

Disadvantaged Communities – Single-Family Solar Homes Program

# 2022 Marketing, Education and Outreach Plan



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# I. Introduction

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## About the 2022 ME&O Plan

The Disadvantaged Communities Single-family Solar Homes (DAC-SASH) program's 2022 Marketing, Education and Outreach (ME&O) plan describes the activities the Program Administrator (PA), nonprofit GRID Alternatives (GRID), will undertake to ensure the success of the DAC-SASH program in the upcoming year, and provides a year-in-review of 2021, the program's second full year of operation. GRID's approach, based on the outcomes of its DAC-SASH program implementation to date, as well as its success administering the Single-family Affordable Solar Homes (SASH) program and other low-income solar programs, combines a recognized brand, community and institutional partnerships, data-driven targeting, and experience-based and flexible marketing and outreach activities.

2022 Contingency: GRID will remain nimble in 2022 as the first DAC-SASH program evaluation takes place. Recommendations from the 3rd party evaluation process with Evergreen Economics will be published in Q3 2022 and GRID will be prepared to adjust its ME&O plan in real time and has informed HQ and regional staff of this. GRID welcomes changes to the program design, in particular those that allow our regional ME&O staff to find and serve eligible DAC homeowners and households more expeditiously.

## About the DAC-SASH Program

DAC-SASH is structured to ensure that (a) low-income families receive impartial, complete information from a trusted source and referrals to complementary programs and services; (b) that savings at the household level are maximized; and (c) that iron-clad consumer protection measures exist in all parts of program operation. All ME&O efforts as well as project installations are orchestrated centrally through GRID (the statewide administrator) and delivered through its California affiliate offices. Experience with income-qualifying single-family programs has shown that consistent advocacy and assistance throughout the entire outreach process--and the lifetime of the solar system--is key to ensuring that language, physical ability, age, digital access, and education level are not barriers to participation and that homeowners can make informed decisions and receive the greatest benefit from their solar system. In communities often targeted by predatory practices, demonstrating investment in long-term household and community benefit is an essential component of the program. GRID's approach ensures that disadvantaged communities reap the financial benefits of installing solar over the lifetime of the systems.

## **COVID-19 Impacts in 2021**

Overview: In 2021, the DAC-SASH program continued to be impacted by the COVID-19 pandemic, but GRID was of course better prepared than in 2020. Whereas in 2020 GRID installed less than 60% of what it had projected, in 2021 GRID was more conservative in its planning and installed 82% of what it had projected (see Table 1 below). The pandemic continued to create numerous challenges for outreach to disadvantaged communities (DACS), particularly to those with the most barriers to access. Shortly after the start of the pandemic, GRID formed an internal Taskforce to advise on and decide what activities would be allowed based on California's advisory system and what safety measures would be taken for those activities to be conducted safely. For example, initially home visits were not allowed, and outreach staff were instructed to conduct outreach fully remote. As the pandemic evolved in 2021, GRID's Taskforce reconsidered guidelines to allow for contactless drop-offs of paperwork to those homeowners more comfortable applying and signing contracts offline. In 2021 GRID was nimble and adapted quickly as federal and state safety guidelines changed.

Financing: After many fruitful conversations with the CPUC and SCE, in Q4 2021 GRID commenced an advance invoicing process with SCE for incentive payments (which cover equipment costs, among other upfront project costs). This 12-month pilot is already proving very beneficial to GRID, so that it is no longer required to front all project costs, sometimes for months at a time.

In 2022: Outreach staff continue to accommodate homeowners' needs where possible, continuing to conduct much of its work remotely and limit contact, while aiming to maintain a presence in the community. In 2022, most activities will be allowed with safety precautions such as masking (indoor and outdoor) and using hand sanitizer. GRID's Taskforce continues to evaluate on a weekly basis how GRID and the DAC-SASH program in California may continue to serve disadvantaged communities in a way that is safe for staff and the community at large.

Table 1: Target compared to Actual Installations in 2021

	<b>2021 Projected Installations</b>	<b>Total 2021 Installations</b>	<b>% of Installations Forecast</b>
PG&E	350	277	79%
SCE	165	145	88%
SDG&E	20	18	90%
<b>Total</b>	<b>535</b>	<b>440</b>	<b>82%</b>

## **II. Review of 2021 Objectives and KPIs**

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GRID identifies seven core objectives in its ME&O plans. These were identified to help launch the program, achieve its participation goals, and maximize the long-term impact for homeowners and households, job trainees and communities as a whole. These core objectives and KPIs will be updated as the program unfolds. In this section we provide a summary of the program's 2021 ME&O objectives and activities, describe key takeaways and provide data on topline metrics or KPIs in 2021 through Q4. The seven objectives are:

1. Develop accessible outreach and promotional materials
2. Conduct broad-based outreach to DACs statewide to meet an installation target of 535 projects
3. Target Highest Need Communities
4. Provide streamlined communication, education, and long-term client support
5. Provide information and educate participants about energy efficiency and complementary programs and services
6. Recruit job training participants, with a focus on JTOs ad job trainees in DACs
7. Keep stakeholders informed about program impact

### **Objective 1: Develop accessible outreach and promotional materials**

Activities consisted of:

- **1.1** Develop initial materials
- **1.2** Collect feedback on materials from partners and homeowners in DACs
- **1.3** Optimize and translate materials
- **1.4** Create large-print versions of materials

**2021 Summary:** This objective is complete for 2021, with marketing materials developed in 2019 and reviewed and approved by the Energy Division in late 2019. Since then, GRID has been disseminating these materials across the state to reach targeted homeowners. Based on our marketing survey results and input from Outreach staff, we modified outreach materials to make them easier to read at a glance. This was particularly important for clearly separating the English and Spanish sections of key materials.

### **Objective 2: Conduct broad-based outreach to DACs statewide to meet a statewide installation target of 535 projects**

Activities consisted of:

- **2.1** Canvassing door-to-door in target communities
- **2.2** Participation in community events
- **2.3** Send mailers to targeted lists
- **2.4** Facebook ads

- **2.5** Media advertising
- **2.6** Media outreach
- **2.7** Distribution of referral materials
- **2.8** Leverage city partnerships to promote the program
- **2.9** Leverage CBO partnerships to promote the program

**2021 Summary:** GRID's outreach efforts for the DAC-SASH program statewide have resulted in a relatively stable pipeline of eligible projects from targeted communities. GRID did not reach the plan's targeted 535 DAC-SASH projects for the year, installing 82% of its initial projection. Some activities such as in-person canvassing or in-person participation in community events were still not back to normal volume in 2021. Staff attended roughly 20 community events (remote and in-person) and continued to promote the program online and encourage direct word of mouth. Considering ongoing pandemic restrictions, GRID considers these results to be aligned with best case outcome, particularly in light of the fact that it was the final year of the SASH program's ME&O. Highlights of outreach marketing and related KPIs in 2021, include:

- Thousands of postcards and mailers were sent to targeted lists in IOU territories. From these postcards and mail campaigns, roughly 350 prescreens were completed through Q4. This excludes mailers executed in collaboration with SCE, which is tracked separately.
- Referrals through GRID's Referral Rewards Program (which pays \$200/referral) continue to play a major role in successful outreach across the state. It again posted strong numbers in 2021, with over 700 referral leads throughout the year.
- GRID leveraged CBO partnerships to drive interested leads to apply to the program, with almost 200 leads prescreened from CBO partners. GRID works closely with affordable housing developers such as Habitat for Humanity's affiliates (with which GRID holds local or regional contracts), Self-Help Enterprises and has received leads from CBOs across the state such as Proteus Inc, Stone Soup Fresno, Community Housing Development Corp. of N. Richmond, Rising Sun Center, Camp Fire Collaborative, Rebuilding Together SD, Watts Rising, and the Central Valley Opportunity Center. Some of these partnerships are not contractual but consist of less formal, joint outreach efforts.

Utility partnership: In 2021, SCE and PG&E both agreed to a new ESA program collaboration, where they receive copies of the DAC-SASH program brochure from GRID and dole them out to their respective ESAP contractors. When onsite for ESAP, the IOU's subcontractors are to leave behind DAC-SASH brochures for homeowners in a DAC to consider the benefits of solar, in particular if they express interest in solar. GRID sent 3,100 brochures to PG&E in 2021 that it disseminated to two implementers and three contractors. GRID sent 30,000 brochure copies to SCE in Q1 2022 which are being included in their ESAP contractors' leave-behind collateral packets.

SCE's partnership with GRID for co-marketing continues to be helpful in supporting client acquisition and raising awareness about the program. SCE links to GRID's program on their website, on their CARE and Solar pages, driving traffic to the program. SCE also collaborates with GRID in sending co-branded mailers and emails to target CARE ratepayers. In 2021 these efforts generated hundreds of leads.

Leveraging city partnerships – In 2021 over 700 leads were prescreened from marketing efforts in cities across the state and of these, 156 were converted to the application phase (a little over 20%). In addition, to fill project funding gaps, GRID leverages additional funding from local jurisdictions. In 2021 we continued to partner with the City of Ontario to promote the DAC-SASH program alongside the Transformative Climate Communities (TCC) program. We are leveraging TCC funding in Fresno as well<sup>1</sup>. In the Los Angeles region, the City of Paramount has included mention of the program on its website and we’re partnering with Long Beach as well. In the Bay Area, GRID continued its successful partnerships with the City of Richmond, City of San Francisco municipal agencies and the City of San Pablo as well.

