SOMAH

Solar on Multifamily
Affordable Housing

SOMAH

Semiannual Progress Report

Reporting Period

January 1, 2026 – June 30, 2026

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1. Executive Summary

This 14th Solar on Multifamily Affordable Housing (SOMAH) Program Semiannual Progress Report (SAPR) covers the first half of 2026 and highlights accomplishments from the program's first six and a half years. It reports continued project growth, including 152 application submissions during the first half of 2026, steady use of the Affordability Prescreen service and the Progress Payment Pathway milestone, advances in system performance monitoring, and the impact of integrated energy storage incentives. Marketing efforts continue to focus on property owners and contractors by building awareness, strengthening pathways to participation, and reducing program barriers to increase application volume and help SOMAH achieve its goals.

The 152 new applications submitted represent 54 more than were submitted in the third and fourth quarters of 2025 (Q3–Q4). New applications received during this reporting period that remained active through the end of Q2 added 22.22 MW of generating capacity toward the program's 300 MW goal. Fifteen of these applications were Track A applications and seven were previously eligible prescreens. The Affordability Prescreen service helped identify six SOMAH-eligible properties and five ineligible projects. These projects were found to be ineligible due to a lack of required information within the submitted regulatory documentation.

Additional funding was released for Pacific Gas and Electric Company (PG&E), San Diego Gas & Electric (SDG&E), Southern California Edison (SCE), and Pacific Power Utilities Company (PacifiCorp). Although funding for solar remains widely available, SDG&E's and PG&E's funding for incentivized integrated storage has been fully reserved during this reporting period. PG&E's incentivized storage offering was paused, and a waitlist was started on May 22, 2026. A similar pause was implemented for SDG&E, and a waitlist was started on July 15, 2026. The storage waitlists will track interest on a first-come, first-served basis.

Extension requests increased from 106 in the second half of 2025 to 187 in the first half of 2026. Project completions also increased, with 54 inspections completed during the first half of 2026.

The SOMAH Program Administrator (PA) continues to focus on participant needs and challenges while striving to implement a resilient and successful program. During this reporting period, the SOMAH PA closely managed program changes directed by California Public Utilities Commission (CPUC) Decision (D.)24-11-006, the most notable being the rollout of incentivized integrated energy storage systems. Storage is defined

in D.24-11-006 as a technology that, when paired with solar, can further maximize support for tenants via tenant bill savings and provide other positive grid impacts such as resiliency and reliability. The addition of incentivized integrated storage has proven successful, resulting in a total of 276 SOMAH projects now including integrated energy storage in their project scope. These storage additions have reserved over $115M in incentives.

During this reporting period, marketing, education, and outreach (ME&O) efforts focused on improving resources and tailoring messages to specific audiences. For property owners and contractors, messaging emphasized time-sensitive program benefits, including availability of integrated storage and the upcoming elimination of the federal investment tax credit (ITC), which helped increase interest in SOMAH and drive application submissions. The PA launched new tenant education materials that include information about workforce development opportunities and ribbon-cutting events that introduce tenants to solar credit billing while showcasing the SOMAH Program.

Community-based organizations (CBOs) continue to assist in outreach and serve as advisors to multiple audiences. CBO partners led and participated in numerous in-person events that highlighted the program's community and workforce benefits to property owners, tenants, local stakeholders, and other decision-makers.

2. Background

The 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 as the Multifamily Affordable Housing Solar Roofs Program by California Assembly Bill (AB) 693 (Stats. 2015, Ch. 582), authored by former State Senator Susan Talamantes Eggman (D-District 05), then an Assemblymember, and signed by Governor Jerry Brown in 2015. Senate Bill (SB) 92 (Stats. 2017, Ch. 26), adopted with the 2017-18 State Budget, further clarified the funding for the program. CPUC 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. California Senate Bill 355 (SB 355) further modified the program in October 2023, extending the program through 2032 and implementing several modifications to expand program eligibility.

The SOMAH Program serves electric utility and community choice aggregator (CCA) customers in the territories of California's investor-owned utilities (IOUs): Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), San Diego Gas & Electric Company (SDG&E), Liberty Utilities Company (Liberty), and Pacific Power Utilities (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 December 31, 2032. CPUC D.24-11-006 (effective November 7, 2024) now allows incentives for storage equipment integrated with solar generating equipment.

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 benefits. 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 (AEA), Center for Sustainable Energy® (CSE), and GRID Alternatives, in collaboration with the California Housing Partnership and rotating CBOs. The California Public Utilities Commission (CPUC) oversees the SOMAH Program.

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 where the contractor has already been selected and 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 toward solar, has a shovel-ready project, or has recently completed installations. 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 to provide Upfront Technical Assistance (TA) services for property owners who need support with understanding if solar is right for their property. SOMAH's Technical Assistance and Support Services provide a well-rounded understanding of a property's energy needs as well as access to educational, technical, and financial resources that facilitate valuable energy efficiency upgrades and solar installations. Participants who select Track A have their incentive funding earmarked for the duration of the Upfront TA period, prior to submitting a reservation request. Participants in Track A who have not identified a solar contractor, are guided through a bid solicitation process to select an eligible solar contractor for their project.[2]

Track B is designed for property owners who receive direct program marketing and outreach from an eligible contractor, project developer, or similar entity. Projects on 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. Track B projects can request to receive the program's suite of Technical Assistance and Support Services as needed and at any stage of their project. Details 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 – Application Steps (*Includes Optional Upfront Technical Assistance)

[1] EPBB incentives are based on the system's capacity and design, which provide an estimate of the system's future performance. Per D.24-11-006 and effective as of November 14, 2024, the EPBB calculator was suspended for all future and active applications in Liberty and PacifiCorp territories, tribal applications in the PG&E territory, and PG&E projects located at or above one minute south of the 39th parallel.
[2] Per D.24-11-006, the multiple bid requirement for Track A projects was removed.

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 have at least five rental units and meet the definition of deed-restricted, affordable housing in Public Utilities 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 are 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 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 in a disadvantaged community.

2.3.1 Program Administrative Budget

The administrative budget is shared by the SOMAH PA, CPUC Energy Division, and the IOUs. The SOMAH PA tracks the program expenses in four main categories: SOMAH Program Administration; Marketing, Education, and 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, 2026.

Figure 2 – Total Program Administrative Expenditures by Category

Category	
SOMAH Program Administration	$28,832,177
SOMAH Marketing, Education, and Outreach (ME&O)	$18,650,130
SOMAH Workforce Development	$2,958,353
SOMAH Technical Assistance	$3,239,229
SOMAH Evaluation Expenses[4]	$1,564,181
Investor-Owned Utility (IOU) Expenses	$8,582,865
Total	$63,826,936

More detailed expenditure information can be found at California Distributed Generation Programs.

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 weekly.[5] 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 waitlists, when applicable. The funds for each utility territory may be released at separate times, with the collections based on each utility's Energy Resource Recovery

[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] Program incentive budget information for each IOU territory: https://www.californiadgstats.ca.gov/programs/somah_budget/.

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

The following utility territories released funding during the first half of 2026: PG&E (June 2026), SCE (March 2026), SDG&E (March 2026), and PacifiCorp (June 2026). 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 Q1 and Q2 releases mentioned, and identifies application totals and available program funds.

Figure 3 – Project Capacity and Budget

		Waitlist		Earmarked		Pending Reservation		Reserved	
		Capacity (MW)	Budget ($)	Capacity (MW)	Budget ($)	Capacity (MW)	Budget ($)	Capacity (MW)	Budget ($)
PG&E	Track A	N/A	N/A	1.859	5,654,118	N/A	N/A	1.011	2,616,443
	Track B	N/A	N/A	N/A	N/A	10.141	26,938,047	36.940	80,314,737
	Total	0	0	1.859	5,654,118	10.141	26,938,047	37.951	82,931,180
SCE	Track A	N/A	N/A	0.457	1,460,979	N/A	N/A	0.144	246,239
	Track B	N/A	N/A	N/A	N/A	0.310	689,405	20.808	43,017,333
	Total	0	0	0.457	1,460,979	0.310	689,405	20.952	43,263,572
SDG&E	Track A	N/A	N/A	0.138	443,089	N/A	N/A	N/A	N/A
	Track B	N/A	N/A	N/A	N/A	1.246	3,450,216	7.564	15,202,113
	Total	0	0	0.138	443,089	1.246	3,450,216	7.564	15,202,113
PacifiCorp	Track A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Track B	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Total	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
	Track B	N/A	N/A	N/A	N/A	N/A	N/A	0.103	212,469
	Total	0	0	0	0	0	0	0.103	212,469
TOTAL	Track A	0	0	2.454	7,558,187	0	0	1.155	2,862,682
	Track B	0	0	0	0	11.697	31,077,668	65.415	138,746,652
	Total	0	0	2.454	7,558,187	11.697	31,077,668	66.570	141,609,334

		Completed		PV Application Totals		Storage Application Totals		Total Budget ($)	Remaining Budget ($)
		Capacity (MW)	Budget ($)	Capacity (MW)	Budget ($)	Capacity (MW)	Budget ($)		
PG&E	Track A	0.148	72,177	3.018	8,535,362	0.020	60,600	332,978,153	73,694,701
	Track B	30.555	44,212,442	77.636	167,606,265	25.160	83,081,226		
	Total	30.703	44,284,619	80.654	176,141,627	25.180	83,141,826		
SCE	Track A	0.351	1,079,669	0.952	2,786,887	0	0	406,904,639	303,670,530
	Track B	20.578	42,273,827	41.696	85,980,566	6.360	14,466,656		
	Total	20.929	43,353,496	42.648	88,767,453	6.360	14,466,656		
SDG&E	Track A	N/A	N/A	0.138	443,089	0	0	105,220,365	58,101,871
	Track B	6.751	13,976,364	15.561	32,628,692	3.065	14,046,713		
	Total	6.751	13,976,364	15.699	33,071,781	3.065	14,046,713		
PacifiCorp	Track A	N/A	N/A	0	0	0	0	12,168,648	12,168,648
	Track B	N/A	N/A	0	0	0	0		
	Total	0	0	0	0	0	0		
Liberty Utilities	Track A	N/A	N/A	0	0	0	0	3,020,427	2,591,268
	Track B	N/A	N/A	0.103	212,469	0.079	216,690		
	Total	0	0	0.103	212,469	0.079	216,690		
TOTAL	Track A	0.499	1,344,470	4.108	11,765,338	0.020	60,600	860,292,232	450,227,017
	Track B	57.884	116,603,671	134.996	286,427,991	34.664	111,811,285		
	Total	58.383	117,948,141	139.104	298,193,330	34.684	111,871,885		

In Figure 3, PV Totals include capacity and budget values for Earmarked, Pending Reservation, Reserved, and Completed projects but do not include storage totals. Storage Totals include capacity and budget values for Earmarked, Pending Reservation, Reserved, and Completed projects that include integrated storage.

