SOMAH PA received four Job Training Affidavits from projects that reached the Incentive Claim Milestone for 118 projects that submitted affidavits. The Job Training Affidavits report 105 job trainees hired to work on SOMAH projects for 221 job training opportunities. Many trainees worked on multiple SOMAH projects, gaining valuable hands-on experience and solar installation skills. The SOMAH PA collected demographic information on 55 of the 105 hired job trainees (shown below). Data on job trainee advancement (i.e., the number of SOMAH trainees who become full-time solar employees) and retention is collected through surveys to contractors after each project reaches the Incentive Claim Milestone. To date, the SOMAH PA has received 566 job training surveys, with 18 job trainees reported as hired by contractors for continued employment.

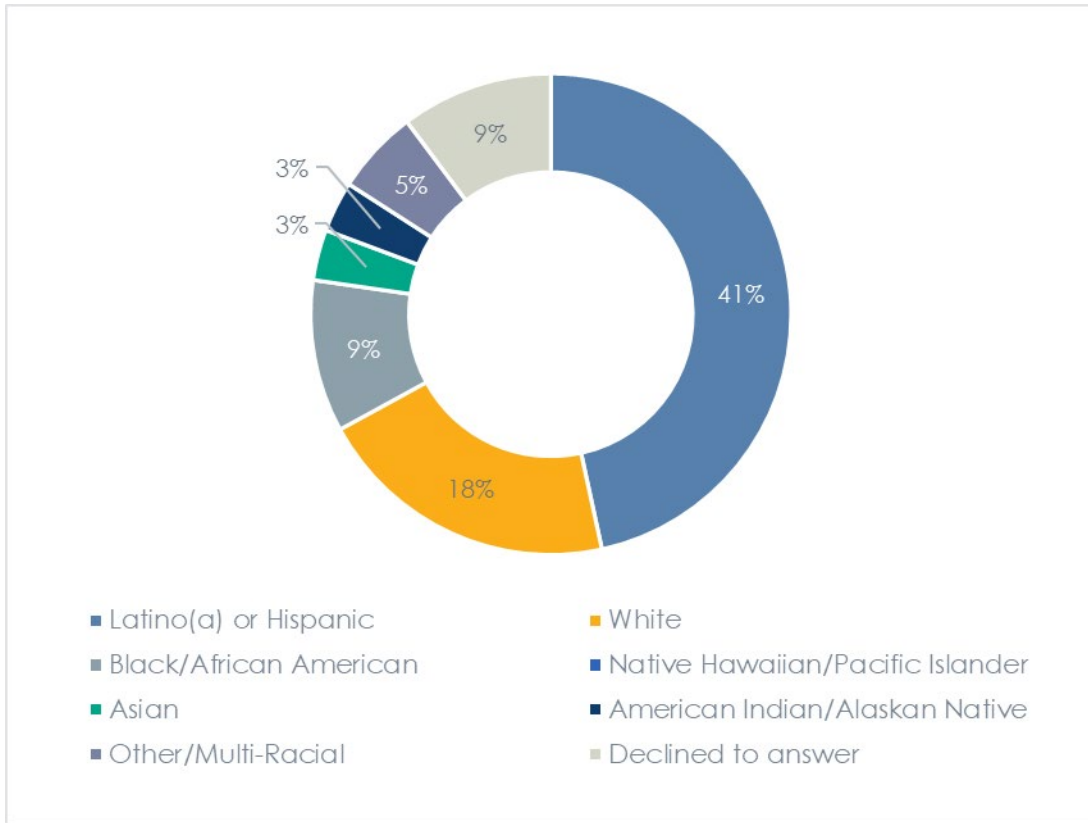


Local & Targeted Hires

- 49% of job trainees reside in DACs.
- 41% of job trainees were local hires (live in the same county as the SOMAH project).
- 80% of trainees were hired on a temporary basis while 20% were permanent hires.
- 71% of job trainees were targeted hires.
- 91% of trainees worked on direct PV installation.
- 7% of trainees worked on post-installation operations and maintenance.
- 2% of trainees worked on pre-installation design and engineering.
- 36% reported as unemployed or underemployed at the time of SOMAH intake.
- 17 tenants of SOMAH properties participated as job trainees.
- 17 job training organizations have students or graduates who have participated in SOMAH job training opportunities.
- \$20.97: average trainee hourly wage.
- 84.95: Average training hours per project per trainee.

The SOMAH PA collected demographic information on 55 of the 105 hired job trainees through the Job Trainee Intake Form. Figures 35-36 depict findings from the analysis of this data.

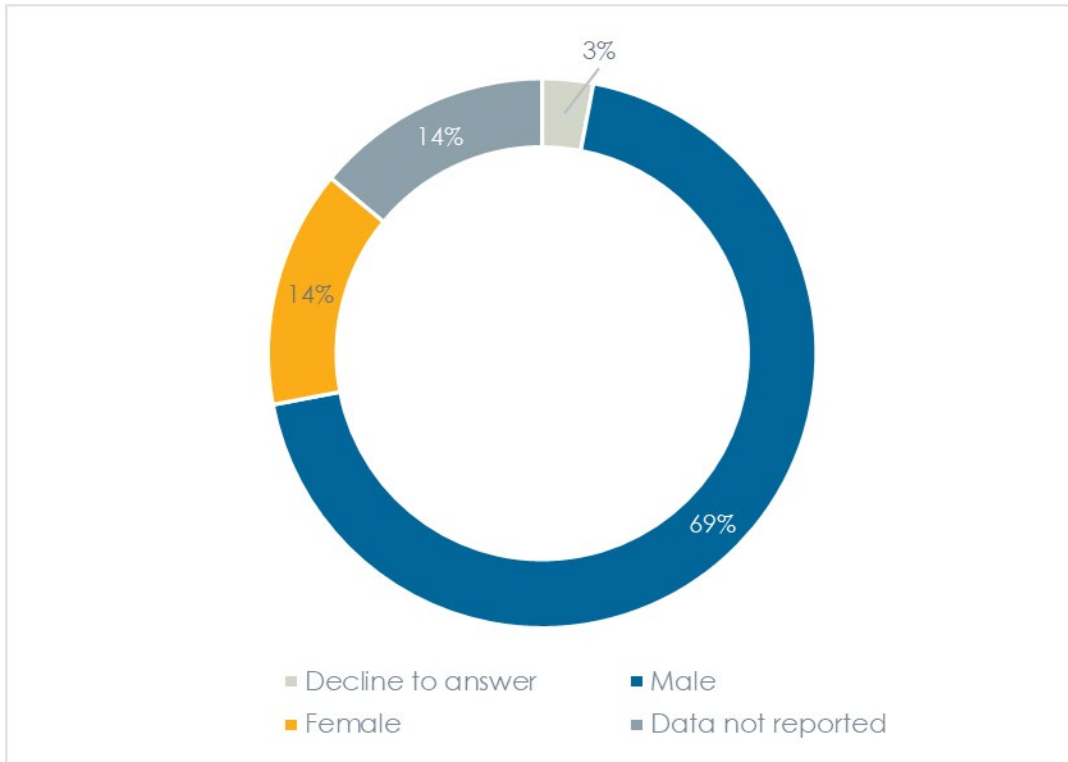
Figure 35 – Job Trainee Race/Ethnicity Breakdown



N = 55

Figure 35 is a snapshot of SOMAH project job trainee breakdown by race/ethnicity. Latino(a) or Hispanic, Black/African American, Asian and American Indian/Alaskan Native are the majority of SOMAH trainees.