## Objective 3: Target Highest Need Communities

Activities consisted of:

- **3.1** Conduct outreach in communities with established GRID presence or partnerships
- **3.2** Establish brand presence and provide solar education in new communities through events and media outreach
- **3.3** Develop outreach partnerships with cities and CBOs through direct outreach and education

**2021 Summary:** High-needs communities are those that have been identified by the Commission and State as most in need of investment, many of which are also served by complementary programs and resources. Integrating these communities into the DAC-SASH ME&O plan helps support the Commission’s and State’s goals of program coordination and alignment. The high-needs communities identified as target areas for 2021 were largely the same as those for 2020:

1. San Joaquin Valley (SJV) communities that are part of a PUC proceeding focused on gas and electric access and affordability.
2. Communities or zip codes with the highest electrical service disconnection rates (due to customer non-payment) in each IOU
3. Communities that are part of the Community Air Protection Program (CAPP) set up by the CA Air Resources Board (CARB) in response to AB 617 (C. Garcia, 2017).

Of the 57 high-need communities identified by the CPUC, 27 of these are located in both IOUs and CES DACs and are thus geographically eligible for DAC-SASH, including:

- 10 of the San Joaquin Valley communities
- 7 highest disconnection zip codes (these were not updated in 2021 due to a statewide moratorium on widespread disconnections due to the pandemic)
- 10 of the AB 617 communities

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<sup>1</sup> The Transformative Climate Communities (TCC) program was established by AB 2722 to “fund the development and implementation of neighborhood-level transformative climate community plans that include multiple, coordinated greenhouse gas emissions reduction projects.” It is funded by the state’s Cap and Trade program or the GGRF and its implementing agency is the Strategic Growth Council.

GRID sought to increase and, in some cases, establish an initial presence in these high-need communities in 2020. GRID executed at least one ME&O activity in 16 of the 27 geographically eligible communities. GRID again pre-screened roughly 1,000 leads in these communities. Next, 28 job trainees living in high-needs communities signed up to participate in on-site installations in 2021. GRID continued to increase its presence and provided solar education for homeowners and job trainees in high-need communities that it has not worked in previously with four media outreach hits in 2021. Highlights from 2021 ME&O activities, specific to each category:

**San Joaquin Valley communities:** GRID focused its 2021 DAC-SASH outreach efforts in Le Grand, Fairmead, Ducor, La Vina, and West Goshen. In these cities, GRID continued to coordinate with the SJV pilot project, meeting with RHA once per quarter. GRID received 70 leads and customer information from RHA in the focus communities in 2021 and installed one project in Le Grand in July 2021. Most leads are disqualified due to poor roof conditions, unpermitted structures, code concerns and in some cases lack of interest or time on the client's part; GRID works to overcome these barriers where possible.

**High Disconnection rate communities:** GRID has worked with partners in several of the zip codes with the highest disconnection rates to market DAC-SASH and address barriers to access through additional benefits. In San Bernardino (92401 and 92404 zip codes), GRID continues to partner with Neighborhood Partnership Housing Services Inc (NPHS) and the City of San Bernardino for assistance with roof and other home repairs, in order to make homes solar-ready. The City of San Bernardino's HOME program<sup>2</sup> is administered by NPHS and the program consists of a forgivable loan of up to \$40,000 that has no interest or payments.<sup>3</sup> In Goshen (93227) and Porterville (93258), GRID is partnering with Richard Heath and Associates (RHA), the City of Arvin and Proteus and executed a referral campaign and targeted marketing.

**Assembly Bill 617 communities:** In nine cities GRID marketed, outreached, and built or deepened partnerships, including the following.

- With the City of Richmond, GRID sent hundreds of co-branded mailers.
- In South Central Fresno, GRID continued to provide referral rewards in 2021 and sought to further leverage the TCC program incentive for gap financing.
- A SCE co-branded mailer was sent to residents in Carson, Long Beach and Lynwood.
- In National City and the Barrio Logan/Logan Heights/Sherman Heights area of San Diego, GRID used its new access to SD&E-provided leads to send hundreds of postcards and mailers, participated in several events, and promoted our referral rewards.

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<sup>2</sup> The HOME program is overseen by the U.S. Department of Housing and Urban Development (HUD) and grants states and local government funding to implement local housing strategies designed to increase homeownership and affordable housing opportunities for low and very low-income Americans.

<sup>3</sup> The NPHS roof and home repair program provides loan forgiveness after 10 years if loan terms are met (i.e., still primary residence, home in good repair, not in foreclosure).

## Objective 4: Provide streamlined communication, education, and long-term client support

Activities consisted of:

- **4.1** Pre-qualify homeowners with bilingual intake team, with on-call translation service
- **4.2** Assign outreach staff to provide direct education and support to clients throughout application process
- **4.3** Educate clients on solar, energy efficiency and conservation, solar system maintenance and monitoring
- **4.4** Provide clients post-installation survey, assessing satisfaction with install process
- **4.5** Send clients annual survey assessing long-term program satisfaction

**2021 Summary:** GRID outreach staff provided a fully supported process to program participants, from initial outreach through installation and system interconnection. This approach has maximized the program's impact for participants and remained true in 2021, despite ongoing COVID-19 limitations. In 2021, 1,200 leads were successfully prequalified for the program, which means that they provided all requested eligibility documentation to GRID for review. 34% of those that were prequalified submitted a complete application. Of the remaining 66% of the pre-qualified leads, 181 projects are still active and may submit an application and over 500 were deactivated. The most common reason for lead deactivation continues to be that a home is not solar suitable due to an old or unsafe roof. The second, third and fourth most common reasons for eligible leads to be deactivated were code compliance or electric panel capacity issues (old or small panels), clients declining to participate, and clients being over the DAC-SASH income limit respectively. As shown in Table 3 below, roughly 15% of 2021 program leads have moved forward and have not been made inactive yet.

Table 2: Lead and project status for 2021 program leads

Lead Status	Inactive?	Project Status	% Total	Record Count
In progress			6%	228
Lost Contact			18%	672
Unqualified	Yes		44%	1,636
<b>Qualified</b>	<b>No</b>	<i>Pre-Qualified</i>		<b>181</b>
		<i>Application Approved</i>		<b>91</b>
		<i>Construction Approved</i>		<b>72</b>
		<i>Installed</i>	15%	<b>218</b>
	<b>Yes</b>	<i>Pre-Qualified</i>		529
		<i>Application Approved</i>		93
		<i>Construction Approved</i>	17%	16
		<b>Subtotal</b>	32%	<b>1,200</b>
<b>Total</b>				<b>3,736</b>

Client surveys: To assess the program's impact qualitatively, we send surveys to clients after the system has been interconnected and thereafter, on an annual basis. Of the over 90 "Post-Installation Surveys" completed in 2021, the average client rating on its educational questions (scale of 1-5) was 3.2, which exceeds our goal of 3. The average net promoter score (NPS) is 9.8 (scale of 1-10), exceeding our goal of 6. The NPS is the gold standard of customer experience metrics and measures all aspects of a client's experience going solar with GRID. The NPS rates a customer's likelihood to recommend services to somebody, with 9 or 10 defined as "promoters", 7 to 8 as "neutral" and 6 or below as "detractors".

150 DAC-SASH clients completed GRID's "Annual Survey" in 2021, sent on the anniversary date of the project's interconnection with the utility. GRID includes all client responses, complaints, and feedback in its [semi-annual progress report](#) and is pleased with the high client satisfaction rates. The average NPS score for the annual survey was 8.9 and again there were complaints regarding the confusion that clients experience in receiving or understanding their Net Energy Metering (NEM) annual true-up bill from their utility provider. For families struggling to make ends meet, an annual bill can create financial strain, even with the option to sign up for a payment plan. SCE provides a monthly NEM billing option that helps to alleviate the financial burden of annual NEM bills on low-income customers.

## Objective 5: Provide information and educate participants about energy efficiency and complementary programs and services

Activities consisted of:

- **5.1** Make accessible energy efficiency and conservation information on website and direct homeowners to that information via handouts and automated emails
- **5.2** Refer clients to IOU energy assistance programs

**Narrative:** In 2021, GRID provided DAC-SASH clients with direct education and resources about energy efficiency, including educational handouts with [tips and programs](#) via the GRID website. GRID tracks unique pageviews of our energy efficiency educational webpage, which typically numbers in the hundreds.

GRID also provided direct referrals to complementary programs, in particular to the Energy Savings Assistance (ESA) program. This program helps enrolled clients to maximize the impact of their participation in DAC-SASH by keeping their electric usage and monthly energy costs lower. To date, 34% of over 1,900 DAC-SASH applicants that we've referred to ESAP have been reported as enrolled by the IOUs. The California Alternate Rates for Energy (CARE) program has stronger uptake, with 80% of 1,900 DAC-SASH applicants cross-enrolled in the CARE program. The CARE program gives IOU customers a 30% discount on their electric bill and a 20% discount on their natural gas bill. GRID provides DAC-SASH applicants information about ESAP, CARE and the Family Electric Rate Assistance Program (FERA) and is open to exploring more mutually beneficial partnership opportunities with the IOUs.