Figure 4 – Cumulative Program Budget

	PG&E	SCE	SDG&E	PacifiCorp	Liberty Utilities	TOTAL
2016 Budget ($)	1,740,992	2,733,251	0	422,443	132,440	5,029,126
2017 Budget ($)	4,359,110	4,536,050	0	961,291	258,329	10,114,780
2018 Budget ($)	39,330,000	41,400,000	9,270,000	1,009,512	314,706	91,324,218
2019 Budget ($)	33,963,300	30,581,476	9,104,076	1,150,528	419,517	75,218,897
Under-Collections True-up ($)	31,620,584	45,542,591	11,343,785	0	0	88,506,960
2020 Budget ($)	34,898,605	20,410,891	10,294,957	1,177,394	326,327	67,108,174
2021 Budget ($)	28,448,281	57,569,657	9,831,156	1,090,332	300,128	97,239,554
2022 Budget[6] ($)	41,600,106	66,028,108	18,524,768	1,512,862	401,608	128,067,452
2023 Budget ($)	38,400,027	43,839,644	13,454,945	1,606,391	299,170	97,600,177
2024 Budget ($)	25,348,294	25,142,074	4,296,389	1,666,073	568,202	57,021,032
2025 Budget ($)	31,163,731	45,188,100	12,267,572	1,312,838	TBD	89,932,241
2026 Budget ($)	22,105,123	23,932,797	6,832,717	258,984	TBD	53,129,621
Application Totals	259,283,452	103,234,109	47,118,494	0	429,159	410,065,215
Total Budget	332,978,153	406,904,639	105,220,365	12,168,648	3,020,427	860,292,232
Remaining Budget	73,694,701	303,670,530	58,101,871	12,168,648	2,591,268	450,227,017

[6] 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; Marketing, Education, and Outreach (ME&O); Workforce Development; and Technical Assistance (TA). 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 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 $450.22 million across the program for this reporting period. No IOU territory has had a solar waitlist since Q4 2020 (SDG&E). This reporting period was the first where there was an active waitlist for incentivized integrated storage in the PG&E territory. At the end of this reporting period there were no applications on the PG&E storage waitlist. 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 be voluntarily withdrawn by the applicant or host customer. Second, incentive funds may become available because of system changes during application review. For example, an applicant's adjustments to the system size after receiving consumption data from the IOU typically affects 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 pool 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, and other reasons.

Applicants lack the ability to easily retrieve tenant consumption data before submitting a program application, which has historically resulted in a longer reservation request review timeline. During Q1 and Q2 2026, the PA has continued improving the process of retrieving consumption data by increasing communication with the IOUs and improving formatting to shorten the data request process, thereby shortening the reservation request review timeline. Application streamlining efforts have been included in each of the approved handbook versions, starting in 2022 with Handbook 5. 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 Since Program Start

Program	Active	Complete/ Incentive Paid	Cancelled/ Withdrawn	**Total**
PG&E	315	280	284	**879**
SCE	125	113	117	**355**
SDG&E	57	54	80	**191**
Liberty Utilities	1	0	1	**2**
PacifiCorp	0	0	1	**1**
Total	**498**	**447**	**483**	**1428**

N = 1,428

Of the 152 applications submitted between January and June 2026, 144 remain active at the close of this reporting period. This represents a 46.9% increase in the number of active applications compared to the July through December 2025 reporting period, during which 98 of 103 submitted applications remained active. Application submissions throughout this reporting period were steady with a large spike in May (58 submissions). The increase in new applications was largely attributed to the storage incentive pause in PG&E territories, as projects sought to integrate energy storage systems alongside their PV installations prior to the May 22, 2026, deadline.

Of the 144 remaining active applications submitted from January through June 2026, 65 new applications were submitted in Q1, and 79 were submitted in Q2. Fifteen of the new applications were Track A projects, all submitted in the larger IOU territories (PG&E, SCE, and SDG&E), two were previously cancelled re-entry applications, seven participated in the Affordability Prescreen service, and 95 included integrated storage.

Track A application submissions have remained steady since the last reporting period. This pace can be attributed to the SOMAH PA's coordination with other energy efficiency program administrators, increased use of the Technical Assistance and Support Services request form, and significantly increased popularity of the prescreen service. The optional prescreen service provides property owners who are unfamiliar with SOMAH the ability to submit applications with confidence by predetermining their eligibility for the program, providing them with an introduction to PowerClerk and the SOMAH PA, and pre-generating their application number, offering a smooth transition into the reservation request process.

SOMAH did not receive new applications in Liberty or PacifiCorp territories this reporting period, but the SOMAH PA looks forward to further engagement with the northern utilities with a goal to increase participation in these territories in 2026 and beyond.

One active application in the Liberty territory has reached the Progress Payment Request Milestone while the other previously active application in PacifiCorp territory was cancelled but plans to re-enter the program once issues with site conditions and project planning are resolved. The PA expects to hold a ribbon-cutting event to showcase the Liberty project by the end of the year. In addition, the property owner team sent mailers to priority properties in the Liberty and PacifiCorp territories providing them with high-level Technical Assistance Preview Reports highlighting projected SOMAH benefits specific to their potential projects with precise eligible property information in the PacifiCorp and Liberty territories. The PA plans to build off this effort with a second round of mailers. The SOMAH PA secured one interest call.

The total numbers of new applications (including both active and cancelled applications) submitted in the previous reporting periods are as follows:

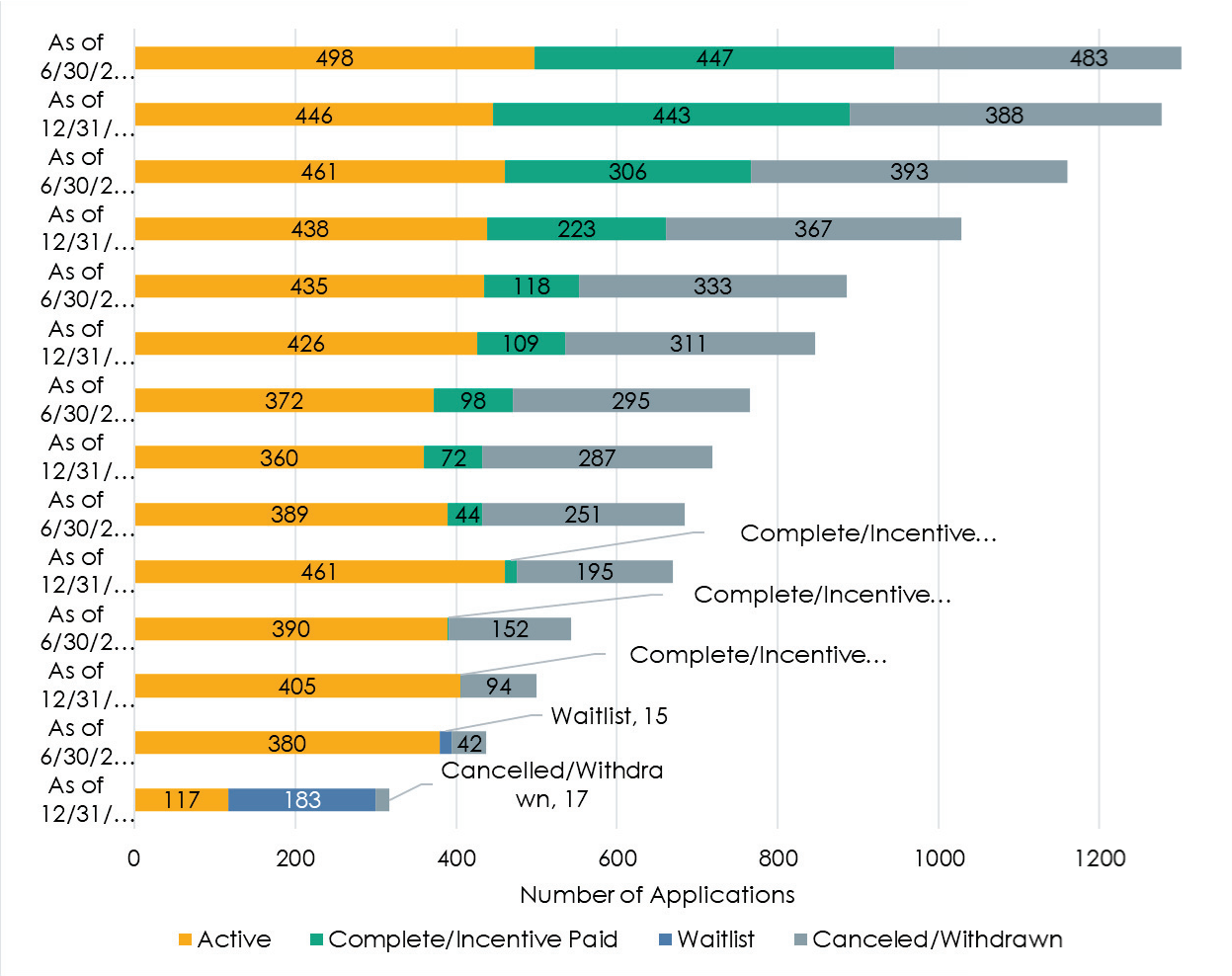
- January–June 2026: 152 new applications
- July–December 2025: 103 new applications
- January–June 2025: 120 new applications
- July–December 2024: 147 new applications
- January–June 2024: 63 new applications
- July–December 2023: 81 new applications
- January–June 2023: 46 new applications
- July–December 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

- July 2019–December 2019: 317 new applications

Total new application volume in the first half of 2026 remained on par with the high application volume seen during both 2025 reporting periods. There was a 5% increase in new application volume as compared to 2024 and nearly double the total number of applications submitted in 2023 (127 total applications). The application volume for 2026 is up 353.06% from the application slowdown in 2022 (49) and represents the second highest annual volume, only behind 2019 when the program first launched. The program anticipates steady application submittals throughout the year, with current 2026 submissions peaking at around 25 applications a month.

Third-party evaluations (2020 Phase I SOMAH Process and Impact Assessment Report, 2021 Phase II Evaluation Report, 2023 Triennial SOMAH Evaluation Report, and 2026 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.

Figure 6 – Cumulative Applications Received



In November 2022, the SOMAH PA launched 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 prescreen properties for SOMAH eligibility alleviates a significant administrative burden for both applicants and SOMAH PA staff. Through this resource, participants can establish communication with the SOMAH PA that helps overcome initial application questions and build rapport prior to application submission. By using additional supportive measures, such as the Affordability Prescreen service and SOMAH's suite of Technical Assistance and Support Services, quality leads with viable, suited projects are best prepared to submit project applications in PowerClerk. See Section 3.2.4, Property Owners for more information.

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. This enhancement integrated the popular service into the same platform as the program application. Potential applicants can now submit a prescreen request directly through PowerClerk using the VersaForm feature. Unlike the previous iteration of this service, the VersaForm feature does not require a PowerClerk account for submission, further minimizing administrative burden on potential applicants. Another goal of this process improvement is to increase applicant familiarity with PowerClerk, further encouraging eligible prescreens to convert to active SOMAH applications. Once the prescreen request is deemed eligible, relevant data is automatically transferred to the official SOMAH application in the appropriate utility territory, ultimately reducing the applicant's required data entry.