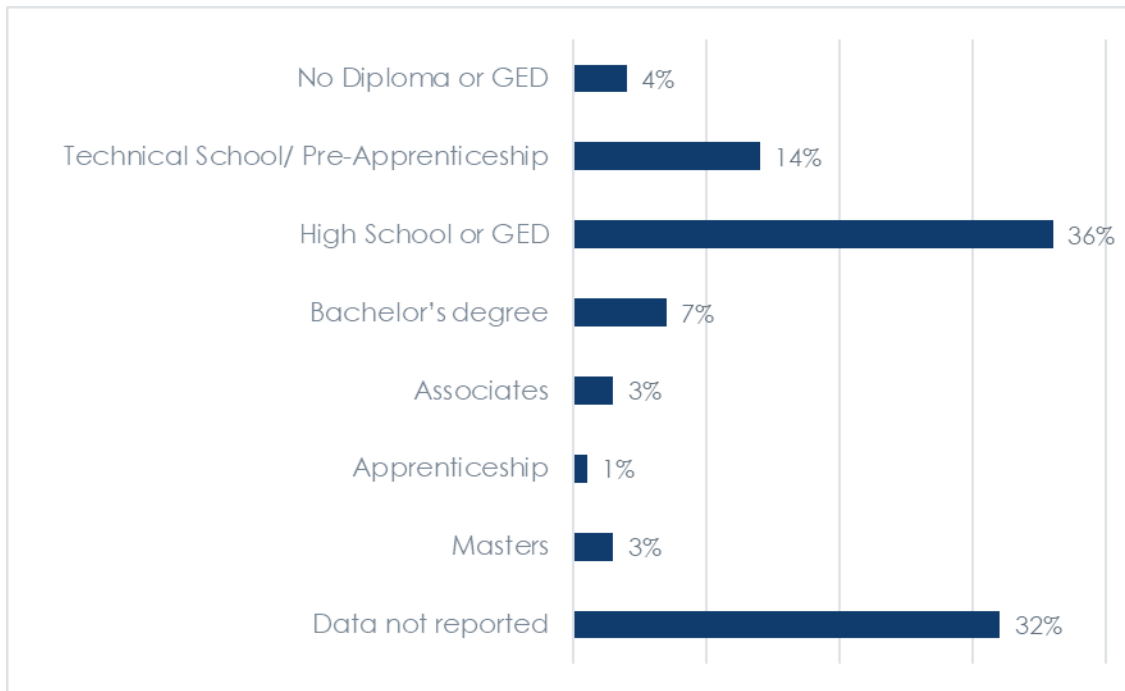
Figure 36 – Job Trainee Gender Breakdown



N = 55

Figure 36 is a snapshot of SOMAH project job trainee breakdown by gender. Most trainees (69%) identify as male while 14% identify as female.

Figure 37 – Highest Level of Job Trainee Education



N = 55

Figure 37 is a snapshot of SOMAH project job trainee breakdown by the highest level of education. A total of 58% of SOMAH job trainees reported having either a high school diploma or GED, no GED, an associate degree or having attended a technical school/pre-apprenticeship or apprenticeship.

Figure 38 – Percentage of Trainee Placements by Project Role

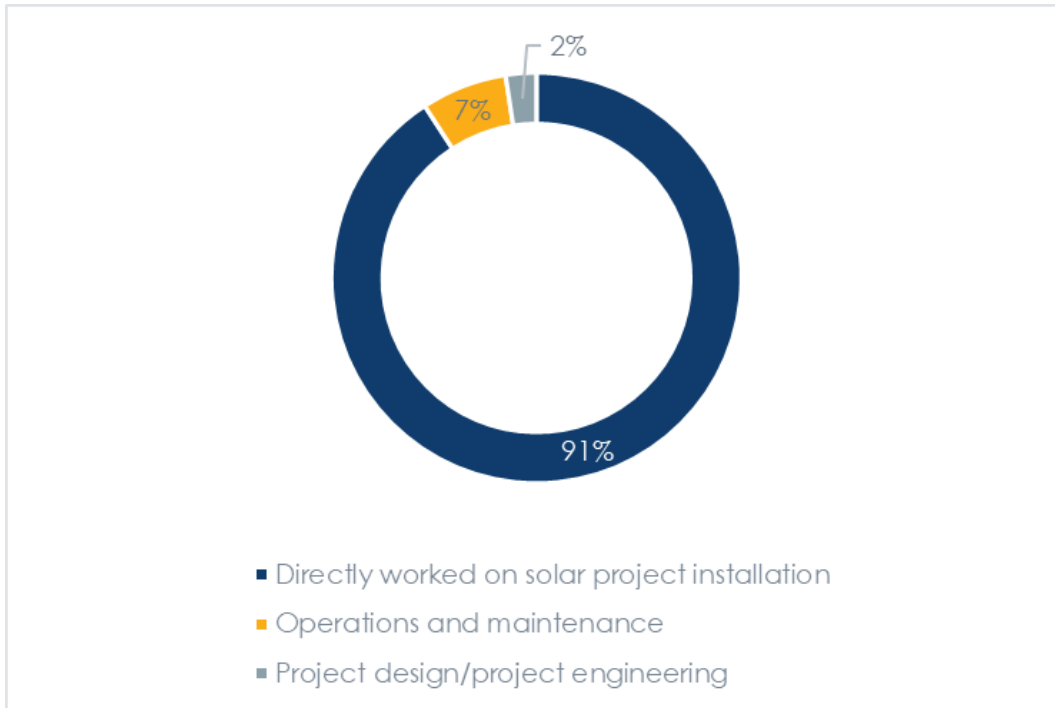


Figure 38 is a snapshot of SOMAH project job trainee breakdown by project role placements, with 91% of tasks assigned being directly related to solar installation.

The Job Training Affidavits report 105 job trainees were hired to work on SOMAH projects for 221 job training opportunities. The SOMAH PA collected demographic information from these training opportunities through the Job Trainee Affidavit. Figures 39-41 depict findings from the analysis of this data.

Figure 39 is a snapshot of SOMAH project job trainee average wage relative to California's minimum wage. On average, SOMAH job trainees earn \$20.97/hour, surpassing the California minimum wage of \$16.00/hour at time of reporting.