GRID believes that disadvantaged communities benefit from a holistic and streamlined outreach approach. We work to connect DAC-SASH participants to complementary programs that can further benefit them. Below are two more examples of such programs:

- GRID initiated a pilot in late 2020 to provide battery storage to households eligible for the Self Generation Incentive Program (SGIP) Equity Resiliency Budget. We hope to provide solar + storage to DAC-SASH clients if eligible for both programs in the future. A hurdle to providing solar + storage to DAC-SASH clients is the lack of overlap between the DAC-SASH eligibility maps and the SGIP eligibility map, aside from some tribal lands. The programs also use different income limits. We anticipate a small number of low-income clients receiving services under both programs.
- In 2021, several GRID clients took advantage of one of our Clean Mobility programs for electric vehicles (EV) or EV chargers. Clients typically received between \$5,000 and \$9,500 towards a plug-in car, depending on which incentive program they sign up for and what kind of vehicle is selected. Most programs include a \$2,000 add-on for residential, level-2 charging. In early 2021, [Lupe Flores](#) received a DAC-SASH system in Fresno within PG&E territory as well as an EV charger and an electric car through Beneficial State Bank.

## **Objective 6: Recruit job training participants, with a focus on Job Training Organizations and job trainees in DACs**

Activities and KPIs consisted of:

- **6.1** Recruit individual trainees from DACs through client outreach channels
- **6.2** Engage existing JTO partners in/serving DACs to provide job training to students
- **6.3** Identify new JTO partners in new communities through direct outreach and education
- **6.4** Maintain and promote resume bank and job board to job trainees as a way to access paid work opportunities
- **6.5** Provide SPP contractors with access to resume bank and job board to facilitate hiring trainees from DACs
- **6.6** Engage employers to hire trainees through GRID's resume bank, job board and employer newsletter
- **6.7** Invite trainees from JTOs located in DACs to participate in free job fairs held by GRID and its partners

**2021 Summary:** In 2021, GRID leveraged its community networks and job training organization (JTO) partnerships to engage 13 residents of DACs in projects and trainings. After an unprecedented cancellation of all in-person training in most of 2020, in 2021 GRID was able to return job trainees to real-world install sites, host virtual job fairs, and continued to make direct connections between trainees and GRID's employer network. GRID hosted 28 virtual and in-person Installation Basics Training (IBT) trainings, allowing us to engage with trainees. In 2021, offices were again required to seek approval from their local municipality to ensure that in-

person trainings do not violate local ordinances. In 2021, each GRID office continued to adapt its job training programming in a way that best suits their unique situation with respect to partner relationships and staff capacity. GRID's workforce development programming has become more sophisticated in recent years, in particular the [IBT-200 program](#).

**Trainings in 2021 consisted of the following:**

- **Central Valley** – Nine 5-week IBT-200 trainings took place, with a total of 50 job trainees receiving instruction in 2021. After offering some distance learning options in the early days of the pandemic, this region has returned successfully to in-person instruction, building a mock training space, including mock roofs and a house that trainees learn on.
- **North Valley** – 158 job trainees received instruction of two kinds in 2021, both virtual and in-person. This office created GRID's online distance learning content in 2020 and completed 14 online training cohorts in 2021. In 2021 they also hosted in-person lab training but with no real-world installation participation due to the ongoing pandemic.
- **Los Angeles** – 55 trainees received instruction in 2021. This region has introduced hybrid cohorts, with the trainees doing classroom lessons online and attending in-person for hands on work in the training lab.
- **Inland Empire** - 33 trainees received instruction in 2021. The office had a thriving internship program pre-pandemic and has shifted interns from installations to remote efforts that support design, outreach, permitting and site visits. The region also adopted a distance learning cohort model.
- **Bay Area** – While just three job trainees received instruction in 2021, it is planning to launch a formal IBT-200 course in 2022 in the second half of the year. Individual interns also participated in installations in the North Coast satellite office in Willits, California.
- **San Diego** - 14 job trainees received instruction in 2021 in three cohorts.

**Trainee Participation:** In 2021 no job trainees were allowed to work on installations due to GRID's ongoing COVID-19 workforce development protocols. 13 job trainees from DACs signed up to participate in a DAC-SASH project in 2021, logging 600 hours of participation on DAC-SASH projects in design and/or project management capacities since in-person direct installation hours were not permitted in 2021 due to the ongoing pandemic.

**Job Training Organizations:** In 2021 six new JTO partners were brought onboard, with regional offices building new partnerships with the expectation of trainings in the future. New partners were located across the state including the YMCA of San Francisco, Paving the Way in Los Angeles, and Bitewise Industries in the Central Valley. GRID has active relationships with 50+ job training and CBOs in California, 27 of which are located in DACs. Since the program began, GRID has partnered directly with over 25 JTOs of which ten have offices located in a DAC.

**Employers:** In 2021 there were 40 active non-SPP employers on GRID's resume bank from its Subcontractor Partnership Program. GRID added 40 individuals from potential employers to the quarterly employer newsletter, for a total of 130 employers subscribed to GRID's employer newsletter. This means that GRID is indeed engaging with employers, but again in 2022 it will

work to improve the quality of this engagement and ideally translate this to trainee job placements.

**Jobseekers:** In 2021, six individuals located in a DAC signed-up for GRID's resume bank and there were over 130 job board views overall, but no jobs posted. As of the program's July progress report, GRID estimates that over 190 DAC-SASH job trainees or volunteer participants have secured longer-term paid employment after working on a DAC-SASH project between 2019 and 2021. As the state recovers from the pandemic, DAC-SASH workforce development requirements can play a role in training individuals seeking employment opportunities.

## Objective 7: Keep stakeholders informed about program impact

Activities consisted of:

- **7.1** Solicit input from stakeholders through direct inquiry and community forums
- **7.2** Maintain a page on GRID website describing program and linking to reports and data
- **7.3** Media/storytelling specific to DAC-SASH

**2021 Summary:** Key stakeholders for the DAC-SASH program include the CPUC Energy Division, the Disadvantaged Communities Advisory Group (DAC-AG), California IOUs, Job Training Organizations (JTOs), Community-Based Organizations (CBOs), utility ratepayers, and residents of DACs across the state. Through this annual plan, twice per year progress reports, and reporting on California Distributed Generation Statistics' website, GRID keeps all interested parties informed on the program's progress and challenges.

In 2021 GRID engaged stakeholders through community engagement, program education, and the CPUC regulatory process as well. We submitted one Advice Letter to update the program handbook to its third edition; one notable update was to accommodate income changes on clients' 2020 or 2021 tax returns due to unemployment income that they may have received. Next, the program page on GRID's website receives hundreds if not thousands of pageviews each year, demonstrating strong interest in the program.

### **III. Key Program Audiences**

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#### **Low-income homeowners located in DACs**

The primary audience for the program is low-income homeowners living in disadvantaged communities (DACs). To qualify for DAC-SASH, homeowners must live in one of the top 25 percent most disadvantaged communities statewide using the CalEnviroScreen, be a billing customer of one of the state's IOUs and meet income qualifications as denoted by the income guidelines of either the California Alternate Rates for Energy (CARE) program or the Family Electric Rate Assistance (FERA) program. The target communities for the program are diverse, with most common languages including Spanish, English, Mandarin, Cantonese, Korean, Vietnamese, and Tagalog. This program audience needs simple, clear and compelling information about the program in languages they understand and from messengers and channels they trust, as well as ongoing education and support.

There are multiple, additive barriers to reaching this diverse audience that GRID's ME&O efforts address, including lack of trust, lack of exposure to solar technology, distrust of solar companies, limited time to commit to learn about solar and the benefits of the program, and the complexity of net metering and billing. In addition, the cultural diversity of this audience calls for targeted and customized ME&O, which can be challenging with limited resources and budget.

There are also structural barriers outside the scope of ME&O, such as roof condition, unpermitted structures and the need for electrical upgrades that can limit the pool of eligible homeowners, especially in communities with older housing stock. As outlined in Objective 4 above, the drop-out rate for lack of solar suitability across the state is roughly 30% – with much higher drop-out rates in urban areas with older housing stock. As GRID implements the DAC-SASH program, experience is showing that disadvantaged communities often have more structural barriers than non-DAC areas, because homeowners in these areas are financially challenged to properly maintain their homes.

#### **Tribal communities**

GRID has worked with tribal communities across California to promote the SASH program in the past and is now beginning to promote the DAC-SASH program as well to eligible tribal land communities. Along with the highest-needs communities identified by the Commission as a priority for the program, tribal communities are also high-need communities and experience high rates of disconnections. In 2022 GRID will continue work to promote the DAC-SASH program to eligible tribal communities. However, GRID has no TPO or third-party financing for Tribal projects to supplement the program incentive; this makes fully funding the projects more challenging. In the meantime, GRID will apply for Department of Energy federal grants as well as other grant programs that may be available to make up the financing gap for tribal projects.