Since implementing the Affordability Prescreen service at the end of 2022, the process has proven to effectively identify ineligible projects before they enter the application pipeline, thereby reducing administrative burden for both applicants and the SOMAH Program Administrator. To date, 88 prescreen entries have converted into active SOMAH applications, while 89 properties were identified as ineligible, resulting in zero application cancellations due to regulatory documentation ineligibility after Reservation Request submission.

Prescreen data is used to track project conversions from prescreens to SOMAH applications and to identify potentially eligible projects for targeted outreach and education efforts. Common reasons for ineligibility include expired deed restrictions or having less than 10 years remaining in their deed restrictions' compliance period, as well as lack of information within the document to confirm the property's location.

No prescreens needed the Income Affidavit to support eligibility during this reporting period, continuing the downward trend observed in previous periods. This decline is directly related to the Handbook 8 update, which broadened SOMAH's affordability requirements. While the income affidavit pathway remains available, it is no longer utilized as frequently to verify if a property meets SOMAH's affordability requirements. The volume of prescreens and throughput to new application submissions is as follows:

- January–June 2026: 11 prescreens processed
  - 6 eligible, 0 eligible with income affidavit, 5 ineligible
- July 2025–December 2025: 12 prescreens processed
  - 10 eligible, 1 eligible with income affidavit, 1 ineligible
- January 2025–June 2025: 31 prescreens processed
  - 20 eligible, 1 eligible with income affidavit, 10 ineligible
- July 2024–December 2024: 46 prescreens processed
  - 25 eligible, 2 eligible with income affidavit, 19 ineligible
- 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

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. Additionally, this cancellation feedback has allowed 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 three previously cancelled applications re-entering the program in the first half of 2026.

The SOMAH PA maintains consistent communication with SOMAH contractors who have active applications to understand their project timelines and potential barriers. This interface with contractors and program participants also helps support forecasting efforts for program activities as well as tailor project assistance for unique application

situations. Over the past year, as application activity picked up for 18-month reservation expiration due dates, extension requests for the Incentive Claim Package deadline remained consistent with 86 extension requests received in Q1 and 101 extension requests received in Q2. Following is a breakdown of Incentive Claim Package deadline extensions submitted in the previous reporting periods:

- January–June 2026: 187 new extension requests processed
- July 2025–December 2025: 106 new extension requests processed
- January 2025–June 2025: 157 new extension requests processed
- July 2024–December 2024: 207 new extension requests processed
- 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: 24 new extension requests processed

It is important to note that "new extension requests" refer to the number of extension requests submitted, not the number of applications that received extensions. All applications may submit more than one extension request throughout their application timeline. Each extension request is reviewed and approved on a case-by-case basis. From start to completion, the average length of an Incentive Claim Package deadline extension request is 175 days. The maximum extension term per request is 180 days. Like previous reporting periods, most extension requests cite one of two reasons: 1) changes to the original design layout or funding of the project; or 2) problems in the permitting or interconnection process that caused a delay. Utility-related delays, such as long interconnection timelines, difficulty scheduling shutdowns and meter releases, and inspection delays, were cited at varying levels of frequency. Despite these extensions, the program continues to consistently complete and pay out projects. The PA provides the IOUs a list of projects with utility-related extension requests monthly. This list is shared with the appropriate utility teams to help expedite resolutions.

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 (if not yet initiated), or actual (if commenced) construction start date. This information helps identify where the project is in the life cycle of installation when the SOMAH application is submitted. 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. After

receiving reservation approval, at the start of each milestone (Energy Efficiency Compliance, Proof of Project, and Incentive Claim) applicants are prompted to report whether construction has started or, if not, update the projected construction start date. As of Q1 2024, applicants are required to provide the mechanical completion date of a project. Tracking mechanical completion dates supports the SOMAH PA's understanding of the time it takes for a system to receive permission to operate (PTO). For the 177 projects that have reported both the mechanical completion date and PTO date, the average time between mechanical completion and PTO is about nine months. By collecting this data, the PA aims to gain valuable insights into project timelines and potential delays. 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 into milestone progress.

Actual construction start timelines will continue to be updated as data is collected at different milestones in the application process. Throughout Q1-Q2 2026, 187 new extension requests were submitted, all of which contain a 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 projects that have submitted multiple extension requests, findings show the most recently submitted requests are more likely to have already begun construction instead of providing a projected construction start date. The revised Extension Request allows the SOMAH PA to gain more visibility into construction timelines, project progression, and the necessity for extension requests.

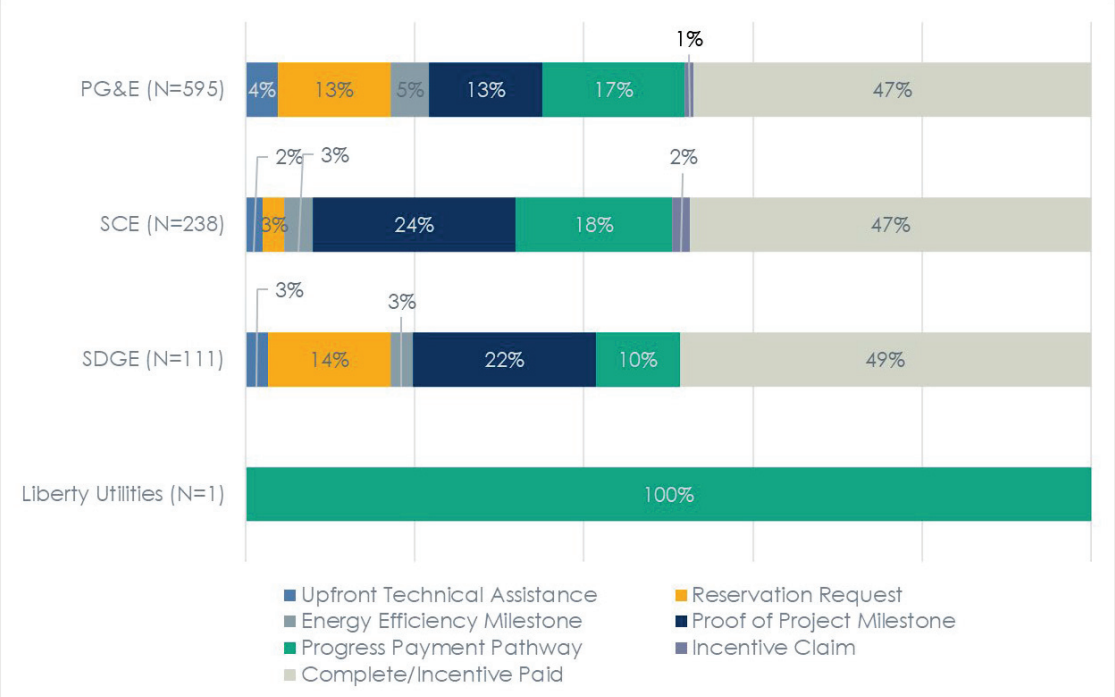
The number of projects reported to have begun construction in Q1-Q2 2026 (48) remained steady in both quarters with 24 projects beginning construction in Q1 2026 and 24 projects beginning construction in Q2 2026. In comparison, 20 projects began construction in Q3-Q4 2025, with 13 projects beginning construction in Q3 2025 and seven in Q4 2025. Construction timeline projections continue to shift through Q3-Q4 2026 as projects progress and are better able to forecast timelines with more certainty. Through feedback provided via extension requests and other direct applicant input, the SOMAH PA anticipates a significant number of projects will enter the project completion phase in the second half of 2026.

Figure 7 – Current 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	23	79	27	80	100	6	280
SCE	5	6	8	57	44	5	113
SDG&E	3	16	3	24	11	0	54
Liberty Utilities	0	0	0	0	1	0	0
PacifiCorp	0	0	0	0	0	0	0
Total	**31**	**101**	**38**	**161**	**156**	**11**	**447**

N = 945

Figure 8 – Percentage of Active Applications by Milestone and Territory[7]



N = 945

[7] PacifiCorp is not represented in Figure 8 because no projects are active in this territory at the time of reporting.

In Q1-Q2 2026, 15 new Track A applications were submitted. One of these applications utilized the prescreen service prior to submitting Track A. Of the 15 Track A applications working with the SOMAH PA to submit the documentation required for the Upfront Technical Assistance stage in PowerClerk, two are approved, six are in suspended status and four have been cancelled, three were not customers of the participating IOU territories and one was mistakenly submitted in the incorrect territory and was later resubmitted in the correct territory. The SOMAH PA works diligently with property owners to ensure they receive guidance through every part of the Track A application process, program requirements, platforms, etc. More information is in Section 3.5, Technical Assistance.

Figure 9 – Applications by Incentive Track Since Program Start

Assigned Incentive Track	Active	Complete/ Incentive Paid	Cancelled/ Withdrawn	**Total**
Track A	43	4	62	**109**
Track B	455	443	421	**1319**

N = 1,428

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

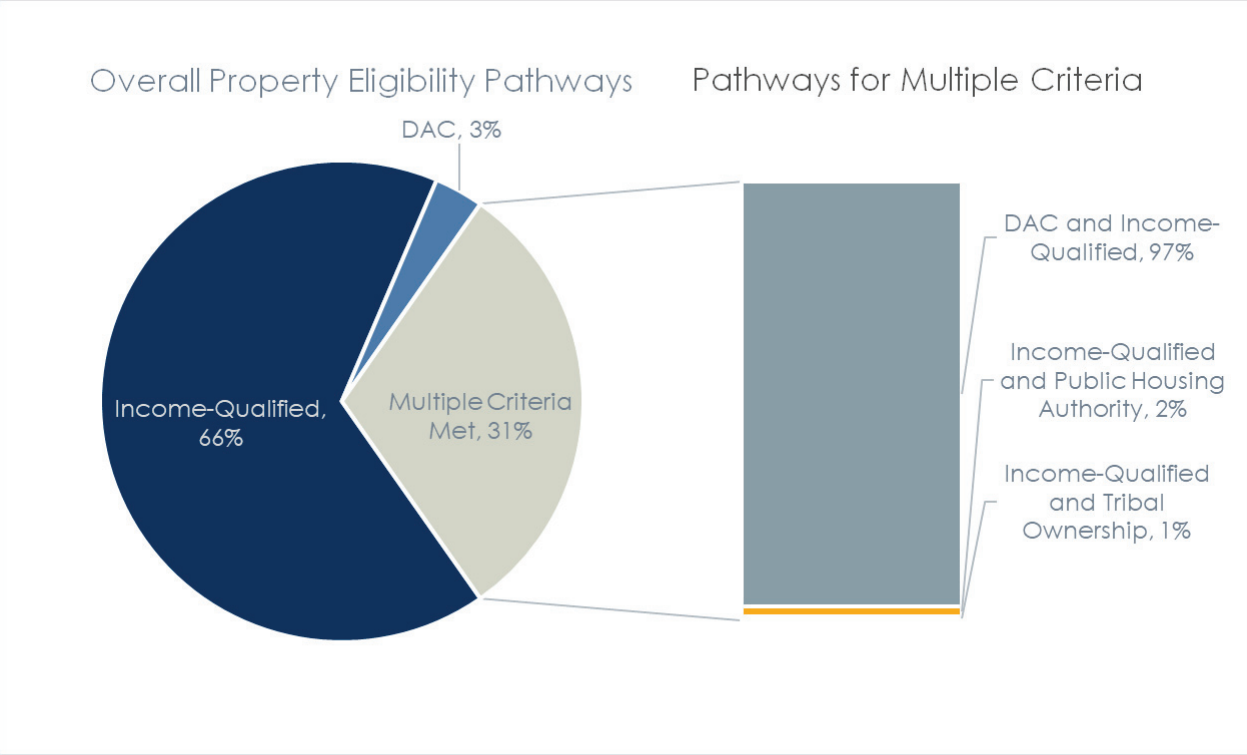
- Income-Qualified: 66% of property residents have incomes at or below 80% AMI as determined by the California Department of Housing and Community Development.
- DAC: The property is located in a disadvantaged community (DAC) as identified by CalEPA.
- Tribal Ownership: The property is owned by a California Native American tribe.[8]

[8] As defined in Section 21073 of the Public Resources Code, "tribe" is defined as a "California Native American tribe," meaning 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.