Figure 39 – Average Trainee Wage Compared to CA Minimum Wage

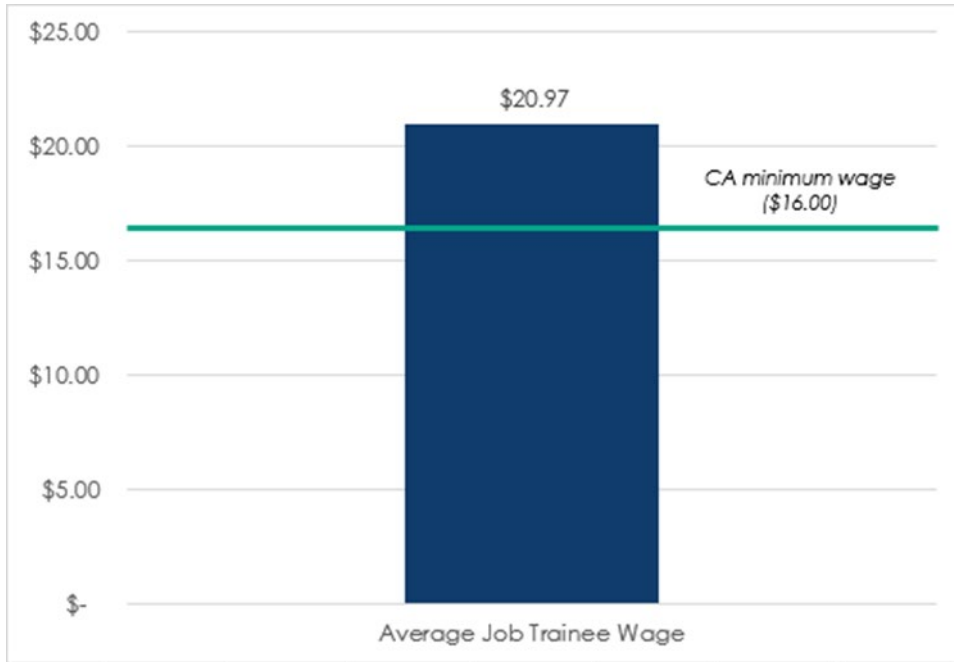


Figure 40 – Hours per Job Trainee Placement

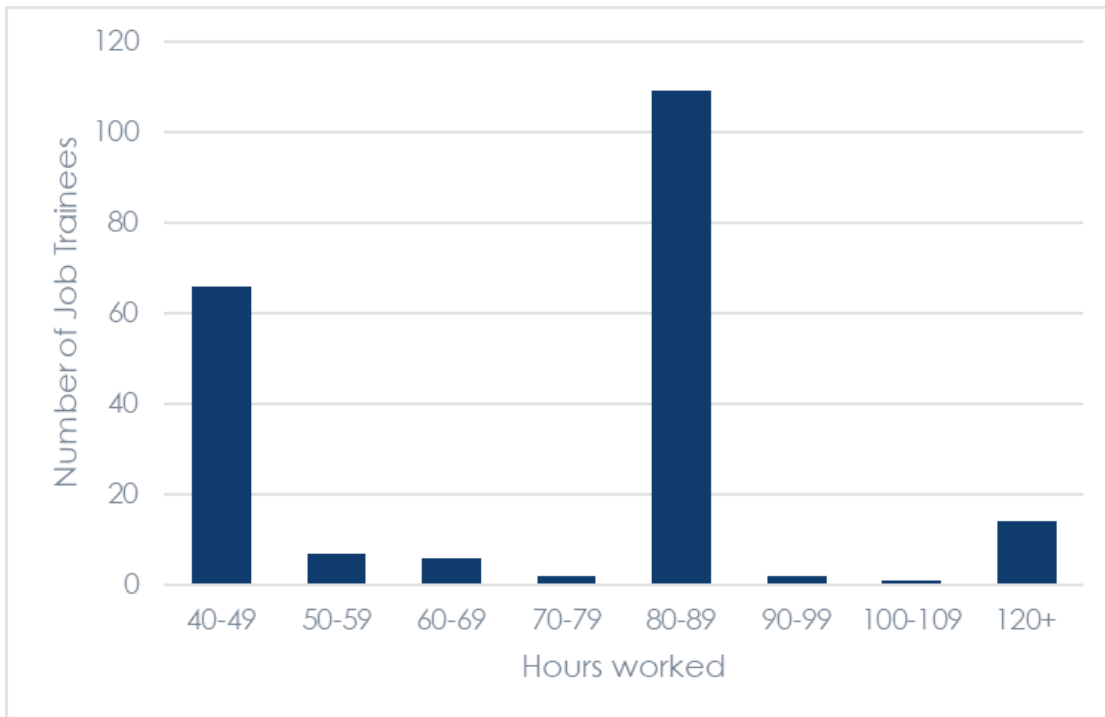




Figure 40 is a snapshot of the number of SOMAH job trainees and the hours they worked. On average, most SOMAH trainees worked 80-89 hours for their respective SOMAH projects.

Figure 41 – Percentage of Trainee Placements by Employment Status

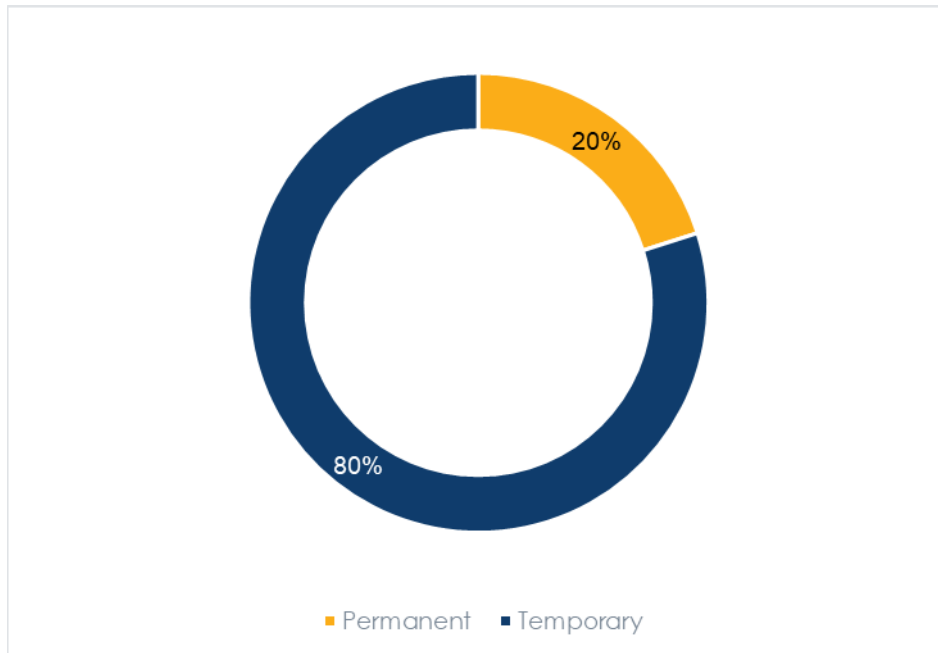


Figure 41 is a snapshot of SOMAH project job trainee breakdown by employment status, with 80% of SOMAH trainees classified as temporary workers during their tenure with the respective contractor. A total of 20% of trainees were hired as full-time employees after their work on a SOMAH project.

3.4 Community Based Organizations

The SOMAH PA continues to work alongside eight CBO partners who support the SOMAH PA with direct outreach in their respective service areas. Prioritized audiences include property owners, local stakeholders with an emphasis on co-marketing partnerships, and tenant education. Each CBO entered into 2024 with a focus that highlights their strengths and aligns with SOMAH's programmatic goals.

The eight SOMAH CBO partners are:

1. California Environmental Justice Alliance (CEJA)
2. Self-Help Enterprises



3. Asian Pacific Environmental Network
4. Environmental Health Coalition
5. Communities for a Better Environment
6. Community Environmental Council
7. The Niles Foundation
8. OC Goes Solar (OCGS)

In 2024, general community-at-large events were deprioritized in favor of focusing on audience-specific events. Although it was deprioritized, six CBOs still have outreach to the community at large in their scopes for 2024. These CBOs organized and participated in a total of fourteen community outreach events and community tours. During this reporting period, two virtual CBO summits were hosted that brought together all CBO partners and the SOMAH PA to continue sharing strategies, lessons learned and challenges.

Q1 2024 meeting topics included:

- SOMAH Program updates
- Salesforce refresher work session
- Property owner outreach tips

Q2 2024 meeting topics included:

- Updated marketing collateral and CBO resource hub walk-through
- SOMAH financial overview
- Looking ahead at the future of CBO partnerships

Seven of the SOMAH CBO partners continue to support property owner outreach through direct outreach efforts, leading to interest calls. Due to some challenges in this outreach area, the SOMAH PA suggested pinpointing three property management companies per quarter to contact since these companies hold many properties within their portfolio. CBOs conducted 665 outreach activities to engage property owners, including cold calls, emails, one-on-one meetings, presentations, mailers, and in-person site visits to properties located in communities with whom they have working relationships. Eleven Technical Assistance Preview reports were requested due to their outreach, showing prospective program participants what the estimated solar benefit to the property would be. Six CBO partners directly engage with local stakeholders to coordinate co-marketing partnerships with the SOMAH Program. These CBOs have brought in hot leads by cultivating relationships with their contacts and presenting the benefits of the SOMAH Program. CBOs participated in 32 outreach activities to engage with local government stakeholders. The SOMAH PA meets regularly with participating



CBOs on stakeholder outreach on either a monthly or quarterly basis. The following leads were made by the SOMAH CBOs in this reporting period:

- CEJA – Introduced to San Diego Power Authority, which led to an interest call to discuss opportunities to collaborate in 2024.
- CEJA – Introduced SOMAH to the Western Riverside Council of Governments and I-REN, which led to ongoing communications for collaboration.
- CEJA – Introduction to Association of Monterey Bay Area Governments that led to a meeting to discuss.
- OCGS – Initial outreach efforts in the prior reporting period with Orange County Power Authority) has led to approval of co-marketing with SOMAH. Discussions have commenced and co-marketing will take place in 2024. Also, OCGS obtained a supportive quote from City of Irvine Mayor Farrah Khan.

With the support of OCGS, ongoing discussions with the City of Santa Ana created an opportunity to connect with The Kennedy Commission and collaborate on an in-person event for property owners and developers on April 25, 2024. This event introduced SOMAH to American Family Housing, Community Action Partnership of Orange County, Irvine Community Land Trust, C&C Development, and Jamboree Housing.

Seven CBOs continue to support the SOMAH PA with tenant education services. CBOs co-led two tenant education workshops at SOMAH properties, including Lexington Green Apartments in El Cajon and Loma Sierra Apartments in Loma Linda. During these sessions, 38 tenants were engaged and noted that they felt more knowledgeable about what to expect from their local project and the SOMAH Program overall after the presentations. With more tenant education services being requested at properties, CBOs have had to take a step back on requests from outside their service territories.