Per the D. 20-12-003, California Indian Country (where projects will be eligible for DAC-SASH) is defined as:

“All California Indian Country as defined in 18 United States Code Section 1151, with the exception of privately held in-holdings, which are defined as non-Indian owned fee land located within the exterior boundaries of California Indian Country; in the event of multiple owners, such land shall be considered Indian owned if at least one owner is a tribe or tribal member, regardless of the use of the land.”<sup>4</sup>

### **Job trainees**

GRID recruits job trainees from both the general public and through job training partners, including local job training organizations and community colleges. Barriers to participation may include language, technological barriers to accessing information about training opportunities (particularly prescient during the pandemic when much of GRID’s programming shifted to distance learning), lack of financial resources to engage in unpaid training, lack of transportation to and from job sites, and distrust. This audience benefits from clear and compelling information on the opportunity and resources available to them from a party and channel they trust and needs support to address individual barriers to ongoing participation.

### **Other key stakeholders**

DAC-SASH stakeholders include the CPUC Energy Division, California’s Investor-Owned Utilities (IOUs), Job Training Organizations (JTOs) located in DACs, Community-Based Organizations (CBOs) around the state, utility ratepayers, Community Choice Aggregators (CCAs), and residents of DACs across the state. This audience seeks access to data, information about program progress and impact, and mechanisms to provide program input and feedback.

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<sup>4</sup> D.20-12-003, pg. 7

## **IV. Strategic Approach**

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In 2022 and beyond, GRID aims to further grow its ME&O and construction capacity in the Central Valley (CV) where many DACs are located, as well as potentially in other less urban parts of the state. This shift will take time but is something that GRID will begin working on in 2022 as COVID-19 dissipates and so too the many disruptions it caused. To this end, future program invoices may project more billing by GRID's CV, Inland Empire and/or North Valley regional staff and perhaps less billing in high cost of living regions where it is challenging to find eligible program participants.

### **Holistic Approach with Focus on Trust-Building**

GRID's holistic community and customer-centric approach addresses marketing, education and outreach barriers using strategies that have proven to be successful working with low-income households. Much of GRID's expertise was developed over the last decade administering the SASH program throughout California. With its affiliate offices across the state, GRID combines direct, in-community, in-language outreach and education with community and local government partnerships to ensure program information is reaching eligible households through a trusted source. Building trust is critical in communities that may view these programs as "scams" or as "too good to be true" as a SASH program evaluation report noted.<sup>5</sup> Educational messages are reinforced by a robust referrals program and accessible digital resources and platforms.

Once a client has been approved for participation, they receive dedicated, ongoing support from outreach and construction staff from application to installation and interconnection, as well as referrals to complementary state and local programs, including the Energy Savings Assistance Program (ESAP), CARE, and FERA. Following installation, GRID and its Third-Party (TPO) partners provides ongoing education and engagement, solar production online monitoring, and access to phone support and troubleshooting throughout the expected life of the solar electric system.

### **Focus on Direct Mail, Word-of-Mouth, and Partner-Based Marketing**

In 2022 GRID will increase its direct mail budget and increasingly focus on this outreach activity. This will be especially important given social distancing, which makes other forms of outreach such as canvassing and event participation more difficult or impossible in some cases. In 2022 we will also continue to focus on word-of-mouth as a highly effective marketing tool, coupling an on-the-ground presence with enhanced partnership-based marketing. GRID has found that partnering with a trusted community organization on marketing helps address challenges with client trust. Not only does working with trusted CBOs, community leaders, local agencies and other service providers helps overcome trust and education barriers, it can help address structural barriers by layering ancillary services like electrical upgrades and roof repairs. This collaborative, partner-based approach has proven successful in addressing barriers to participation in DACs.

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<sup>5</sup> Market and Program Administrator Assessment (PY 2011-2013), p.53

## **Financial Tools for Gap Financing in DACs**

GRID's nonprofit status enables us to address barriers to solar outside the scope of ME&O, such as our ability to eliminate financial costs and credit score barriers for participants. We do so in many cases by supplementing the program's incentive funding with private or philanthropic dollars or complementary state and local funding streams to help address structural barriers such as roof condition and the need for electrical upgrades. This increases the applicant pool and ensures that clients at the lowest income can participate in the DAC-SASH program. GRID will continue to make this a major focus in 2022.

## **Alignment with Statewide ME&O Efforts**

The State and Commission have made investments to ensure that the ME&O efforts of multiple programs related to energy efficiency and energy education for California ratepayers are coordinated, and thereby have the maximum impact on driving behavioral changes. Decision 16-03-029 envisions a statewide ME&O effort that drives participation into local/regional programs. To this end, GRID will continue working with California IOUs to ensure that DAC-SASH is integrated and aligned with statewide ME&O efforts. GRID engaged with the administrators of the Self-Generation Incentive Program (SGIP) to help determine program eligibility processes and is coordinating with the IOU's CARE/FERA and ESAP program contacts on program referrals to GRID.

This alignment effort has become particularly relevant to client education about time-of-use (TOU) rates and to enrollment in complementary programs such as ESAP and CARE. Because current Net Energy Metering (NEM) rules require DAC-SASH clients to move to a TOU rate, GRID is working to provide more education about TOU and will leverage the IOUs' informational materials on TOU where available. GRID has observed that low-income clients are often more challenged than other customers in moving to a TOU rate, because they lack the flexibility or knowledge required to modify their electric consumption patterns in response to peak or high-cost times of day.

## V. Installation Targets in 2022 and Continued Challenges

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In 2022 GRID estimates higher project volume compared to 2021, due to its shift away from SASH ME&O and more capacity for the DAC-SASH program. The 2022 SDG&E installation target continues to be low due to the proven difficulty finding eligible homeowners in the utility territory; this is true even accounting for the inclusion of tribes into the program at the beginning of 2021.

### Installation Targets in 2022 and Beyond

Table 2 details the incentives spent and installed projects through Q4 2021, as well as the estimated project count by IOU and estimated capacity for the remainder of the program life through 2030. This is based on the program's budget and experience through 2021 marketing, outreaching, and installing in DACs statewide.

Table 3: Incentive Funding and Installation totals

	Incentives Claimed	Installed Projects	Installed Capacity <sup>6</sup>	Total Incentive Funding	Incentives Remaining	Remaining Estimated Capacity <sup>7</sup>
	(2019 - 2021)			2019 - 2030	(2019 - 2021)	
PG&E	\$8,240,205	748	2.75	\$44,574,000	\$36.33m	12.11
SCE	\$4,207,468	372	1.40	\$46,920,000	\$42.71m	14.24
SDG&E	\$413,643	39	0.14	\$10,506,000	\$10.09 m	3.36
<b>Total</b>	<b>\$12,861,316</b>	<b>1,159</b>	<b>4.29</b>	<b>\$102,000,000</b>	<b>\$89,138,685</b>	<b>29.71</b>

Table 3 below illustrates GRID's expected installations in 2022. GRID highlights the low project count in SDG&E projected again, which will utilize a small percentage of the annual incentive funding in that utility territory. This is due to the resources needed to identify eligible homes in the service territory, as further detailed in the following "Continued Eligibility Limitations in SDG&E territory" section.

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<sup>6</sup> In megawatts (MW) CEC-AC

<sup>7</sup> Ibid

Table 4: 2022 Installation Targets for DAC-SASH

	<b>Estimated Incentives</b>	<b>Average System size kW, CEC-AC<sup>1</sup></b>	<b>Estimated # of Installations</b>
PG&E	\$3,896,400	3.82	340
SCE	\$2,808,000	3.90	240
SDG&E	\$462,000	3.85	40
<b>Total</b>	<b>\$7,166,400</b>		<b>620</b>