- Public Housing Authority: The property is rental housing property that is owned by a public housing authority or public housing agency.[9]

Figure 10 breaks down the eligibility pathways under which active SOMAH projects are qualified. Figure 11 shows the breakdown between application track and eligibility pathways.

Figure 10 – Overall Property Eligibility Pathways

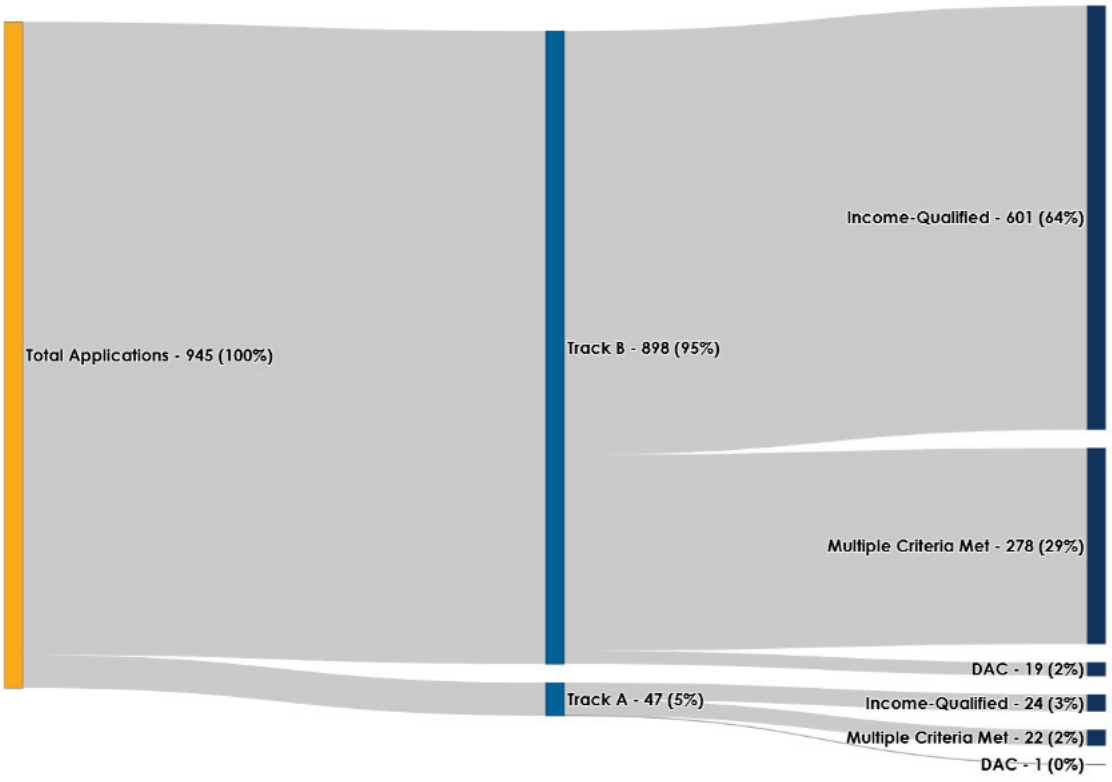


[9] To qualify under Public Housing Authority, the property must be owned by either a public housing authority created pursuant to the Housing Authorities Law (Chapter 1 [commencing with Section 34200] of Part 2 of Division 24 of the Health and Safety Code) or a public housing agency, as defined in Section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

Of the 945 applications[10] received, approximately 66% qualified for the program through the income eligibility pathway only, 3% qualified solely through the DAC pathway, and 31% met multiple eligibility criteria.

During the program's first two years, projects located in DACs represented an average of 27% of all SOMAH applications. At the end of this reporting period, that percentage increased to 34%, indicating the continued participation from disadvantaged communities.

Figure 11 – Property Eligibility by Incentive Track[11]



[10] Active applications are those that have not been cancelled or withdrawn. This figure includes applications pending reservation approval that have not yet had their project information fully finalized.
[11] Calculations used for this visual are subject to rounding and total percentages may not equal 100%.

Figures 12 and 14 further break down the property eligibility statuses by count and percentage to highlight the number of DAC, Public Housing Authority, Tribal Ownership, and Income-Qualified properties.[12] 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 the Handbook 5 update to uphold DAC status of both the current and immediately previous version of CalEnviroScreen and the inclusion of federally recognized tribal lands as part of the CalEnviroScreen DAC designation. Both updates expand additional potentially eligible properties to qualify for SOMAH through their DAC status.

Since implementing Handbook 8 and establishing the two additional eligibility pathways, no new projects have qualified solely through Tribal Ownership or Public Housing Authority. Based on eligible property data reviewed by the SOMAH PA, most eligible properties that are owned by a tribe or public housing authority also qualify for SOMAH either 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." Figures 12 through 14 display the current application statuses broken down by property type.

Figure 12 – Property Eligibility by Reservation Status Since Program Start

Property Eligibility	Pending Reservation Approval	Reservation Approval Received	Complete/ Incentive Paid	Cancelled/ Withdrawn
Multiple Criteria Met	32	144	124	136
DAC	2	5	13	27
Income-Qualified	64	251	310	319
Tribal Ownership	0	0	0	0
Public Housing Authority	0	0	0	0
Data not reported	0	0	0	1

N = 1,428

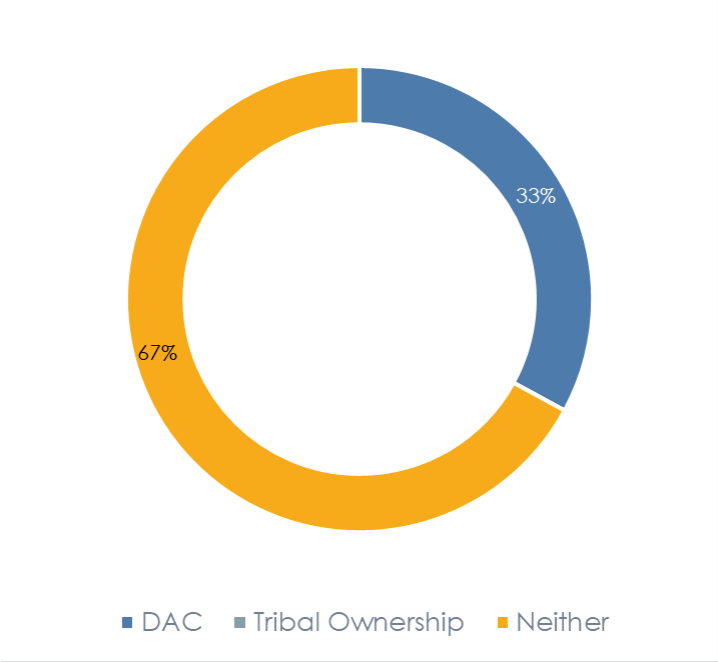
[12] DACs are not distributed evenly across the IOU territories. The percentage of census tracts that are DACs in each IOU territory varies, along with the overlap of eligible properties in a DAC by each IOU territory. The SOMAH PA does not know of any properties located in DACs in Liberty Utilities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

Figure 13 – HUD and USDA Property Eligibility by Application Status Since Program Start

Property Type	Pending Reservation Approval	Reservation Approval Received	Complete/ Incentive Paid	Cancelled/ Withdrawn
HUD	13	23	42	35
USDA	0	7	10	28

N = 141

Figure 14 – Property Eligibility by DAC/Tribal Ownership Status Since Program Start



N = 1,428

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 milestone. The 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[13]) before issuing a reservation approval. This approval is an important achievement for projects and for programmatic data and milestone tracking.

At the close of Q2 2026, there were 75 applications pending reservation approval. Track A applications that have not yet submitted a reservation request account for 11 of the 75 applications. The remaining 64 applications are in the Reservation Request Milestone and of those, 33 applications are currently in Pending Data Request, Data Results Shared, or Pending Application Deposit status, which the application must move through before receiving reservation approval. Twenty-nine applications are in Reservation Request Submitted or Resubmitted, Pending QA, Suspended, Overdue, or Review status. Most of the program's applications have passed the Reservation Request Milestone; 417 applications have received reservation approval, and 447 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 CPUC D.17-12-022, the SOMAH PA sends monthly reports to the IOUs for the Multifamily Energy Savings Program (MFES) (PG&E, SCE, and SDG&E) and SMJU ESA Programs (PAC and LIB). Previously named the Energy Savings Assistance Program (ESA), MFES was launched to provide in-unit and whole-building upgrades for low-income residents. MFES is split into two territories, Northern and Southern California. 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 both monthly and annually. A list of projects that have reached reservation approval status is shared monthly, along with a roll up of all projects with all approved reservations. These reports are an

[13] 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.

important part of the data exchange between the SOMAH PA and IOUs, which creates "warm" MFES and ESA Program leads that will hopefully become active MFES and ESA participants. The outcome of the monthly reported leads is collected annually in Q4 with data that is provided by 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 MFES Program launched on July 1, 2023. The most current data on successfully enrolled MFES projects is noted below, and the SOMAH PA will continue to report on these projects in future reports.

The annual MFES/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 captures MFES/ESA Program efforts for SOMAH projects. The SOMAH PA collected reportable feedback for the 2024 annual MFES/ESA referral data request in Q1 2025. Results of the 2024 request are summarized below, while feedback for the 2025 annual ESA referral data request will be shared in the Q3-Q4 2026 SAPR.