Five CBOs continue to educate the community on solar job training opportunities by providing presentations at workforce development conferences, sharing resources at community tabling events, and creating innovative ways to bring awareness of the solar industry to workers. CBOs participated in 16 outreach activities to engage community members on SOMAH job training opportunities. Since the launch of the HeatSpring SOMAH Academy in 2023, CBOs have been promoting the curated list of free self-study courses to community members. In 2024, CBO partner Communities for a Better Environment piloted a HeatSpring SOMAH Academy program in collaboration with the SOMAH PA to support four participants in completing all courses to be eligible for SOMAH job training opportunities.



CBO partnerships have proven to be extremely important to ensuring SOMAH outreach messaging and materials are appropriate and well-informed to reach multifamily affordable housing providers and their residents across the state.

3.5 Technical Assistance

The primary objective of SOMAH's Technical Assistance and Support Services offerings is to ensure property owners and solar contractors receive accurate, useful and educational information. SOMAH goes beyond providing financial incentives by helping to bridge knowledge gaps and facilitate solutions to common issues as property owners and solar contractors consider, plan and install a solar PV system. Installing solar PV on existing multifamily properties often requires property owners to navigate and overcome barriers, including complicated ownership and financing structures, and understand the costs and benefits of pursuing solar PV, and SOMAH is here to help.

Even with most SOMAH projects enrolled in Track B, there is still a vital need for SOMAH to offer objective third-party expertise and resources to protect property owners and low-income communities the program serves. The program's Technical Assistance and Support Services are designed to balance information provided by solar contractors to ensure property owners and those receiving benefits from the SOMAH Program are receiving objective, unbiased information related to their solar PV installation.

SOMAH's Technical Assistance and Support Services cover a wide range of services and are available throughout the entire solar installation, from preliminary system designs to interconnection support to system monitoring support, including job training and tenant education support services, all offered with the goal of providing consumer protection, reducing the burden of participation and increasing access to objective expertise and resources.

SOMAH is flexible in meeting the needs of property owners and solar contractors as they arise, whether they are participating in the program or considering program participation. SOMAH can provide personalized support through several offerings, including Technical Assistance Preview reports, upfront Technical Assistance, and Technical Assistance and Support Services, like fleet monitoring.

3.5.1 Technical Assistance Preview Reports

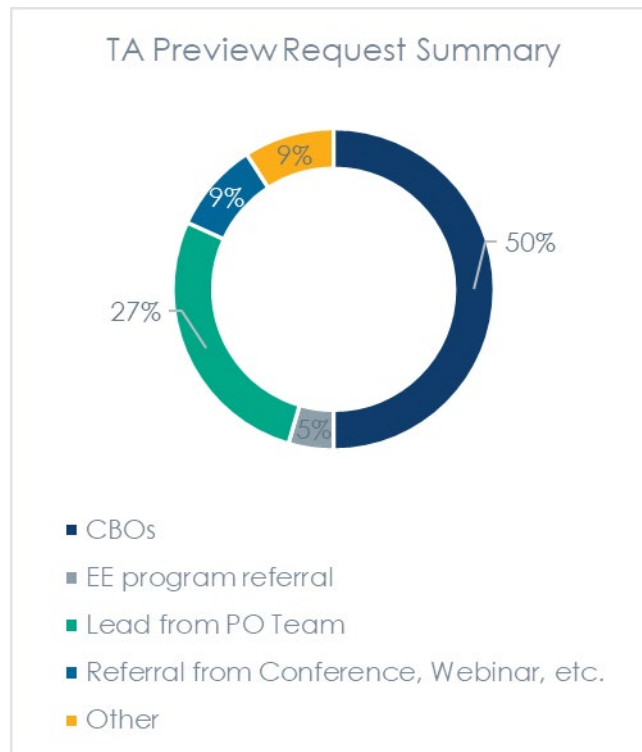
SOMAH provides a no-cost and no-obligation offering called Technical Assistance (TA) Preview reports. TA Preview reports can be used as a marketing tool to present to property owners to help them decide if taking the next step and enrolling in SOMAH is right for them. TA Preview reports are condensed versions of the solar feasibility reports that are presented to property owners as a part of the program's upfront TA services. TA



Previews are customized for each property and include a preliminary solar PV system design and sizing, estimated incentive amount and financial analysis. TA Preview reports support property owners in weighing the prospective costs and benefits of installing solar. At the close Q2 2024, 22 TA Preview reports have been created for unique properties and presented to prospective property owners.

Figure 42 summarizes the sources of TA Preview requests in Q1-Q2 2024. Half of the requests for TA Previews came from the program's CBO partners, 27% came from direct outreach from the property owner engagement team, and 9% came from referrals from conferences, webinars, etc.

Figure 42 – TA Preview Request Summary



3.5.2 Upfront TA

Upfront TA services are designed to supply property owners with educational, technical and financial resources to facilitate their solar PV installation. Offering upfront TA services sets the SOMAH Program apart from similar previous programs and provides property owners less familiar with solar equal access to program benefits. As a part of upfront TA, property owners are assigned an energy project manager who serves as an objective third-party resource to answer questions and provide education and support as needed, even after a Reservation Request Package has been submitted. The energy



project manager serves as a single point of contact for the property owner across the program.

Property owners enter upfront TA with varying levels of solar knowledge. Through guidance from their energy project manager, each property owner receives personalized support to accommodate their specific needs, including:

- Understanding the SOMAH Program process.
- Investigating the solar potential at their property through the presentation of a solar feasibility report.
- Selecting an eligible contractor using a multiple bid process.
- Evaluating the costs and benefits of moving forward with a solar PV project.
- Integration with energy efficiency, energy storage and electric vehicle programs.

To date, 28 projects have received upfront TA services. Of those 28 projects, 16 projects are currently receiving upfront TA services, six projects are now at a later milestone in the SOMAH application life cycle, and six projects cancelled after receiving upfront TA services.

Tenant benefits continue to be a central pillar of the SOMAH Program as well as a focus for projects receiving upfront TA. For the 22 projects that have received or are receiving upfront TA services, 85% of the clean energy produced from the solar PV systems is projected to directly benefit the more than 844 low-income households via virtual net metering (VNEM) bill credits, offsetting 86% of their expected historic electrical consumption.

Additionally, the tenants connected to the projects that have received or are receiving upfront TA services will gain added benefits from deep energy retrofits in conjunction with solar. Over 60% of those projects were either referred to SOMAH by a comprehensive energy efficiency program or took advantage of SOMAH's upfront TA services to receive a referral to, and enroll in, a comprehensive energy efficiency program. Because it is important to consider energy efficiency upgrades and electrification when considering solar PV, one goal of SOMAH's upfront TA services is to create an integrated approach for property owners when leveraging SOMAH with other energy efficiency programs.

The average estimated system size for the 22 projects is 89 CEC-AC kW with an average expected aggregate annual output of 145,593 kWh. Figure 43 outlines additional system statistics across the IOU territories for the projects.



Figure 43 – Track A Summary

IOU	Number of Active Track A Projects	Estimated SOMAH Incentive	Estimated System Size (CEC-AC kW)	Expected Aggregated Annual Output (kWh)
PG&E	16	\$2,378,261	957	1,473,651
SCE	4	\$1,573,935	658	1,170,722
SDG&E	2	\$843,248	248	413,089
Liberty Utilities	0	\$0	0	0
PacifiCorp	0	\$0	0	0
Total	22	\$4,795,444	1,863	3,057,462

To improve property owners' understanding of the intricate ownership and financing structures for their projects, as well as further expand SOMAH's upfront TA offerings, resources and guidance are being made available to property owners about the changes to the federal investment tax credit that can enhance the financial benefits. Additional resources and guidance will ensure property owners understand the steps and timelines involved to leverage tax credits that will make their projects more financially viable.

SOMAH's upfront TA services go beyond providing support for property owners as they consider and plan for solar. Three projects receiving upfront TA services enrolled in SOMAH with existing owner systems intending to install new tenant-benefitting systems. With SOMAH's support, it was discovered through utility bill analysis and an in-depth look into the system monitoring portals that each of the existing owner systems had equipment failures or system issues that caused the systems to not perform at their full capacity. With this discovery, the property owners could engage with their installing contractors to restore the systems to full health and SOMAH used it as an opportunity to train the property owners on their system monitoring portal and how to monitor and maintain performance going forward. Taking this a step further, for two of the projects, the result of the utility bill analysis was that the owner-benefitting accounts were not on the correct rate structure to receive the full benefits from the solar systems. SOMAH worked with the utility to correct this mistake and rebill the owner accounts, resulting in a credit of almost \$90,000.