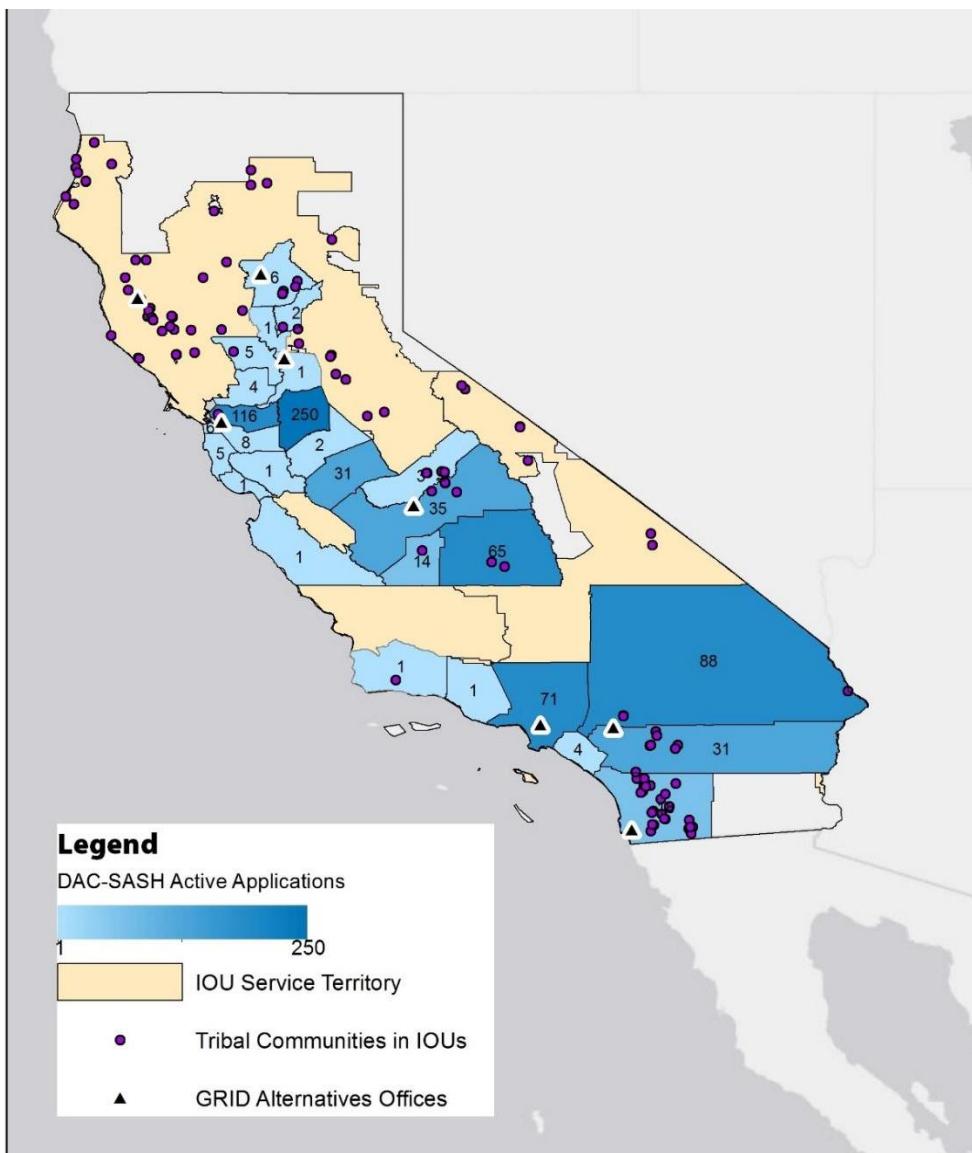
<sup>1</sup>Average system size is calculated based on GRID's single-family installations in each IOU service territory.<sup>2</sup>

#### **Geographic Scope in 2022 is similar to 2021 scope**

Map 1 below shows the location of GRID's regional offices, IOU territories, and DAC-SASH applications by county. Five of GRID's six regional offices and two satellite offices are located in a CalEnviroScreen (CES) DAC, an established on-the-ground presence that facilitates program uptake. In 2021, GRID received and approved over 400 applications from eligible DAC-SASH households, with the majority of approved DAC-SASH applications located in PG&E and SCE service territories. GRID will continue to expand its focus to tribal lands and communities, in line with Decision 20-12-003. It plans to install over 40 tribal DAC-SASH projects in 2022, as it deepens tribal partnerships around the state via events, advertisements, word of mouth, and more.

GRID will also continue to leverage its existing partnerships in communities where it has established a presence and continue to expand operations to new.

**Map 1: DAC-SASH Applications by County, IOU Territories, and Tribal Communities**



### Continued Eligibility Limitations in SDG&E

In 2021 the program's eligibility barriers in the San Diego region were again stark. The geographic limitation of CalEnviroScreen DACs and the income eligibility limits make it such that GRID's broad outreach and marketing efforts have been unsuccessful in acquiring sufficient qualified applicants to utilize SDG&E's annual DAC-SASH funding. At the end of 2021, there were:

- 39 projects installed through 2021 (program year 3) and less than \$415,000 in incentives claimed. Less than 16% of the Year 1-3 incentive funding has been encumbered to date.
- 9 projects in the pipeline

- 7 projects had reserved incentives that were awaiting installation and
- 2 applications were under review.

In SDG&E, only 37 census tracts are in the CES compared to 356 in PG&E and 655 in SCE. The census tracts in SDG&E that meet the CES qualification represent less than 5% of SDG&E territory. In those 37 census tracts the rate of homeownership is lower than in other census tracts, further limiting market potential. Based on available data, GRID estimates that there are fewer than 3,000 low-income homes in SDG&E that meet the geographic eligibility for DAC-SASH and GRID expects that at least 50% of these homes will not be eligible because they are not owner-occupied or are not solar-suitable due to shading, roof condition or code issues.

In addition to these geographic limitations, the statewide income limits further restrict participation in San Diego, where the cost-of-living is higher than in less urban areas. Other areas of the state such as the Bay Area and Greater Los Angeles are also experiencing a high rate of disqualification because of the program's CARE/FERA income benchmark. GRID has determined that there are not sufficient homeowners who meet the definition of low-income and own solar-suitable homes who reside in a CES DAC to use the allotted incentive funds in SDG&E territory, even when accounting for the inclusion of Tribal Lands.<sup>8</sup>

GRID's PFM of Decision 18-06-027 resulted in Decision 20-12-003 in December 2020. The Decision's directives were welcome in SDG&E territory, as tribal lands are now eligible as well.

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<sup>8</sup> To see maps that GRID created to highlight these program limitations in the San Diego region, see the DAC-SASH PFM that was submitted in April 2020 to the CPUC.

## **VI. Program Objectives in 2022**

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### **Goals for Marketing, Education and Outreach**

The DAC-SASH ME&O plan delineates activities and objectives for 2022, which we still expect to be affected by the pandemic, albeit far less than in 2020 and 2021. GRID's ME&O goals are to build a more robust applicant pipeline with clients representing the diversity of California's population and geography, and to ensure a positive client experience that continues to build trust in the program. In 2022, GRID will mix remote outreach approaches such as phone-banking and in-person events where it is safe to do so. The program will operate similarly in 2022 as it did in 2021 but with increased ME&O capacity due to the legacy SASH program no longer taking new applications.

The program's 2022 ME&O Objectives are:

1. Assess outreach & promotional materials, especially given enhanced remote and digital outreach required in 2022
2. Conduct outreach to DACs statewide to meet an installation target of 620 projects
3. Outreach to tribal and San Joaquin Valley (SJV) pilot communities
4. Provide streamlined communication, education and long-term client support
5. Educate participants about energy efficiency and provide information about complementary programs and services
6. Recruit job training participants, with a focus on JTOs and job trainees in DACs
7. Keep stakeholders informed about program impact and evaluation

### **Objective 1: Assess outreach & promotional materials, especially given enhanced remote and digital outreach in 2022**

GRID will continue to assess the promotional materials developed for DAC-SASH and identify opportunities for improvement or changes to be better positioned for mixed remote and in-person outreach in 2022. This assessment will take place as we receive feedback from program participants and partners, and as clients' needs evolve. We are currently testing a co-branded CPUC letter and will likely debut other new promotional materials in 2022. We expect that providing some services remotely will be necessary in early 2022, and potentially longer.

## **Objective 2: Conduct outreach to DACs to meet an install target of 620 projects**

GRID will continue to identify and outreach to qualified leads in DAC communities statewide. Given lessons learned from the second full year implementing the program, our installation target for 2022 is 620 installations, which is less conservative than our 2021 goal but more conservative than our 2020 target. GRID will continue to conduct outreach to households and job trainees throughout DACs, employing a combination of direct and indirect outreach by GRID's multicultural and multilingual staff. GRID will continue to rely on key partners – municipalities, IOUs, CBOs and others – and referral reward programs to promote the program to qualified clients. GRID will be flexible and nimble in order to adapt to shifting needs.

New in 2022: In addition, in 2022 GRID will focus in the SDG&E territory on two tactics aiming to increase program uptake there: 1) Outreach to tribal liaisons in order to boost the volume of tribal households applying for the program and 2) Try new outreach tactic to convert SDG&E-provided leads, such as phone-banking to these leads for example (which was tried in PG&E territory in 2021 with some success). Finally, in 2022 GRID's Outreach headquarters team will work to create an online application tool that ties into Access Clean California and can be used by Outreach Coordinators or clients directly (self-serve) to help alleviate data entry for staff and to ease the burden for the clients providing their information to various parties. Once ready, GRID will then test to determine its usefulness for this program and for complementary programs that ask for similar information of low-income households.

### **Direct Outreach**

Outreach staff in GRID's California offices will undertake multiple kinds of outreach efforts, distributing DAC-SASH marketing materials to prospective clients in targeted communities. Direct outreach in a target community is often paired with indirect outreach such as media campaigns, as well as partner-based outreach to maximize exposure and build trust. Planned direct outreach activities in 2022 include:

- Mixed in-person and digital outreach: Some of the planned strategies include more phone calls and check-ins to warm leads, as well as identifying which households are comfortable using email for correspondence and/or applying online.
- Mixed virtual and in-person events – GRID staff will participate in virtual community events to increase awareness of the program, provide resources and materials, answer questions, and promote solar and workforce development opportunities.
- Direct mail – GRID will continue to use the Faraday data service to generate lists of potentially qualified households and conduct direct mail campaigns to promote program participation. In addition, we will partner with local organizations and government agencies on co-marketing opportunities (see Partner-based outreach, below).