PG&E

- 18 projects referred to ESA/MFES, equating to 745 tenant units.
- 1 project completed ESA Common Area Measures, and 1 project is in progress for in-unit.
- Measures installed include occupancy sensors and tankless water heaters.

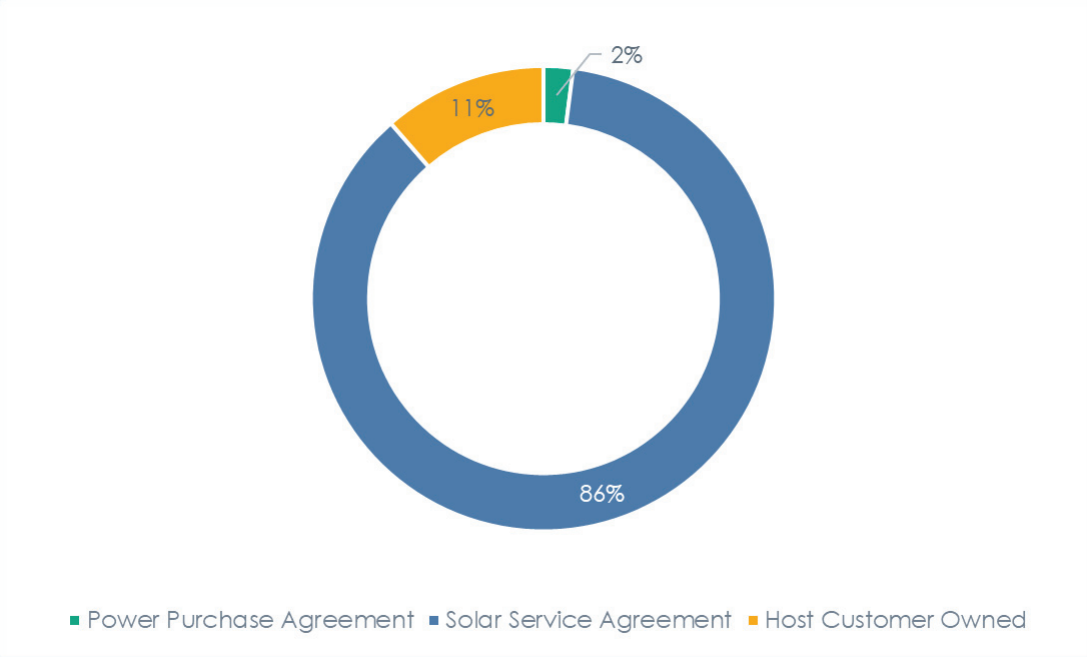
SCE

- 3 projects referred to ESA, equating to 167 tenant units.
- 5 projects enrolled in ESA Common Area Measures and in-unit.
- Measures installed include bulb replacements, outdoor and indoor fixtures, pool pump replacement, HVAC, and smart thermostats.

SDG&E

- 9 projects referred to ESA, equating to 575 tenant units.
- No projects enrolled in ESA Common Area Measures or in-unit.
- Measures installed include air sealing, LED lights and bulb replacements, smart strips, microwaves, shower head replacements, water education, in-home energy education, and assessment.

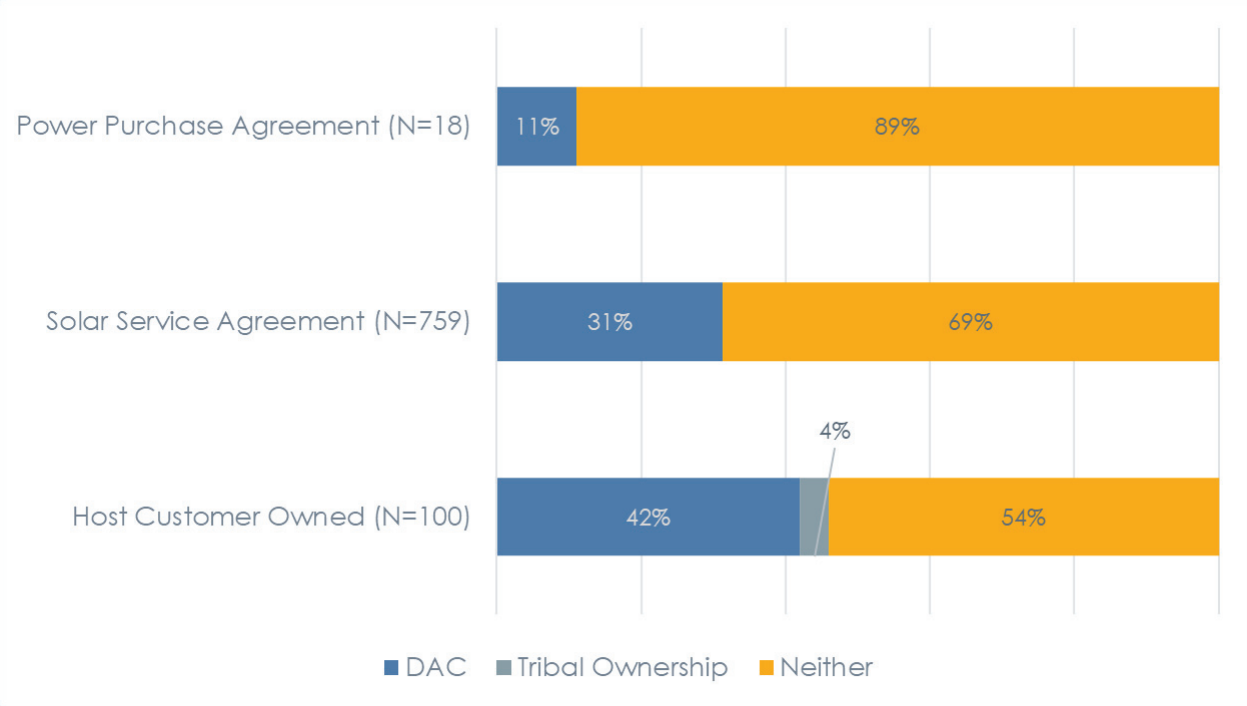
Figure 15 – System Ownership Type



N = 879

Figure 15 shows 86% of SOMAH projects are Solar Service Agreement (SSA) systems, similar to what some contractors term power purchase agreements (PPAs). With Handbook 5, the SOMAH PA began differentiating contract types between SSAs and PPAs, both of which are third-party ownership models, in an effort to capture the most accurate information based on the solar PV contract. For the purposes of SOMAH, an SSA is a contract where the customer pays a fixed monthly fee for the use of the system as opposed to paying a rate for the amount of electricity generated. 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 likely influences 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 is in Section 3.2.3, Contractors.

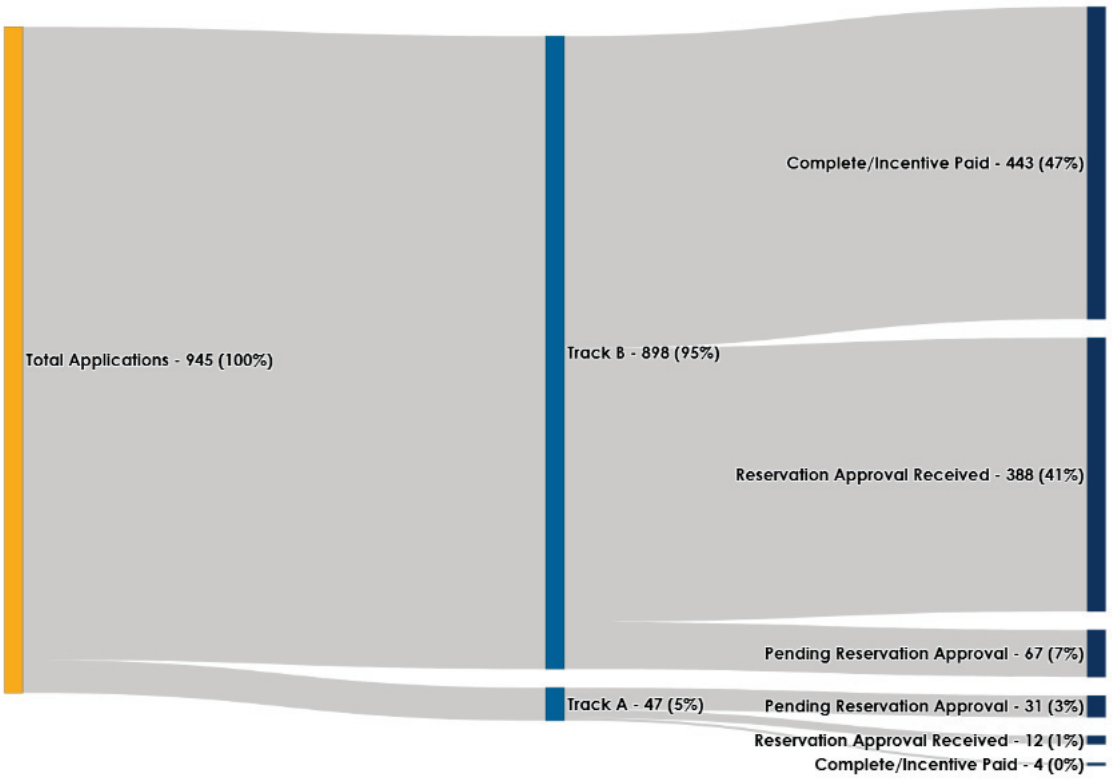
Figure 16 – System Ownership Type by Property Eligibility



N = 879

Figure 16 further segments system ownership types by DAC, Tribal Ownership, or neither DAC nor Tribal Ownership properties. It illustrates that 42% of host customer-owned systems are reported to be installed in DACs and another 4% at tribal-owned properties. In comparison, 42% of solar installations in DACs have entered an SSA or PPA, indicating that DAC properties are just as likely to enter an SSA or PPA as to purchase their solar systems.

Figure 17 – Application Reservation Status by Incentive Track[14]



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

Energy Efficiency Compliance Milestone

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 walkthrough audit.
- Pathway 2 – One of the following:

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

- Recent or active participation in an approved whole-building energy upgrade program.
- Documentation of a recent California Tax Credit Allocation Committee rehabilitation.
- Documentation that the property was completely constructed under a recent version of Title 24.

To accommodate COVID-19 challenges with completing Pathway 1, the SOMAH PA temporarily introduced the EECM Postponement option in July 2020, allowing projects that received reservation approval to postpone submitting their EECM documentation up to submission of the Incentive Claim Milestone. Of the 272 currently active applications that have participated in EECM postponement, only 11 are left that have yet to fulfill the requirement. The SOMAH PA continues to make progress closing out these remaining applications that have opted into EECM postponement.

Application Statistics

Completing application milestones is a critical step in the application process and important for collecting valuable program data. In this reporting period, the program queue has projects in all stages of application, construction, and completion processes representing each of the program's five application milestones (with the option to opt out of one[15]). The Reservation Request and Energy Efficiency Compliance Milestones are important steps in determining project eligibility and 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.

[15] Per D.24-11-006, the Progress Payment Pathway is the default option, with an option to opt out. This change was implemented through Handbook 9.