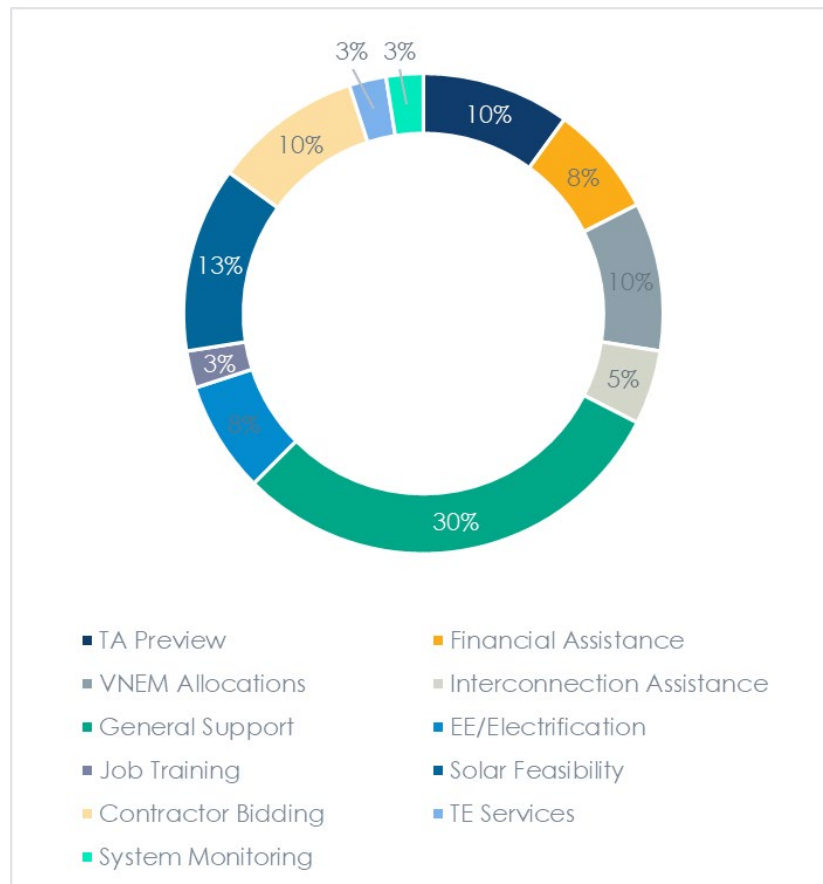


3.5.3 TA and Support Services

Both property owners and solar contractors can have questions or challenges when pursuing solar, and SOMAH's TA and support services are designed to be available to all parties involved with a solar project.

Since the launch of the updated Technical Assistance and Support Services [Request Form](#) in Q1-Q2 2024, 14 requests have been made so far. Of the 14 requests, over 30% came from solar contractors. Of the 14 requests, Technical Assistance and Support Services have been provided for 40 service request types. Figure 44 shows the breakdown of the services provided in the first half of 2024. The service request type most frequently requested, accounting for 30% of requests, was general program support, followed by solar feasibility, accounting for 13% of requests, then contractor bidding, TA Preview requests and VNEM allocations, each accounting for 10% of requests. One request for a TA Preview converted to a Track A project.

Figure 44 – Breakdown of TA and Support Service Request Types





3.5.4 Fleet Monitoring

In Q1 2023, SOMAH rolled out the program's fleet monitoring service. Fleet monitoring is a program requirement to ensure SOMAH-incentivized PV systems are performing as expected and economic benefits are realized.

As of June 30, 2024, 125 completed SOMAH PV systems are connected and monitored in SOMAH's monitoring platform SunSpot. SunSpot identifies and flags PV systems that are underperforming compared with expected performance. If a system is flagged, the SOMAH PA reaches out to system contacts to discuss the underperformance and necessary next steps to prevent future underperformance issues. If the system contact does not respond or act within one year of notification, SOMAH may initiate repayment or "clawback" of the SOMAH incentive. The clawback could be up to 90% of the paid SOMAH incentive. SOMAH's fleet monitoring does not replace standard operating and maintenance procedures, as it is the system owner's responsibility to facilitate regular maintenance. Please refer to the SOMAH Program Handbook for additional information regarding clawbacks.

To date, the total solar generating capacity reported in SunSpot is about 20.22 MW CEC-AC (47,075,625 kWh), and overall, the fleet of completed SOMAH projects are performing at 77% of their expected level. SOMAH is committed to monitoring and maximizing the system production, which translates to monthly savings for the residents. If systems are underperforming, that means that the full benefits for the residents, as well as the property owners, are not being realized.

As one example of SOMAH's commitment to monitoring and maximizing system production and savings, SunSpot flagged a project with a significant, sudden drop in production. After alerting the solar contractor of the issue, it was shared that several inverters had issues or were shut down without warning. While continuing to monitor the project, it was noticed that all inverters shut down completely. After another alert to the solar contractor, a process was initiated to replace the equipment under warranty at no cost to the property owner, who is also the system owner. To date, production remains within the expected threshold.

To provide further support for SOMAH projects and system owners after installation is complete and the system is interconnected, SOMAH created resources on the [SOMAH website](#). These resources help system owners learn the best operations and maintenance (O&M) practices for solar systems and provide tips for monitoring system performance. SOMAH's resources can be used to learn how an O&M plan can ensure the long-term functionality of a system and how to track system performance over the system's lifetime. The resources are also useful for on-site staff and those who may



interact with the system regularly. System owners can also submit a TA request form to request personalized support to help analyze and manage system performance.

Fleet monitoring data at a glance for Q1-Q2 2024:

- 125 systems monitored
- 18.7 MW of capacity
- 14.2 GWh of estimated production
- 11.2 GWh of production
- Percentage between production and estimate 86%
- Approximate emissions avoided based on MW capacity using EPA AVERT tool: 8,820 tons of CO₂ (18.7 MW - 19 GWh)