## **Indirect Outreach**

- Advertising – Because of the high cost per qualified lead, advertising will be targeted and used sparingly. The use of this strategy in 2022 will again be limited.
- Earned media – This will be limited in 2022 but could include direct pitches to media outlets and occasional media events with local officials, businesses, and community leaders.
- Social media – GRID will drive traffic to our lead generation web pages and intake phone numbers through organic engagement with GRID's network of over 44,000 social media followers. Additional opportunities to leverage free social media tactics will be explored. Channels for local engagement include Facebook and LinkedIn (primarily for job training) and in 2022 GRID will share program-related reminders and announcements.
- Referral Rewards program – We will continue to market our \$200 Referral Rewards Program<sup>9</sup> (along with partner referral rewards, when available) to existing clients who live in a DAC. In the past, we have been successful with direct mail referral marketing and will continue the strategy in 2022, as well as some email marketing and promoting the referral program via handouts and word-of-mouth.

## **Partner-based Outreach**

- City partnerships – Marketing and outreach efforts in partnership with municipalities will be a continued focus in 2022. Each partnership is unique and may include co-branded mailers, community workshops, virtual or socially-distanced resource fairs or other city events, and communication channels where targeted communities may be present.
- Community-based Organization (CBO) partnerships – Leveraging existing partnerships and developing new ones with CBOs who are trusted partners in target communities will continue to be a focus in 2022. Examples of strong CBO partners include Self-Help Enterprises, Inc., Habitat for Humanity, Stone Soup Fresno, Rising Sun, and Community Housing Improvement Program. Partner activities may include direct referrals, distributing marketing collateral, social media promotion, and inclusion in events.
- New partners – A new local partner is Quality Conservation Services (QCS) an ESA subcontractor in Los Angeles and the Bay Area from whom GRID receives warm or qualified leads and pays for those that turn into installed projects (ten to date). GRID is also working with the Travis Credit Union in the North Valley, with which GRID has an MOU for marketing and outreach. To date this has resulted in one installation, but email campaigns to their members in the N. Valley and Bay Area are ongoing, including to individuals utilizing the credit union's Eco-friendly loan for home renovations/repairs.
- Co-marketing with IOUs – GRID has successfully collaborated with SCE's Customer Programs & Services department to promote the SASH and DAC-SASH programs since 2019. SCE has sent co-branded marketing to thousands of CARE customers in targeted cities and included information and links to GRID's web forms on their website. SCE has been a steady collaborator for three years and the partnership has been instrumental in raising awareness about both the SASH and DAC-SASH programs and in creating some strong leads. GRID will continue this co-marketing partnership into 2022, however this

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<sup>9</sup> GRID's Referral Rewards program is funded out of our organization's budget and does not allocate the DAC-SASH program's administrative or marketing and outreach budgets toward this initiative.

year it may have a new focus on email co-marketing as opposed to print or mailers due to SCE's budgetary priorities or new strategy. Finally, in 2022 PG&E will send one or two batches of DAC-SASH mailers on behalf of GRID and the program, in order to take advantage of its well-known brand and name to help promote the program.

Below is a matrix summarizing planned outreach activities related to Objective 2.

Matrix 2: Outreach to DACs statewide, refining remote outreach technique and tools

Activity	Channels/ Tools	Audience(s)	Conversion metric	KPI(s)
<b>Mailers to targeted lists</b>	Print collateral	Homeowners in qualified DACs	Homeowners follow up for prescreen	# prescreens completed where Lead Source = List Acquisition (Mailer)
<b>Promote referral rewards:</b> -Direct mail marketing -Email marketing -Direct requests	Print collateral  Email  Phone	Homeowners in DACs	GRID clients and partners refer others; Homeowners get pre-screened	# prescreens completed where lead is identified as referral
<b>Leverage City partnerships to promote the program</b>	Print collateral, direct mail & communication channels (like email), events	Homeowners in DACs	City partners promote program to residents; Homeowner gets pre-screened	# of city partnerships; # prescreens completed in target city during promotion period
<b>Leverage CBO partnerships to promote the program</b>	Print collateral, email, social media, events	Homeowners in DACs	CBO partners market the program to their networks.	# and # prescreens completed where lead is identified as CBO partner
<b>Participate in community events</b>		Homeowners and job seekers in DACs	Homeowner and job seekers provide contact info	# leads (trainee and homeowner) entered into Salesforce where Lead Source = Event

## **Objective 3: Outreaching to Tribal Lands and San Joaquin Valley (SJV) pilot communities**

In 2022 GRID will shift its focus in high-need communities, previously identified by the Commission and the State as those in most need of investment. These areas will now include tribal lands and SJV communities only, in order to focus energy, cost and time where outreach staff can be more successful in enrolling households for the DAC-SASH program. Where GRID has an established presence it will qualify households, recruit job trainees and conduct installations in 2022. We will continue to build partnerships, in particular with tribal partners with whom we have lost contact or with whom we seek a stronger partnership. This will promote the program and lay the groundwork for client acquisition in new communities, focusing on successful outreach tactics outlined throughout this plan.

The high-need community categories listed below, have been identified by GRID as areas in particular need of a PV system through the DAC-SASH program due to electrification projects and often large residential loads in tribal communities.. The two community categories are:

- San Joaquin Valley (SJV) communities that are part of a PUC proceeding focused on gas and electric access and affordability
- Tribal lands as defined in D.20-12-003 and illustrated on the CES 4.0 DAC map<sup>10</sup>

**San Joaquin Valley (SJV) Pilot Communities** - Ten of the San Joaquin Valley cities are located in IOUs and CES DACs and so are eligible for DAC-SASH. Solar-suitable homes are limited in many of these communities and the rate of homeownership is low, therefore in 2022 GRID will focus on areas where it identified solar-suitable homes in 2021. We plan to focus on Le Grande, Fairmead, Ducor, La Vina and West Goshen. GRID will also continue coordination with the administrator of the SJV pilot programs, Richard Heath and Associates (RHA), to ensure community members receive information about the DAC-SASH program, in particular if they have a solar-suitable home and roof (which is typically a small number of homes in SJV).

**Tribal Lands** – In 2021 GRID installed 27 tribal projects for four Reservations, totaling over 100kW in electric capacity. The projects were installed outside of San Diego for the Campo Band of Mission Indians and Manzanita Band of the Kumeyaay Nation, near Bishop for the Bishop Paiute Tribe, and for the Round Valley Indian Reservation in Mendocino County. In 2022 GRID aims to install over 40 PV projects on tribal lands and to deepen those partnerships where possible.

**Limitations to serving these communities** - As GRID noted in its two previous ME&O plans, the annual nature of the program's incentive budget limits ME&O potential in high-need communities. DAC-SASH funding is especially limited in PG&E territory compared to demand and is likely to be a limiting factor in reaching many areas of the service territory. The program provides limited outreach and incentive dollars that must be used across DAC communities statewide. By necessity GRID must operate in areas where additional funding resources have

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<sup>10</sup> Temporary CES 4.0 map of DACs and tribal lands in California

<https://oehha.maps.arcgis.com/apps/instant/minimalist/index.html?appid=b2a617f0e8984f3b96d8156bf968a36d>

been identified, such as funding from the TCC program. GRID applied this financing source in 2021 along with additional private or municipal/county resources where available, to address financing gaps and barriers to solar such as old roofs or electric service panel upgrades. In 2022, GRID will continue to utilize TCC funding combined with DAC-SASH incentives in the Inland Empire and San Joaquin Valley.

Below is a summary of activities GRID will pursue in 2022 to acquire clients and deepen partnerships in California's Tribal lands and SJV communities.

#### Matrix 3: Continue Outreaching to Highest Need Communities

Activity	Channels/ Tools	Audience(s)	Conversion Metrics	KPI(s)
<b>Conduct outreach in communities with established GRID presence/ partnerships</b>	Multiple: See Objective 2 tools	Homeowners and tribal members	Homeowners are prescreened	# of lead prescreens in target community
<b>Job trainee outreach in communities with established GRID presence/ partnerships</b>		Job seekers in DACs and tribal lands	Job seekers enrolled in GRID training programs	# of trainees signed-up for training in target community
<b>Partnerships with cities and CBOs through direct outreach and education</b>	Co-marketing, virtual events	Cities and CBOs in DACs and tribal lands	Targeted cities and CBOs agree to partner	# of target cities/CBOs that agree to partner
<b>Outreach to tribal communities</b>	Based on each Tribe	Tribal Members	Installed tribal homes or new tribal partners connected with	# of lead prescreens in tribal communities

## **Objective 4: Provide streamlined communication, education, and long-term client support**

GRID's approach will continue to be based on long-term engagement in the communities that we serve. We will provide a fully supported process for clients from initial outreach to installation and beyond, maximizing impact for participants. One way we will seek to do so in 2022, is by building an online application tool that ties into Access Clean California and can be used by Outreach Coordinators or clients directly (self-serve) to help alleviate data entry for staff. Once ready, GRID will test it to determine its usefulness for this program and for complementary programs that require similar information of households. Key elements in 2022 will include the following as they were in 2021 as well:

**Centralized Intake Team** – GRID's client Intake team handles web inquiries as well as inbound phone calls. The Intake Team prequalifies prospective single-family homeowners and carefully explains to prospects the requirements of the DAC-SASH program. The Intake Team staff can be reached easily and is English-Spanish bilingual. For prospective clients who are more comfortable communicating in another language, GRID employs an on-call translation service. Qualifying information for each potential client is captured by the Intake Team in our CRM Salesforce database. This team is managed centrally, and prospective clients who are successfully pre-qualified are connected directly to our Outreach Coordinators in each region to complete the application process.