Integrated Energy Storage Systems

Eligible energy storage that is integrated with a SOMAH VNEM (Virtual Net Energy Metering) solar system can receive incentive funds from the SOMAH Program effective with Handbook 9. Applicants were first able to add integrated storage to projects in PowerClerk beginning on July 30, 2025. Since then, 276 projects have added integrated energy storage to the project scope, equating to 35,861 kilowatts, with averages and distributions shown in Figures 18, 22, and 23. Of these 276 projects, four projects have received their final incentive payment. Although incentives for integrated energy storage are currently available, the SOMAH PA is not required to offer storage incentives to all interested applicants to ensure the program meets its statutory goal of installing 300 MW of solar capacity.[16] Therefore, the PA can modify or cease the energy storage incentive offering at its discretion. As mentioned in the Executive Summary, the incentivized integrated storage offering in the PG&E territory was paused during this reporting period on May 22, 2026, and a waitlist was opened for the incentivized integrated storage offering for PG&E projects. Furthermore, the incentivized integrated storage offering in the SDG&E territory is planned to be paused and go onto a waitlist on July 15, 2026. The pauses to incentivized storage in both territories were initiated due to storage reservation quantities, that, if left to continue, would strain the incentive budget's ability to meet the program's statutory solar capacity goal. Figure 24 does not include capacity added by integrated storage and only represents solar capacity. More information on storage incentives is in Section 3.1.2 Program Payments.

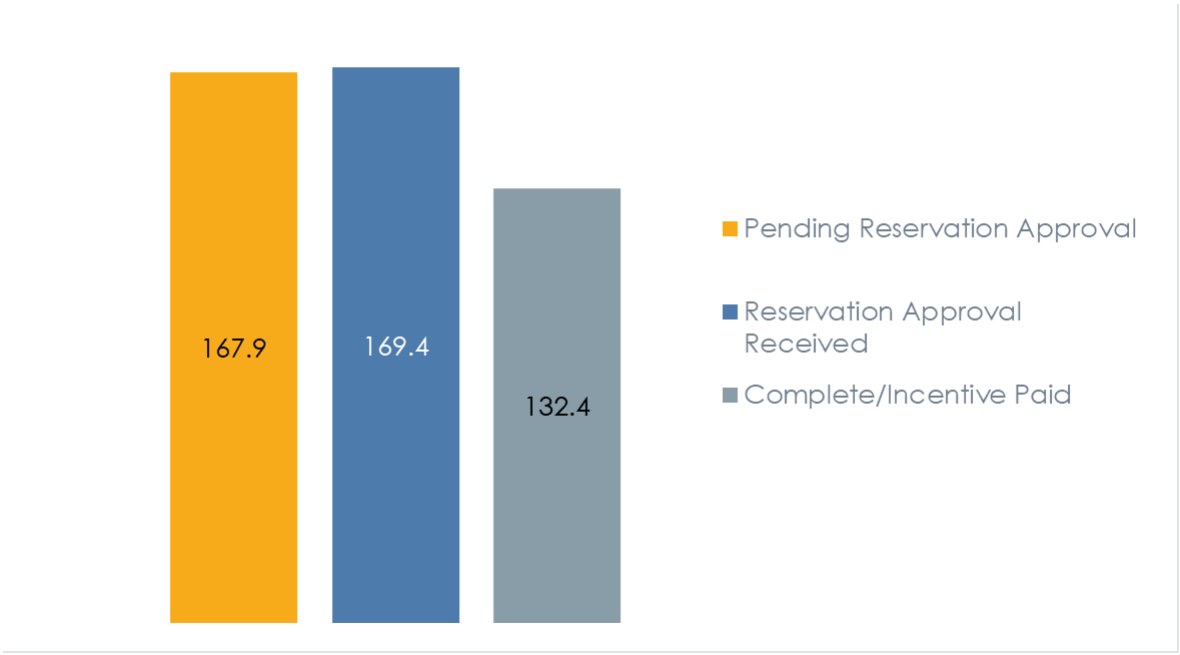
System Size and Cost

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. Application data from PowerClerk shows newer projects (submitted in 2026) are trending with larger adjustments overall when compared to projects submitted in 2025. Of the 69 applications that reached reservation approval in Q1-Q2 2026, 53 projects adjusted their system size during the Reservation Request Milestone, while the remaining 16 maintained their originally submitted system size through reservation approval. Of the 23 projects that adjusted system size, only 13 projects increased the system size from what was originally

[16] D.24-11-006. Page 37.

submitted. Due to available program funds and lack of a waitlist, contractors have more flexibility when submitting a SOMAH application and can use the Reservation Request Milestone to fine-tune their system size before signing the Reservation Request Form.

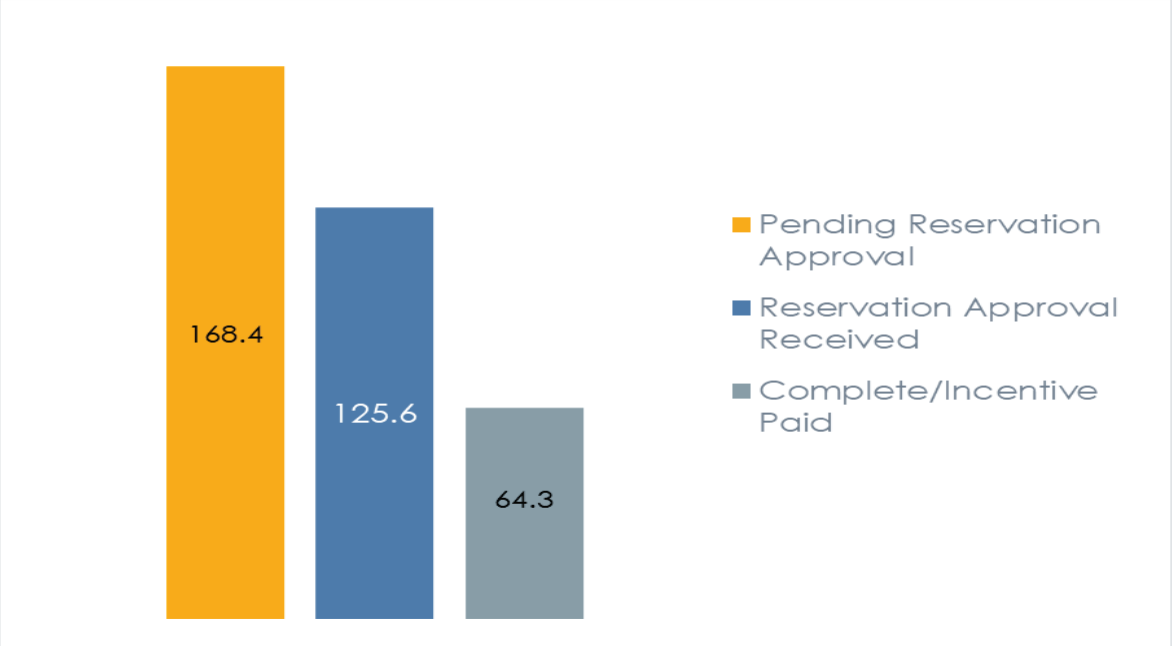
Figure 18 – Average Solar System Size (kW) by Reservation Status



N = 914

Validating each project's system size with aggregated electric consumption data from IOU data requests is a key step in the reservation request process. Historic electrical consumption directly influences the system's final size, design, and incentive calculation. Figures 18-23 show average system size for PV and integrated storage across IOU territories as well as by application milestones.

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



N= 276

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

Program	Pending Reservation Approval	Reservation Approval Received	Complete/ Incentive Paid	Cancelled/ Withdrawn
PG&E	175.3	163.0	112.4	171.4
SCE	100.7	185.2	185.2	200.3
SDG&E	150.5	164.3	125.9	138.2
Liberty Utility	0.0	103.2	0.0	93.2
PacifiCorp	0.0	0.0	0.0	111.6

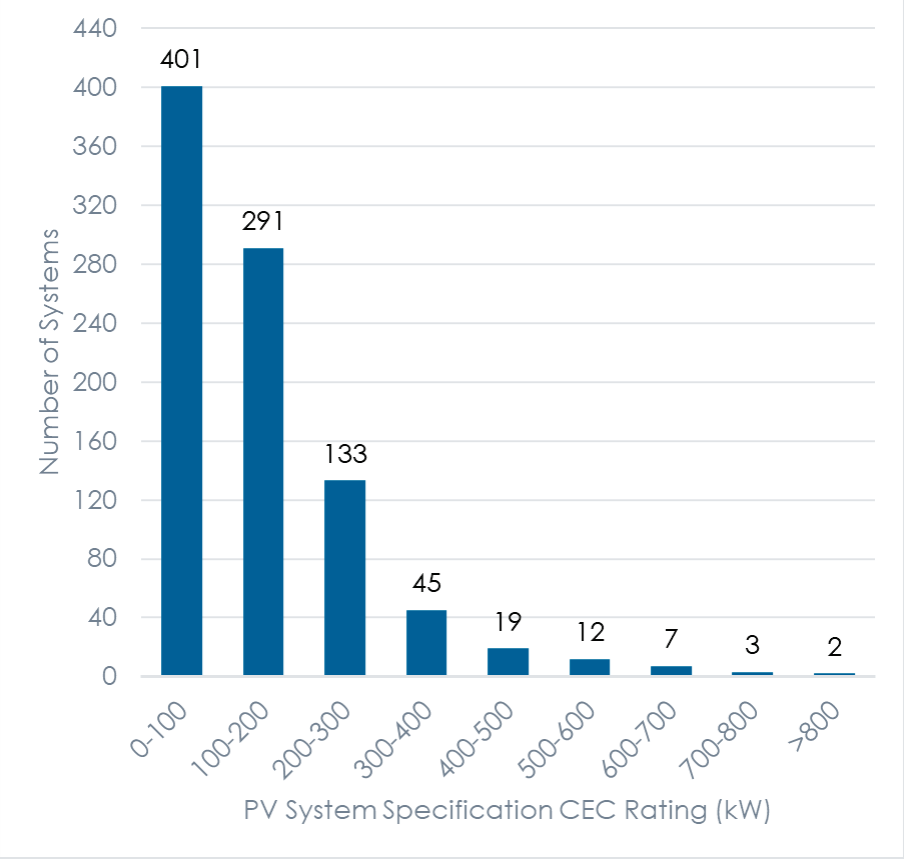
N = 1,330

Figure 21 – Average Energy Storage System Size (kW) by IOU Territory and Reservation Status

Program	Pending Reservation Approval	Reservation Approval Received	Complete/ Incentive Paid	Cancelled/ Withdrawn
PG&E	183.6	125.7	72.2	0.0
SCE	87.4	136.6	0.0	0.0
SDG&E	54.6	106.8	17.1	34.2
Liberty Utility	0.0	79.4	0.0	0.0
PacifiCorp	0.0	0.0	0.0	0.0