Figure 45 – Estimated Versus Actual System Performance

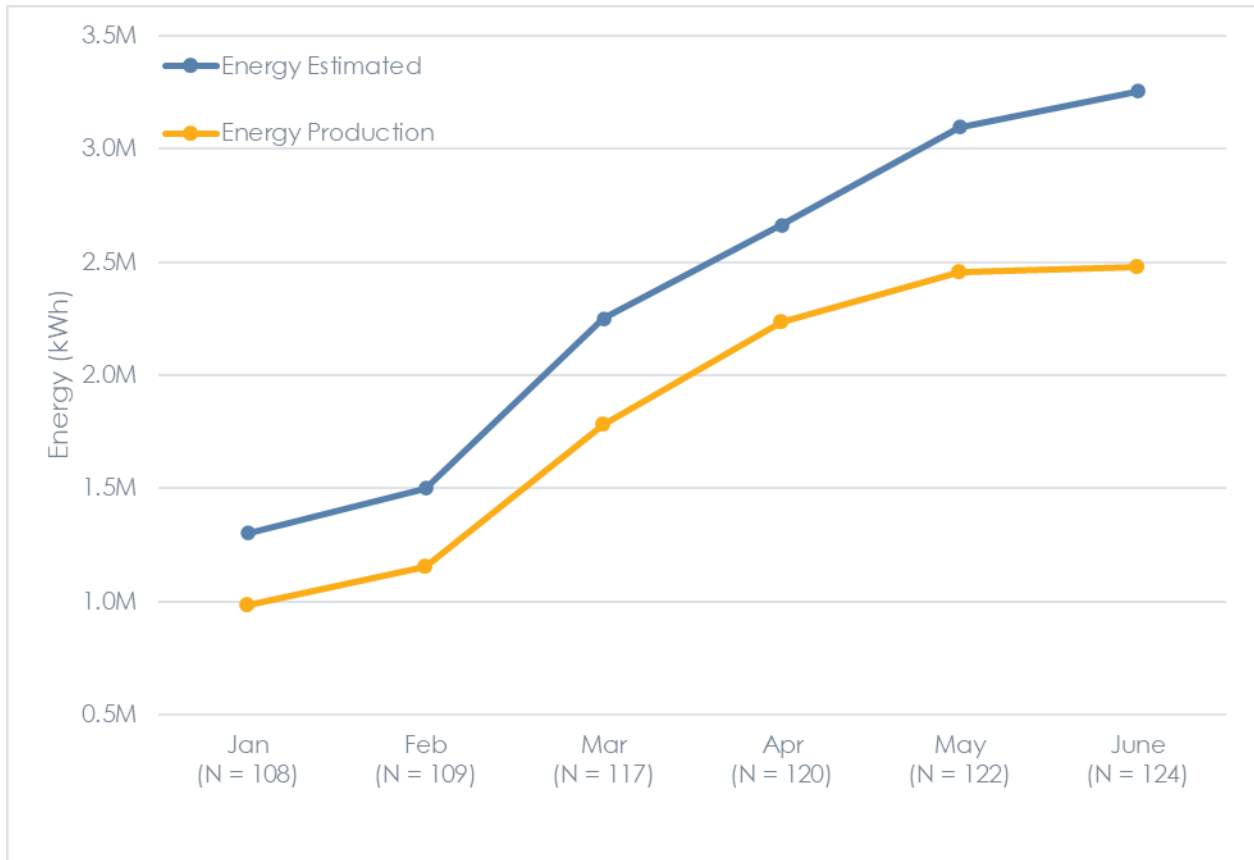


Figure 46 – Completed SOMAH Systems Being Monitored



4. Program Planning and Development

The SOMAH PA takes an adaptive approach to ensure feedback is regularly solicited from program participants and stakeholders and that decisions about the program are made with transparency. The SOMAH PA works in close partnership with the program's advisory bodies and CBO partners, with input from other stakeholders, to ensure the program remains accountable to the communities it is intended to benefit. The following section provides information on the SOMAH PA's maintenance of official records as well as its feedback mechanisms.

Official Record Maintenance

The SOMAH Program has various types and frequencies of public reporting. The information below outlines these reports and their location.

- SOMAH Incentive Budget Report and Working Data Set (updated weekly)
- Semiannual Progress Report
- Semiannual Expense Report
- Annual Marketing, Education and Outreach (ME&O) Plan

Place of record: https://www.californiadgstats.ca.gov/programs/#_subsection_17

- Special reports to the California Legislature



- Third-party evaluations and reports

Place of record: <https://www.cpuc.ca.gov/somah>

During this reporting period, the SOMAH PA highlights: 1) an update on activities related to reporting, feedback and accountability; 2) a recap of the 2023 third-party evaluation; and 3) program design updates, including handbook updates, the rollout of the revised incentive levels and legislative updates.

4.1 Reporting, Feedback and Accountability Mechanisms

The SOMAH Program has several accountability and feedback mechanisms to ensure key stakeholders are provided opportunities to contribute to program development and implementation. These include two advisory bodies, public forums and monthly working meetings with the participating SOMAH IOUs.

4.1.1 Public Forums

SOMAH public forums are held periodically throughout the year to allow the SOMAH PA to: 1) share program updates; 2) propose program modifications and design changes; and 3) solicit feedback from program stakeholders about their experiences with the program, including challenges, barriers and areas for improvement. The SOMAH PA publishes the presentation slide decks and meeting notes, including stakeholder questions and SOMAH PA answers, via the CalSOMAH.org website following each public forum.

During this reporting period, the SOMAH PA held one public forum in February. Topics covered included a general program update, a legislative and policy update focused on SB 355, and an overview of the new prevailing wage requirements through AB 2143 by the CPUC and its contractor GCAP Services. Eliminating unnecessary public forums aligns with feedback from third-party evaluators and minimizes commitments from the SOMAH PA, thus the next public forum is scheduled for Q3 2024.

4.1.2 IOU Working Group

During the reporting period, the SOMAH PA held six IOU Working Group meetings. The Q1-Q2 2024 working group meetings focused on the following topics:

- January 2024 – General program and marketing coordination updates, IOU budget forecasting, IOU referral process, SOMAH & storage.
- February 2024 – General program and marketing coordination updates, IOU budget forecasting, IOU referral process, tenant hotline.



- March 2024 – General program and marketing coordination updates, interconnection and bill credits, IOU referral process, financing programs.
- April 2024 – General program and marketing coordination updates, interconnection and bill credits.
- May 2024 – General program and marketing coordination updates, interconnection and bill credits, IOU referral process.
- June 2024 – General program and marketing coordination updates, interconnection and bill credits, IOU referral process.

Referrals and co-marketing between the IOUs and SOMAH are explored further under Section 3.2.6, Stakeholders.

4.1.3 SOMAH Advisory Groups

SOMAH's two advisory groups are the SOMAH Advisory Council and the Job Training Organization (JTO) Task Force. They help the program stay accountable to the communities it was intended to serve.

Advisory Council

The purpose of the SOMAH Advisory Council (SOMAH AC) is to ensure the voices and interests of equity-focused community advocates and key stakeholders remain at the center of the SOMAH Program and to make certain SOMAH maximizes benefits to low-income tenants and DACs by advising the SOMAH PA on program development and implementation. Since the last reporting period, there have been no changes to SOMAH AC membership. The current cohort has 11 members representing the fields of environmental justice, workforce development/labor, tenant rights and economic justice, affordable housing, tribal communities and the solar industry. The SOMAH AC meets virtually on a quarterly basis.

During this reporting period, the cohort had its kick-off meeting virtually in May 2024.

Q2 2024 meeting topics included:

- A refresher on the SOMAH AC and updates on SOMAH's advisory groups.
- An update on program statistics and changes, including program modifications per SB 355.
- A short program overview and group discussions on how the SOMAH PA and AC can work together to achieve their goals for the term.

The SOMAH AC will continue meeting virtually on a quarterly basis.



Job Training Organization Task Force

The purpose of the Job Training Organization Task Force (JTO Task Force) is to ensure the voices and interests of job training organizations remain at the forefront of the SOMAH Program's job training efforts. It advises the SOMAH PA on strategies for engaging job trainees and the creation of resources to ensure trainees obtain maximum benefit from training opportunities on SOMAH installation projects, including subsequent, full-time employment in the solar industry and, over time, career advancement and wage growth. The SOMAH PA and JTO Task Force have created strategies that address outreach methods and pathways, targeted applicants and priority gaps.

The JTO Task Force is composed of 10 regionally diverse representatives from JTOs, including California Community Colleges, career technical education programs, community nonprofits and private job training centers. Like the SOMAH AC, the JTO Task Force meets quarterly. Since the last reporting period, the JTO Task Force has held two quarterly meetings.

Q1 2024 meeting topics included:

- A refresher on the SOMAH AC and updates on SOMAH's advisory groups.
- An update on the JTO Task Force's apprenticeship working group.
- Visioning and goal-setting exercise where JTO Task Force members discussed goals and priorities for the 2024-2025 term.

Q2 2024 meeting topics included:

- Workforce development team updates.
- SOMAH Program, PA, and budget overview.
- Fleet monitoring overview and updates.

The SOMAH AC will continue meeting virtually on a quarterly basis.

4.1.4 Third-Party Program Evaluation

As directed in D.17-12-022, Energy Division (ED) is to provide regular evaluations of the SOMAH Program to the legislature. Verdant Associates has operated as the third-party evaluator for the SOMAH Program for Phase I and Phase II evaluations, the 2022 Vendor Assessment Report and the 2023 Triennial SOMAH Evaluation Report. These evaluation efforts are designed to assess program impacts and progress on metrics and reaching program goals. The [CPUC website](#) maintains records of all files relating to the SOMAH evaluation reports.



2023 Triennial Evaluation

- October 4, 2022: Verdant held a [public webinar](#) to share the [research plan](#) with stakeholders followed by [public comments](#) that were due October 14, 2022. The SOMAH PA then engaged in coordination efforts with Verdant at the end of 2022 into early 2023 to support their data collection efforts and analysis for the assessment.
- June 16, 2023: Verdant held a triennial SOMAH [evaluation report webinar](#) with a high-level presentation of their findings and an opportunity for attendees to ask questions. The comment period for stakeholders and for the SOMAH PA to provide feedback concluded on June 30, 2023.
- July 14, 2023: Verdant released the [final report](#) including responses to comments. Following the finalized report, Verdant issued a recommendation table summarizing their best practice findings and recommendations for the PA and IOUs to address in the Response to Recommendations (RTR) process.
- October 31, 2023: The [PA and IOUs RTR](#) was circulated for a two-week public comment period. With only one comment received, and directed to the PA, the RTR process was officially completed on December 1, 2023, when the [reply to comment](#) was submitted to Energy Division.