**Local Outreach Staff** – GRID's outreach staff has a continued presence in the communities we serve (albeit primarily virtual due to the pandemic at this time) and is able to immediately pre-qualify homeowners. Our multicultural staff offers a flexible, personalized outreach experience that ensures equitable access to the program regardless of race, abilities, age, language, culture, gender identity, educational attainment, or technological savvy. GRID also provides accommodations to reduce barriers to participation to individuals that are deaf/hard of hearing and blind/vision impaired, as well as clients with physical disabilities, limited mobility, cognitive or psychiatric impairments or have transportation challenges. Once a prospective client has been prequalified, regional outreach staff provide support, education, serve as liaisons as well as advocates for each client through the application process. This support, education and advocacy continues throughout the multi-step installation process as well after the solar project is interconnected.

**Client Education and Support** - Outreach staff activities include community and household outreach; solar and energy efficiency education; referrals to complementary programs (see Objective 5, below); application support; review of solar designs and site plans; extensive remote assistance and education with contract review including terms and conditions of a third-party ownership contract (when applicable); education on system monitoring and maintenance; energy bill interpretation; and ongoing post-installation support and education.

**Focus on Access due to the Digital Divide** – COVID-19 has amplified the digital divide that exists in DACs, as some of the communities served by GRID are those with the least access to technology. It is common for a lower income household, particularly in rural areas, to have limited or no access to the internet and unreliable cell service. Some households do not have access to a computer or a smartphone. The magnitude of the digital divide has been amplified by

the pandemic and risks excluding some of our most vulnerable target communities. In 2022 GRID will work to mitigate technological barriers and ensure equitable access to the DAC-SASH program.

**Client Feedback** – GRID takes both a quantitative and qualitative approach to the DAC-SASH program. Measuring homeowner's experience and satisfaction with the program is crucial in assessing the qualitative and depth of impact of the program. This measurement is achieved via two surveys. The first is sent after the system has been interconnected (i.e., post-installation) and the second survey on an annual basis to assess long-term program satisfaction. Both surveys are an opportunity for homeowners to rate their experience with GRID by way of a Net Promoter Score, comments and feedback on the program that can help identify opportunities for improvement and deepen program impacts. Survey results are presented in the program's Semi-annual progress reports to the CPUC and here in the annual ME&O plan as well.

**Long-Term Client Support** – Continued support and assistance after the installation must be part of a client's journey to ensure a positive experience and achieve the deep community impact envisioned by the DAC-SASH program. In addition to the tailored approach taken by outreach staff, GRID will continue to provide a centralized, multilingual phone and email system, to streamline service calls or maintenance questions. To this end, in 2020 GRID implemented a new and improved system for logging and tracking all service calls. Finally, educational information is made available on GRID's website and via email communication to reinforce the education and support provided by outreach staff. All communication and educational materials are designed to be understood by a variety of education levels, available in multiple languages and offered in a variety of accessible print.

Below is a summary matrix of the activities GRID will undertake to provide streamlined communication, education and long-term client support.

Matrix 4: Streamlined Communication, Education, and Long-term Client Support

Activity	Channels/ Tools	Audience(s)	Conversion Metric	KPI(s)
Pre-qualify homeowners with bilingual intake team with on-call translation service	Web and phone	Homeowners in DACs	Homeowners are successfully prequalified	# of Prescreened Leads from Intake

<b>Outreach staff to provide direct education and support to clients throughout the application process</b>	Phone/email/print collateral/in-person as needed in 2021	Homeowners in DACs	Prequalified homeowners complete the application process	# and % of pre-qualified clients who complete an application and provide eligibility documentation
<b>Educate clients on solar, energy efficiency and conservation, solar system maintenance and monitoring</b>	In-person/phone/email/print collateral	Clients	Clients indicate understanding of subjects	Average client rating on post-install survey educational questions >3 (scale of 1-5)
<b>Provide clients with post-installation survey assessing satisfaction with solar installation process</b>	Email, in-person	Clients	Clients complete the survey	Survey average rating; Net Promoter Score > 6.
<b>Send clients annual survey assessing long-term program satisfaction</b>	Email	Clients	Clients complete the survey	Survey average rating; Net Promoter Score > 6

## **Objective 5: Educate participants about energy efficiency and provide information about complementary programs and services**

GRID provides clients with energy efficiency education and referrals to complementary programs to maximize the impact of their participation in DAC-SASH. In 2022 GRID will continue to include energy storage, electric vehicle (EV), EV charger services or other programs into its information dissemination as appropriate based on the home and the household.

**Education about Energy Efficiency and Conservation** - Information about energy efficiency and conservation allows clients to benefit the most from their solar energy systems and understand how their behavior can impact energy bills and savings. Our goals include changing perceptions about energy production and use, teaching participants the importance of conserving energy to reduce energy costs and prevent greenhouse gas emissions and improving understanding of time-of-use rates to maximize savings. While GRID provides this information, it is up to the client whether this knowledge is applied in their household.

**Referrals to and provide information about Complementary Programs** - Many GRID participants qualify for other renewable energy and related programs offered by the state or other

entities. Outreach staff provide referrals to, and information about, the following programs, where applicable:

*Energy Assistance Programs* - GRID's outreach staff provides information to all clients about utility-administered California Alternate Rates for Energy (CARE), Family Electric Rate Assistance (FERA), and the Energy Savings Assistance (ESAP) Program. Outreach staff introduce clients to these programs, encourage enrollment for enhanced energy and cost saving benefits, and GRID also centrally refers clients directly to the IOUs' ESA program.

*Clean Mobility Programs* - In 2022 it will again be a goal to serve DAC-SASH clients with clean mobility or EV charger services offered by GRID. GRID administers low-income EV programs for the CA Air Resources Board and for the Bay Area Air Quality Management District. GRID is working to ensure that DAC-SASH participants receive accurate information about and are referred to EV programs that can provide access to another cost-saving technology. GRID continues to finetune its process to facilitate referrals between programs and logistics coordination, including hiring on staff to more fully manage clean mobility services and funding. We aim to expand layered offerings when eligibility aligns, to make EVs and EV infrastructure affordable and accessible to DAC homeowners.

*Self-Generation Incentive Program (SGIP)* - In late 2019, Decision 19-09-027 enabled households that qualify for DAC-SASH to also qualify for the SGIP Equity and Resiliency budget (ERB) and its incentives for energy storage. GRID continues to work with its primary TPO partner, Sunrun, as well as Swell to explore better integrating battery storage into its PV-model. The biggest hurdles to providing battery storage to existing and future DAC-SASH participants is the minimal overlap in eligibility between the two programs. The program uses different qualifying income limits compared to DAC-SASH and then the DAC-SASH program's eligibility maps and the SGIP ERB eligibility map are almost the inverse of each other, (other than for tribal lands).<sup>11</sup> For these reasons we anticipate a small number of DAC-SASH clients receiving services under both programs in 2022.

*Additional Services* - Depending on the resources available in California regions, GRID's Outreach and Intake Teams may refer participating homeowners to other programs such as re-roofing or rehab programs, legal assistance programs, food assistance, social services and more. Every household is unique and providing resources that meets a household's needs is integral to our client-centric approach.

Below is a matrix summarizing activities GRID will undertake to educate participants about Energy efficiency and Complementary programs or services.

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<sup>11</sup> There are 77 known tribes in California that fall fully or partially in the HFTD, the publicly known geographic threshold for the SGIP ERB. Thus, the low-income populations of 77 tribes across the state will be eligible for no-cost solar and storage to provide resilience in the face of climate change impacts

#### Matrix 5: Educate Participants about Complementary Programs and Services

Activity	Channels/ Tools	Audience (s)	Conversion Metrics	KPI(s)
<b>Continue to make accessible energy efficiency on our website and direct homeowners to it via handouts and emails</b>	Online/email/print collateral	Homeowners in DACs	Website users visit pages dedicated to energy efficiency and conservation	# of webpage views, time spent on pages
<b>Refer clients to IOU energy assistance programs</b>	In-person/print collateral/email	Homeowners in DACs	Clients sign up for assistance programs	# of participating homeowners referred to CARE or FERA and ESA and % that receive ESA services

#### **Objective 6: Recruit job training participants, with a focus on Job Training Organizations and 50 trainees in DACs**

As the State continues to adapt to the pandemic and recover, the DAC-SASH training requirement can play a crucial role in training individuals who seek resilient employment. GRID aims to continue and grow its valuable workforce development opportunities and trainee recruitment in 2022 where safe to do so. GRID will continue to leverage its community networks and work with job training organizations (JTOs) located in and working with DACs to engage at least 50 residents of DACs in GRID's comprehensive training programs. This will consist of either a small cohort of in-person lab work, virtual distance learning which is an ongoing COVID-19 modification in some regions for hands-on learning, or hands-on installation of a project.

##### **Trainee Outreach**

Job trainees are often recruited to GRID's training programming through our client outreach teams or they learn about the program from family and community members receiving solar. Other outreach channels to recruit trainees include media, canvassing and partner outreach. While these channels will be impacted by the pandemic, some word-of-mouth is still expected to drive trainee recruitment in 2021.