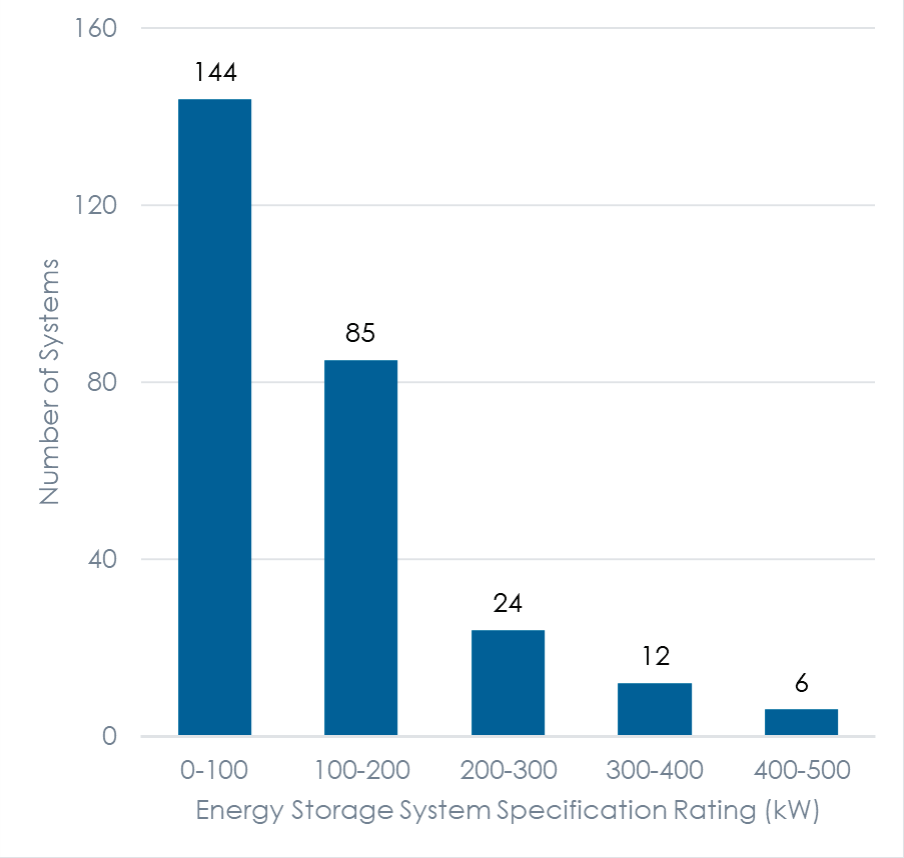
N = 276

Figure 22 – Distribution of System Sizes (kW)



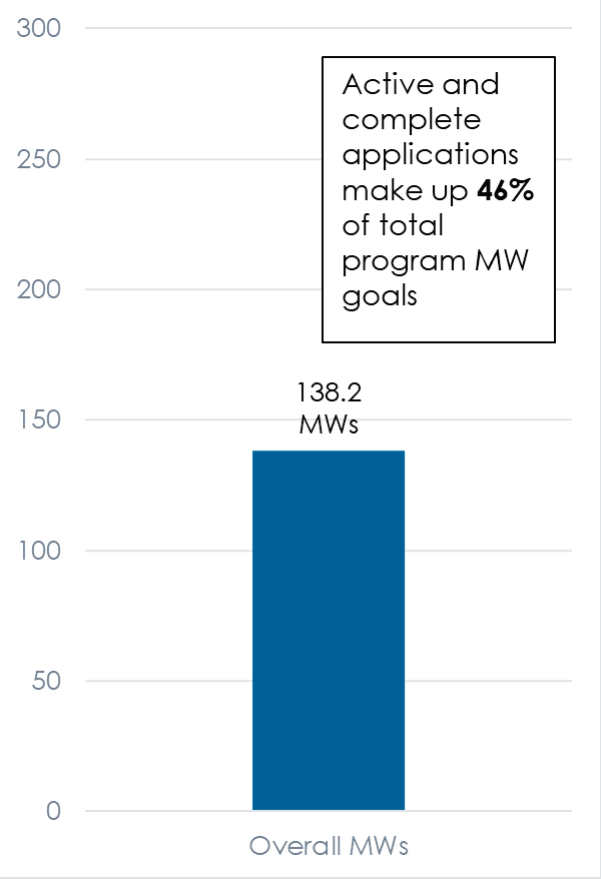
N = 914

Figure 23 – Distribution of Energy Storage System Sizes (kW)



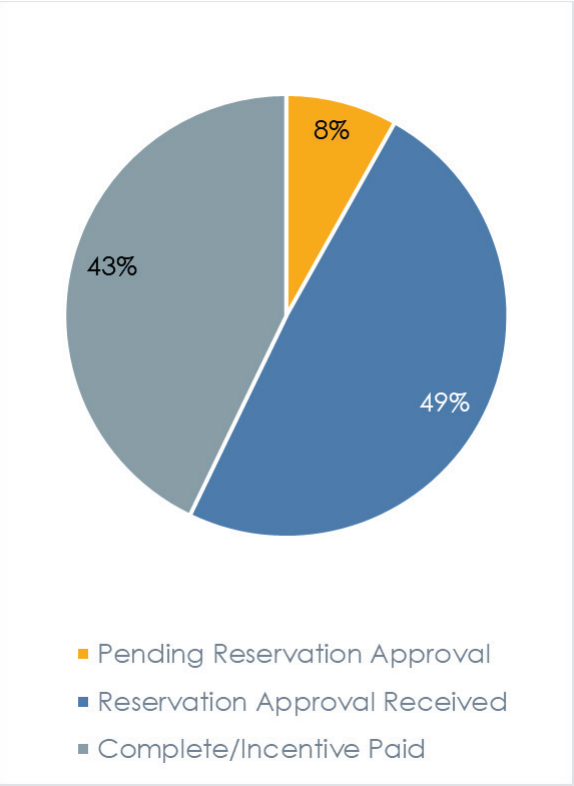
N=272

Figure 24 – Progress to 300 MW



N = 914

Figure 25 – Percentage of Program MW by Reservation Type



N = 914

The average PV system cost is $6.21/watt CEC-AC[17] with a total expected aggregated annual output of 209,090,262 kWh[18] for the active[19] SOMAH projects in queue. Completed projects made up 43% of total application volume at the close of Q2 2026. This percentage slightly increased in comparison to the ratio of active to completed applications at the end of Q4 2025, illustrating a steady influx of new applications is

[17] 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.
[18] Expected aggregated annual output is an estimate based on 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.
[19] 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.

entering the pipeline, while projects continue to reach completion at a steady rate. The percentage of projects pending reservation approval increased from 3% at the end of Q4 2025 to 8% at the close of this reporting period. This increase is likely due to the storage incentive pause in PG&E territories, which prompted an influx of application submissions from projects seeking to incorporate energy storage systems alongside their PV systems prior to the deadline of May 22, 2026. We are expecting a similar influx following the SDG&E storage pause that began July 15, 2026.

Despite the increase in application volume, the SOMAH PA has continued to prioritize efficient processing timelines and reducing administrative burdens for applicants, thereby helping projects progress to reservation approval status without significant delays. Figures 26 and 27 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.