While some of the recommendations had already been addressed or action was underway, the PA will continue action on the remaining recommendations aligning with the timelines outlined in the RTR document. The SOMAH PA continues to work closely with Energy Division to identify opportunities to incorporate key recommendations into the program's overall priorities and strategic efforts. During regular check-ins, the SOMAH PA and Energy Division discuss ongoing actions for RTR implementation and overall program administration efforts. Taken together, feedback and input from key audiences, participants, stakeholders and advisors will help inform and modify program areas to ensure the approaches are successful in reaching the audiences and communities SOMAH is designed to serve.

4.2 Program Design and Updates

This section provides an overview of program design changes and prospective changes as well as updates on related regulatory activity.

To address financial barriers of SOMAH projects and increased project costs due to inflation, labor challenges and supply issues, D.23-03-007 allowed the SOMAH PA to increase incentive levels to \$3.50/watt for tenant areas and \$1.19/watt for common areas (highest levels) and ended the annual incentive step-down. See more details on handbook versions and timelines in Section, 4.2.2, Program Handbook.



Increased incentives were automatically applied to all new projects and projects that were submitted after March 21, 2023. Projects that had not yet submitted their Incentive Claim Milestone as of June 13, 2023, were eligible for the revised incentive levels by submitting a VersaForm,²⁵ a signed acknowledgement form by the host customer, by December 31, 2023. To finalize claiming the higher incentive, projects that submitted a VersaForm request are required to submit supporting documentation at their next application milestone.

See Section 3.1.1, Applications and Incentive Statistics, and Section 3.1.2, Program Payments, for more information on application activity and the impacts of the available higher incentives.

4.2.1 Senate Bill 355 and Handbook 8

On October 7, 2023, Senate Bill (SB) 355 was signed by the governor. As a result, the SOMAH PA submitted a Tier 2 Advice Letter 147-E on January 5, 2023, to modify the SOMAH Program Handbook with edits to incorporate a portion of the program changes from SB 355 that were actionable for the PA to enact within a revised Handbook 8. SB 355 was implemented in Q1 2024 via the approved Handbook 8. The following program updates were included:

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

The remainder of program changes directed in SB 355, but not included in Handbook 8, such as advance payment loans and integration of new construction project eligibility,

²⁵ Per Handbook Section 3.6 Request for 2023 Revised Incentive, “The VersaForm direct email link will be available through December 31, 2023, for eligible projects to request the 2023 revised incentive in a timely manner.”



require further direction from the CPUC before additional modifications will be made to the program.

4.2.2 Program Handbook Records

This section reviews the SOMAH PA's work to update the SOMAH Program Handbook conducted during this reporting period, as well as relevant regulatory decisions not attached to the PA's work to update the Handbook. Figure 47 provides a non-exhaustive overview of the SOMAH Program Handbook since the inaugural edition, including major updates by version.

Figure 47 – Handbook Versions

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



	<ul style="list-style-type: none"> Option for SOMAH PA to perform remote site inspections at Incentive Claim 	
Handbook 7	<ul style="list-style-type: none"> Elimination of the annual incentive step-down Increased incentive levels 	June 2023
Handbook 8	<ul style="list-style-type: none"> Extended the SOMAH Program to 2032 Revised the Income Eligibility Pathway to require at least 66% of the property residents have incomes at or below 80% AMI Addition of third eligibility pathway for properties owned by a California Native American tribe Addition of fourth eligibility pathway for rental housing properties owned by a public housing authority or agency Updating the term “building” to “property” in the definition of “Qualified multifamily affordable housing property” 	February 2024

The SOMAH PA is committed to continual improvement in program planning and development, while balancing the needs for robust stakeholder engagement in proposing updates and reducing program complexity to the maximum extent possible. With those guiding principles, the SOMAH PA works closely with stakeholders to address program gaps and ensure the program is being implemented in ways that provide meaningful economic benefits to participating tenants and properties, particularly in the state's environmental justice communities.

5. Conclusions

With influential program changes like increased incentives and ongoing efforts to reduce program barriers and expand eligibility, the SOMAH PA continues its commitment to supporting applicants and property owners toward a bright future for projects that are new, ongoing, or closing out in 2024. The SOMAH PA continues to expand services for participants as evidenced by the Affordability Prescreen and Technical Assistance and Support Services that have proven to be well-utilized for participants. The 2023 Triennial SOMAH Evaluation Report, Handbook 8, recent updates from SB 355, and the clarified option to re-use forfeited application deposits continue to play an important role in positioning the program for continued success. The SOMAH PA also recognizes the importance of offering training and feedback opportunities to applicants and values the input provided from surveys, interviews and workshops. The program continues to emphasize DACs and tribal communities as priority groups,



aiming to increase program awareness and levels of project participation in both populations. The SOMAH PA is focused on continued engagement with tribal entities to increase applications on tribal lands and removing barriers to tribal project participation.

SOMAH's annual marketing plan continues to guide the program's overarching outreach and marketing strategies to its key audiences. The 2023 Triennial SOMAH Evaluation Report, previous SOMAH-led primary research and audience expertise has helped shape outreach efforts for 2024 and prior years. The 2024 marketing plan focuses on property owner outreach, tribal land properties, contractor and subcontractor diversity, in-person tenant education workshops, showcasing job trainee solar career success stories and increasing stakeholder outreach. Connecting with property owners, with an emphasis on reaching out to newly eligible property owners, will be a focus in the next reporting period. Also, the SOMAH PA plans to host a ribbon-cutting event in the second half of 2024.

The SOMAH PA anticipates an increased rate of project completion along with a stable volume of progress payments and increase of final incentive payments in the second half of 2024. The SOMAH PA looks forward to reporting on maintaining a baseline and increasing number of new project entries through the rest of 2024 with impactful progress toward the program's 300 MW goal. The SOMAH Program was designed to deliver renewable energy and financial benefits to tenants of multifamily affordable housing. To ensure they are supported equitably through a dynamic and adaptive program, the SOMAH PA continues to engage in evaluation efforts and solicits feedback and input from CBOs, participants, stakeholders and trusted advisors.

6. Appendix A

As referenced in Section 3.1.1, Application and Incentive Statistics, the following is the description of PowerClerk statuses.

Upfront Technical Assistance

- Upfront Technical Assistance Request Submitted: Applicant has entered the required information and uploaded the Upfront Technical Assistance Request documentation for program administrator review.
- Upfront Technical Assistance Review: Upfront Technical Assistance Request is under review by the program administrator.
- Pending QA – Upfront Technical Assistance Request: The Upfront Technical Assistance Request has been reviewed by the program administrator and is pending quality assurance check.
- Suspended – Upfront Technical Assistance Request: Upfront Technical Assistance Request is incomplete or requires further action by the applicant. The program administrator sent correction information via email from the PowerClerk portal.
- Overdue – Technical Assistance Request Follow-up: The requested corrections for the Upfront Technical Assistance Request are overdue and should be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Resubmitted – Upfront Technical Assistance Request: The Upfront Technical Assistance Request has been resubmitted with corrections and is in queue for review by the program administrator.
- Upfront Technical Assistance Approved: Applicant has entered the required information and uploaded the reservation request documentation for review.

Reservation Request Milestone

- Reservation Request Submitted: Applicant has entered the required information and uploaded the reservation request documentation for review.
- Reservation Request Review: Reservation request is in queue for review by the program administrator.
- Pending QA – Reservation Request: Reservation request is under final review by the program administrator.
- Reservation Request – IOU Data Results Shared: The Reservation Request - Phase I is complete. The IOU data results have been shared and Phase II may now be started.