## **Job training organization (JTO) Partnerships**

GRID has active partnerships with 50+ job training organizations and community colleges throughout California, 27 of which are located in or serve residents of DACs. GRID will continue to work with these JTOs to provide training to their current students and recruit their graduates into additional post-program training opportunities. We will leverage existing partnerships to engage DAC residents in GRID training and seek to develop new ones. In 2022, GRID's Bay Area and Inland Empire offices plan to launch IBT-200 training programs in the second half of the year, similar to our other regional offices' program. They are currently building out labs or training spaces and organizing Train-the-Trainer sessions in preparation.

## **Employment connections**

GRID will use its network of solar industry employers to connect trainees from DACs with solar jobs. In addition to the Resume Bank and Job Board, GRID will continue to produce an employer-facing newsletter and host and participate in virtual and in-person job fairs where possible.

## **Subcontractor Program**

In 2022 we expect to have 75 subcontractor partnership program (SPP) projects, in the Inland Empire primarily as well as several in Los Angeles and the Stockton area as well. GRID will support contractors participating in its SPP in hiring trainees from DACs by making our trainee database available to them via GRID's Resume Bank and Job Board and directly referring candidates when possible. GRID notes that its projected 2022 SPP installation volume is lower than in prior years and this may decrease the potential for paid job training opportunities. GRID will thus focus primarily on in-house job training and placements in 2022.

Below is a matrix summarizing activities aimed at recruiting job trainees located in DACs, to participate in the program.

Matrix 6: Recruit Job Training Participants, with a focus on JTOs and job trainees in DACs

<b>Activity</b>	<b>Channels/ Tools</b>	<b>Audience(s)</b>	<b>Conversion Metrics</b>	<b>KPI(s)</b>
<b>Recruit individual trainees from DACs through client outreach channels</b>	Multiple – see Objective 2	Job seekers in DACs, household members of participating clients	Trainees participate in a GRID training program or installation	# of trainees from DACs who sign up for an install or GRID training program; Hours of participation by these trainees

<b>Engage existing JTO partners in/ serving DACs to provide job training to students</b>	Direct outreach	Job training organizations (JTOs)	JTO students participate in GRID training program or installations	# of JTO partners; # of JTO students enrolled in GRID training program or in a DAC-SASH installation
<b>Identify new JTO partners through direct outreach and education</b>	Print collateral, PowerPoint presentations/ events	Job training organizations	JTOs partner with GRID to provide training to their students	# of new JTO partners
<b>Promote resume bank and job board as way to access paid work opportunities</b>	Email, website	Job trainees from DACs	Trainee adds resume to Resume Bank; Trainee uses Job Board	# of job seekers from DACs signed up for resume bank; # of visits to job board
<b>Engage employers to hire trainees through our resume bank, job board and employer email newsletter</b>	Online	Solar companies	Employers sign up for resume bank and job board account; Employers use resume bank and job board; Employers sign up for and open newsletter	# of employers who sign up; # jobs posted; # subscribers to employer email newsletter; open rate of email newsletter
<b>Increase % of job trainees on a DAC-SASH project who move to longer-term employment as a result</b>		Job trainees from DACs	Job trainee gains full-time employment in solar industry after working on DAC-SASH project	# of job trainees who receive longer-term employment after their DAC-SASH experience
<b>Invite trainees from JTOs to participate in virtual job fairs held by GRID and partners</b>	Online, email	Job trainees in DACs; Job training organizations	Trainees sign up for job fair	# of trainees from JTOs located in DACs who attend job fairs GRID invites them to.

## **Objective 7: Keep stakeholders informed about program and COVID impacts**

In 2021 GRID will continue actively informing stakeholders about the program's success and challenges. It will do so through a broad effort centered around community engagement, education, and the CPUC regulatory process.

Below are 2022 activities that will keep stakeholders informed about program impact.

Matrix 7: Inform Stakeholders about Program Impact

Activity	Channels/ Tools	Audience(s)	Conversion Metric	KPI(s)
Maintain a page on GRID website describing program and linking to reports and data	Web/online	All stakeholders	Public and stakeholders access program information and data	# views and downloads of program data from GRID website.
Media/ Storytelling	Press releases, Blogs, Direct media outreach	Energy Division, IOUs, broad stakeholders across the state and nation who are interested in program outcomes	Program is mentioned in media; Stakeholders read success stories	# and reach of social media posts; # blog pageviews

## VII. Evaluation

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GRID submits to the Energy Division an annual ME&O plan and modifies the plan's strategies based on results from an assessment of the plan's KPIs, successes, and challenges. GRID also actively monitors data, formal and informal complaints, and surveys clients throughout the project process to understand barriers to entry, reasons for dropouts, and client satisfaction. Client feedback is included in ME&O reporting as well as in the twice per year progress reports.

The DAC-SASH program is formally evaluated by an independent, third-party contracted by the CPUC every three years beginning in early 2022. GRID will participate fully in the evaluation process with Evergreen Economics throughout 2022 and look forward to any initial or final recommendations that result from its findings.

**Data Collection** – GRID collects data on key performance indicators (KPIs) and metrics outlined in the program's first ME&O Plan in order to create a program baseline. KPI outcomes have been highlighted in the “In Review” section of this plan. In 2022 we will continue to track and re-evaluate KPIs across ME&O objectives, determining where there are information gaps and gaining more insight on the program’s progress or areas in need of attention.

**Stakeholder Engagement** - GRID will continue to engage a broad group of stakeholders in the program. GRID may engage with the CPUC/CEC Disadvantaged Communities Advisory Group (DAC-AG) to gather input on the program and opportunities for improvement. A robust feedback loop empowers GRID to modify its ME&O strategies and ensure its approach is successful in the communities it is designed to serve.

## Appendix A: 2022 ME&O Budget

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In Appendix A, GRID includes a budget for program activities for 2022 that are directly related to ME&O. Because the DAC-SASH budget is capped for marketing and outreach at 4% of the annual budget (or \$400,000), GRID has limited this budget to that amount. GRID notes that its actual expenses to conduct statewide ME&O for the DAC-SASH program are considerably higher for both labor and non-labor expenses. GRID will allocate ~\$162,000 of the \$400,000 M&O budget to non-labor costs and will allocate the remaining \$238,000 toward labor costs for outreach staff. GRID will apply its own fundraising dollars and resources to cover additional ME&O costs that will not be recouped from the program budget.

The budget below provides a high-level estimate of labor and non-labor costs, but these costs and the calendar quarter in which they will be incurred may be modified in 2022 as best suits the ME&O objectives. For non-labor costs, GRID plans to subcontract with the following entities for ME&O activities and provides this description:

- Translation Services from LinguaLinx - Translation services for adding to GRID's portfolio of multilingual materials, and crucially for live phone translation services
- Printing from Alpha Press - Printing of outreach marketing collateral
- Mail shop services from Precise Mailing - Outreach marketing materials for client acquisition purposes
- Photography - Professional photography services as needed
- Advertising – Paid advertising as needed

## 2022 ME&O Plan



### Disadvantaged Communities – Single-Family Solar Homes Program

#### DAC-SASH Year 2022 ME&O Plan Budget (Forecast)

	Q1 2022		Q2 2022		Q3 2022		Q4 2022		TOTAL	
	Labor	Non-Labor	Labor	Non-Labor	Labor	Non-Labor	Labor	Non-Labor	Labor	Non-Labor
DAC SASH M&O02 - Marketing & Communication	Translation Services	\$1,000		\$1,000		\$1,000		\$1,000	\$-	\$4,000
	Advertising	\$3,500		\$3,500		\$3,500		\$3,500		\$14,000
	Photography							\$5,000	\$-	\$5,000
	Graphic Design								\$-	\$-
	Printing	\$4,000		\$6,000		\$6,000		\$3,000	\$-	\$19,000
	Communications Coordinator (~2% FTE)	\$-		\$-		\$1,612		\$1,514		\$3,126
	Director, Outreach Marketing (~15% FTE)	\$7,465		\$7,465		\$7,465		\$7,465		\$29,860
	Regional Outreach Manager (~2% FTE)	\$1,000		\$1,000		\$1,000		\$500		\$3,500
	Regional Outreach Coordinator (~10% FTE)	\$4,000		\$5,000		\$5,000		\$4,000		\$18,000

	Director, Marketing (~2% FTE)	\$1,000	\$-	\$1,000	\$1,000	\$3,000	
<b>DAC SASH M&amp;O01 - Community- Based Organizations (CBOs)</b>	Regional Outreach Manager (~5% FTE)	\$2,000	\$2,000	\$2,000	\$1,914	\$7,914	
<b>DAC SASH M&amp;O03 - Client Acquisition &amp; Support</b>	Buildout of online application tool (new in 2022)	\$-	\$40,000	\$40,000	\$40,000	\$120,000	
	Regional Outreach Coordinator (~1 FTE)	\$42,000	\$42,000	\$42,000	\$42,000	\$168,000	
	Regional Outreach Manager (~2% FTE)	\$1,000	\$2,000	\$800	\$800	\$4,600	
<b>Totals</b>		\$58,465	\$8,500	\$59,465	\$50,500	\$60,877	\$50,500
							\$59,193
							\$52,500
							<b>\$238,000</b>
							<b>\$162,000</b>

<b>Total Labor</b>	\$238,000
<b>Total Non- Labor</b>	\$162,000
<b>Grand Total</b>	<b>\$400,000</b>