- Suspended – Reservation Request: Errors were found during reservation request review and require corrections by the applicant. The program administrator sent correction information via email from the PowerClerk portal.
- Suspended – Reservation Request II: Errors were found during Reservation Request Phase II Review and require corrections by the applicant. The program administrator sent correction information via email from the PowerClerk portal.
- Overdue Corrections – Reservation Request: The requested corrections for the reservation request are overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Resubmitted – Reservation Request: The reservation request has been resubmitted with corrections and is in queue for review by the program administrator.
- Pending Data Request: The application is in queue to be sent to the IOUs for electric usage data request.
- Pending IOU Data: Electric usage data has been requested from the IOU.
- Processing IOU Data: Electric usage data has been received and is under review by the program administrator.
- Pending Application Deposit: Reservation request is free of errors and pending receipt of the application deposit before moving to reservation approved status.
- Overdue – Application Deposit: The application deposit is overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Reservation Approved: Reservation request requirements have been met and the application deposit has been received. The project's funding will be reserved for 18 months, starting from the reservation approval date.

Energy Efficiency Compliance Milestone

- Overdue – Energy Efficiency Compliance Milestone: The Energy Efficiency Compliance Milestone is overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Energy Efficiency Compliance Milestone Submitted: Applicant has entered the required information and uploaded the Energy Efficiency Compliance Milestone documentation for review.
- Energy Efficiency Compliance Milestone Review: Energy Efficiency Compliance Milestone is in queue for review by the program administrator.
- Pending QA – Energy Efficiency Compliance Milestone: The Energy Efficiency Compliance Milestone has been reviewed by the program administrator and is pending quality assurance check.
- Suspended – Energy Efficiency Compliance Milestone: Errors were found during Energy Efficiency Compliance Milestone Review and require corrections by the

applicant. The program administrator sent correction information via email from PowerClerk.

- Overdue Corrections – Energy Efficiency Compliance Milestone: The requested corrections for the Energy Efficiency Compliance Milestone are overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Resubmitted – Energy Efficiency Compliance Milestone: The Energy Efficiency Compliance Milestone has been resubmitted with corrections and is in queue for review by the program administrator.
- Energy Efficiency Compliance Milestone Approved: Energy Efficiency Compliance Milestone requirements have been met.
- Pending Site Verification: Program administrator is completing a Site Verification. The application is held in this status until results are received and processed.
- Energy Efficiency Compliance Milestone Postponement Approved: The Energy Efficiency Compliance Milestone Postponement has been approved. The energy efficiency requirements must be submitted with the Proof of Project Milestone or Incentive Claim Milestone.

Proof of Project Milestone

- Overdue – Proof of Project Milestone: The Proof of Project Milestone is overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Proof of Project Milestone Submitted: Applicant has entered the required information and uploaded the Proof of Project Milestone documentation for review.
- Proof of Project Milestone Review: Proof of Project Milestone is in queue for review by the program administrator.
- Pending QA – Proof of Project Milestone: The Proof of Project Milestone has been reviewed by the program administrator and is pending quality assurance check.
- Suspended – Proof of Project Milestone: Errors were found during Proof of Project Milestone Review and require corrections by the applicant. The program administrator sent correction information via email from the PowerClerk portal.
- Overdue Corrections – Proof of Project Milestone: The requested corrections for the Proof of Project Milestone are overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Resubmitted – Proof of Project Milestone: The Proof of Project Milestone has been resubmitted with corrections and is in queue for review by the program administrator.
- Proof of Project Milestone Approved: Proof of Project Milestone requirements have been met.



Progress Payment Pathway

- Progress Payment Pathway Submitted: Applicant has entered the information and uploaded progress payment documentation for review.
- Progress Payment Pathway Review: Progress Payment Pathway Milestone is in queue for review by the program administrator.
- Pending QA – Progress Payment Pathway: The Progress Payment Pathway has been reviewed by the program administrator and is pending quality assurance check.
- Suspended – Progress Payment Pathway: Errors were found during Progress Payment Pathway Review and require corrections by the applicant. The program administrator sent correction information via email from the PowerClerk portal.
- Overdue Corrections Progress Payment Pathway: The requested corrections for the Progress Payment Pathway are overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Resubmitted – Progress Payment Pathway: The Progress Payment Pathway Milestone has been resubmitted with corrections and is in queue for review by the program administrator.
- Pending Virtual Walkthrough: Program administrator is completing a virtual walk-through. The application is held in this status until results are received and processed.
- Pending IOU Approval – Progress Payment: The program administrator has completed the application review and is now pending payment approval by the IOU.
- Progress Payment Pathway Approved: Progress Payment Pathway is in queue for review by the program administrator.
- Progress Payment Pathway Submitted: Applicant has entered the information and uploaded progress payment documentation for review.
- Resubmitted IOU Approval – Progress Payment: The application has been reviewed by the IOU and is in queue for review by the program administrator.
- Progress Payment Pathway Approved: Progress Payment Pathway is in queue for review by the program administrator.

Incentive Claim Milestone

- Overdue – Incentive Claim Package: The incentive claim is overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Incentive Claim Submitted: Applicant has entered the required information and uploaded the incentive claim documentation for review.



- Incentive Claim Review: Incentive claim is in queue for review by the program administrator.
- Pending QA – Incentive Claim: The incentive claim has been reviewed by the program administrator and is pending quality assurance check.
- Suspended – Incentive Claim: Errors were found during Incentive Claim Review and require corrections by the applicant. The program administrator sent correction information via email from the PowerClerk portal.
- Overdue Corrections – Incentive Claim: The requested corrections for the incentive claim are overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Resubmitted – Incentive Claim: The incentive claim has been resubmitted with corrections and is in queue for review by the program administrator.
- Pending Inspection: Project has been selected for a final PV system inspection and a final field inspection will be conducted. The application is held in this status until inspection results are received and processed.
- Pending IOU Approval – Final Incentive: The program administrator has completed the application review and is now pending payment approval by the IOU.
- Resubmitted IOU Approval – Final Incentive: The application has been reviewed by the IOU and is in queue for review by the program administrator.
- Incentive Claim Approved: Incentive claim requirements have been met and inspection results have been processed (if applicable).
- Pending Payment: The application has been approved for payment. The application is pending payment and the status will change to Incentive Check Mailed status once payment has been issued.
- Incentive Check Mailed: The incentive check has been mailed and should be received by the payee within 30 days of the status date (check date).

Waitlist

- Waitlist: Applicant has entered the required information and uploaded the Technical Assistance Request Form or reservation request documentation for program administrator review in a fully subscribed program.
- Waitlist: Upfront Technical Assistance Review: The Upfront Technical Assistance Request is in queue for review by the program administrator in a fully subscribed program.
- Waitlist: Pending QA – Upfront Technical Assistance Request: The Upfront Technical Assistance Request has been reviewed by the program administrator and is pending quality assurance check.
- Waitlist: Suspended – Upfront Technical Assistance Request: Waitlisted Upfront Technical Assistance Request is incomplete or requires further action by the

applicant. The program administrator sent correction information via email from the PowerClerk portal.

- Waitlist: Overdue – Technical Assistance Request Follow-up: The requested corrections for the Upfront Technical Assistance Request are overdue and must be submitted as soon as possible. Please contact the program administrator if assistance is required.
- Waitlist: Resubmitted – Upfront Technical Assistance Request: The Upfront Technical Assistance Request has been resubmitted with corrections and is in queue for review by the program administrator in a fully subscribed program.
- Waitlist: Pending Data Request: The Upfront Technical Assistance Request has been reviewed by the program administrator and is in queue to be submitted to the IOU for historical electric usage data at the project site.
- Waitlist: Pending IOU Data: Electric usage data has been requested from the IOU and is pending review by the program administrator in a fully subscribed program.
- Waitlist: Processing IOU Data: The program administrator has received historical electric usage data for the project site from the IOUs and is processing the data.
- Waitlist: Upfront Technical Assistance Request Approved: Program administrator has reviewed and approved the Technical Assistance Request in a fully subscribed program. The project may now submit a Reservation Request Package.

Other statuses

- Cancelled: The application is no longer eligible due to missing a deadline or project requirement. The project can be resubmitted with a new application at the current incentive rate.
- Withdrawn: Host customer or applicant requested that the application be removed and permanently marked with the inactive, withdrawn status. Withdrawn applications are moved to cancelled status after 14 days.
- Unsubmitted: Applicant has started the application, but the information is incomplete and not fully submitted.