Figure 26 – Active Project Density and Location Visualizations

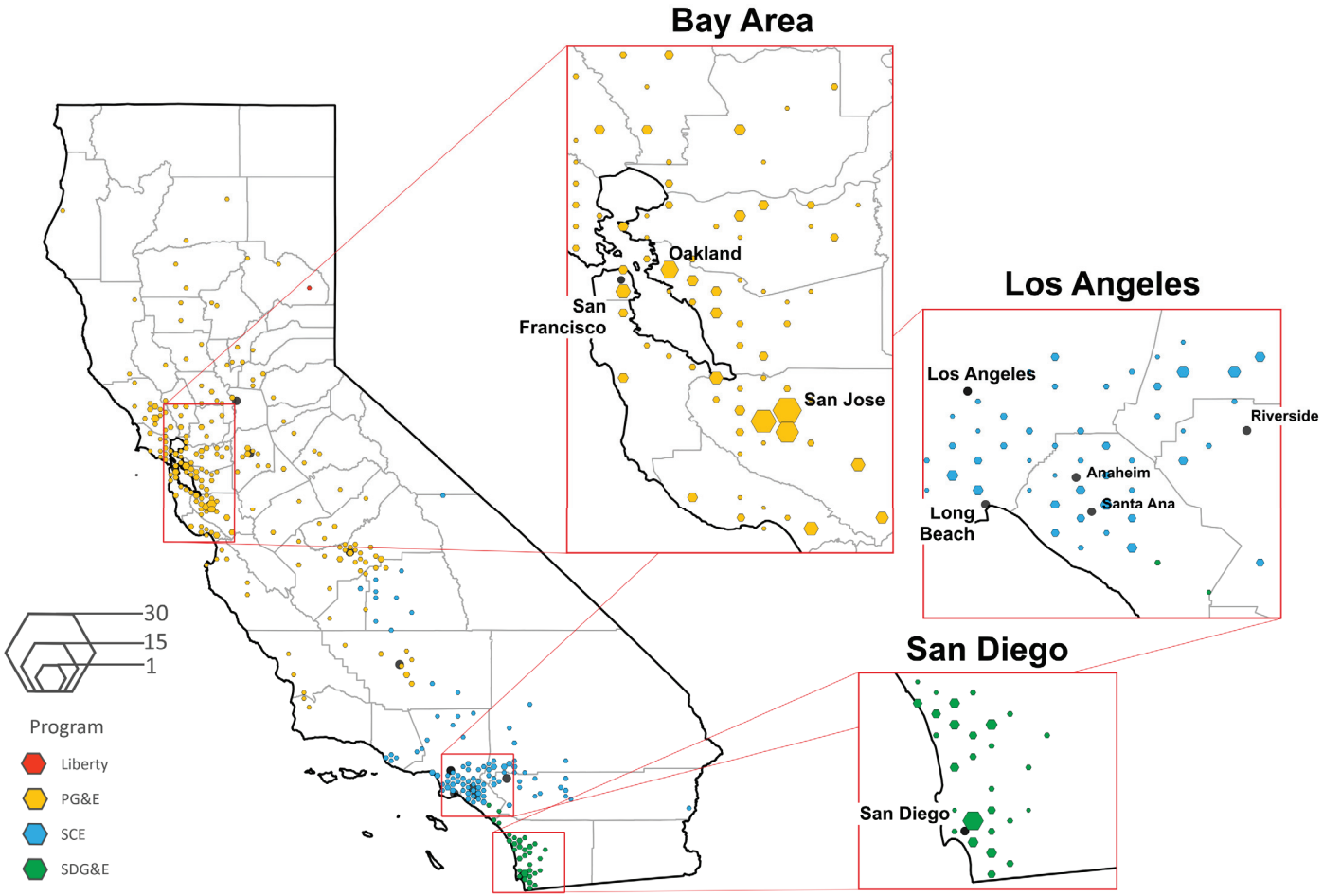
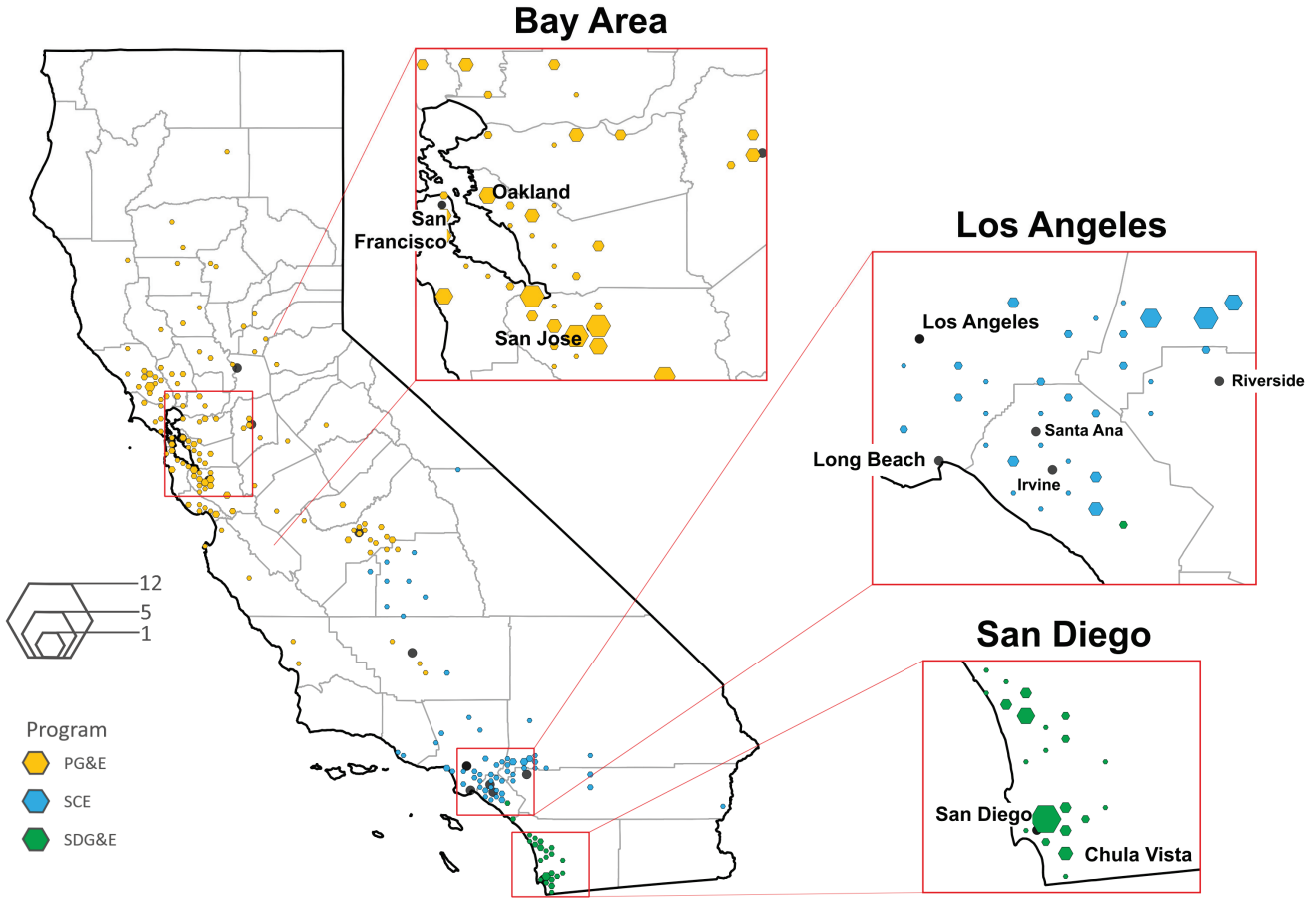


Figure 27 – Completed Project Density and Location Visualization



3.1.2 Program Payments

The Progress Payment Pathway, launched in April 2021, was designed to alleviate cash flow issues reported by participating contractors and help remove barriers to diversifying the contractor pool. 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 PPM approval, and the system has been fully installed or is 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 or 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.

To date, 523 applications have opted into the Progress Payment Pathway. Of those applications, 99 pursued incentives for their integrated storage systems. Due to the popularity of the Progress Payment Pathway and to streamline the administrative process, progress payments have become the default option pursuant to D.24-11-006. Projects are now able to opt out of the progress payment and pursue a single, final payment. The program requirements for the progress payment have not otherwise changed. Further information is in Section 4.2.1, Decision 24-11-006.

All projects requesting a progress payment are required to complete a live virtual walkthrough with the SOMAH PA to verify 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 successful 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 indicate an approved opt-in to the Progress Payment Pathway and the resulting

progress payment amount. The program's progress payment history is summarized by the following payment list:

- January–June 2026: 51 progress payments issued
- July–December 2025: 74 progress payments issued
- January–June 2025: 49 progress payments issued
- July–December 2024: 94 progress payments issued
- January–June 2024: 99 progress payments issued
- July–December 2023: 49 progress payments issued
- January–June 2023: 15 progress payments issued
- July–December 2022: 30 progress payments issued
- January–June 2022: 20 progress payments issued
- July–December 2021: 8 progress payments issued

A steady increase in progress payments has remained consistent since the program's launch. In 2026, progress payment activity remains high, with 51 progress payments completed at the close of this quarter. Of these, 45 projects have added integrated energy storage to their systems. To date, 349 of the projects that have completed the Progress Payment Pathway have reached the Incentive Claim Milestone and have received their final incentive payment. The timeline for these projects shows that progress payment allowed 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.

Payment requests for progress payments are received once the Progress Payment Pathway is approved. Based on Progress Payment Pathway approval dates, the following summarizes the program's progress payment request history since inception:

- January–June 2026: 59 progress payment requests received
- July–December 2025: 73 progress payment requests received
- January–June 2025: 66 progress payment requests received
- July–December 2024: 71 progress payment requests received
- 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

At the end of Q2 2026, six out of nine SOMAH eligible contractors with completed applications have used the Progress Payment Pathway at least once. Use of the Progress Payment Pathway has remained consistent in Q1-Q2 2026, and this trend is expected to continue through the second half of 2026. Figure 28 outlines payment milestone statistics since the launch of the Progress Payment offering, summarizing the number of progress payments and standard payments issued as well as the associated dollar amounts.

Figure 28 – Program Payment Statistics[20]

Program	Progress Payments Issued	Progress Payment Amount	Final Incentive Payments Issued	Final Incentive Payment Amount	Total Incentive Payment Amount
PG&E	351	$0	280	$27,864,194	$27,864,194
SCE	120	$60,057,031	113	$26,058,424	$86,115,455
SDG&E	51	$28,578,998	54	$8,091,074	$36,670,073
Liberty Utility	0	$0	0	$0	$0
PacifiCorp	0	$0	0	$0	$0
Total	**523**	**$88,636,030**	**447**	**$62,013,692**	**$150,649,722**

With the progress payment volume remaining high, the number of inspections also remained relatively steady throughout Q1-Q2 2026. In Q3-Q4 2025, 59 inspections were completed across PG&E, SCE, and SDG&E territories, compared with 54 completed inspections and five inspections in progress in Q1-Q2 2026. During this reporting period, the SOMAH PA completed seven inspections with storage and is in the process of completing three more. The SOMAH PA expects inspections to gradually come in throughout the year as projects continue to finish construction and reach program completion. Additionally, the SOMAH PA expects more projects with storage to enter the inspection queue as more projects add integrated storage to their SOMAH applications.

During this reporting period, the SOMAH Program has been able to maintain a consistent stream of projects reaching completion, with 59 applications receiving their

[20] Progress Payment Amount total and Final Incentive Payment Amount total include some invoiced, pending payments.

final payments. This brings the program to a total of 437 projects that have received final payments, with about 80% of these projects utilizing the two-payment pathway rather than the standard one-payment option. Looking ahead, final payment activity is expected to remain steady with six projects currently pending Incentive Claim Approval. With the increase of projects that have chosen to integrate storage with their systems, the SOMAH PA also expects to have an increase in overall dollars paid out due to additional storage incentives. The program's cumulative final payment activity is summarized as:

- June 2026: 437 final payments issued
- December 2025: 377 final payments issued
- June 2025: 314 final payments issued
- December 2024: 229 final payments issued
- 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: 1 final payment issued
- December 2020: 1 final payment issued

Not all reported projects have completed installations and received the final incentive payment, as shown in Figure 28. To date, there have been no instances of projects dropping out between approval 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 28, as well as analysis of payment timelines as additional projects are completed and paid.

Integrated Energy Storage

Projects that have added integrated energy storage to their project scope are summarized by reporting period:

- January–June 2026
  - 45 progress payments included integrated energy storage
  - 4 final incentive payments have included integrated energy storage
- July–December 2025:
  - 18 progress payments included integrated energy storage
  - No final incentive payments have included integrated energy storage

At the close of this reporting period, there are a total of $111,871,885 incentive dollars Earmarked, Pending Reservation, Reserved, and Completed for energy storage projects.

With the overwhelming storage demand in SOMAH's service territories, current applications that are claiming storage incentives have exhausted all allotted storage funding in PG&E and SDG&E territories. The PA has paused all storage additions in PG&E as of May 22, 2026, and in SDG&E as of July 15, 2026. All active and completed projects requesting storage after these dates will join a waitlist while the SOMAH PA and the CPUC continue to discuss future options.

Early Payment Pathway for Eligible Tribal Projects

As of June 30, 2026, no tribal projects have utilized the Early Payment Pathway and no tribal projects have been submitted since D.24-11-006 and Handbook 9 implemented the Early Payment Pathway for tribal projects. Even though the Early Payment Pathway increased the potential for more tribal projects, tribes continue to face barriers to eligibility including the lack of specific deed restriction documentation and the inability to meet the requirement for adjacent parcels of land per project.

Increased Incentive Reporting

As of June 30, 2026, 268 of the 280 currently active applications that requested the increased incentive were fully approved. To date, projects that received the revised incentive had an average 11% increase in total incentive. Compared to the pre-revised incentive amounts, $8.3 million more incentive dollars were allocated to applications that had their revised incentive requests fully approved. Given the milestone deadlines for the relevant applications, the SOMAH PA expects all the remaining eligible, conditionally approved applications to receive higher incentives through 2026.

Application Deposits

The electronic payment option for application deposits has remained 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. At the close of this reporting period, all but 10 incentive payments and 31 deposit fee refund payments were issued 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 reused 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 reuse forfeited deposits for project reentry 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. In Q4 2024, the first requests for deposit reuse were received. In total, at the close of this reporting period, six forfeited application deposits, totaling $27,500, have been reused. Forfeited deposit reuse represents a tangible removal of a program reentry barrier for projects that are restarting. With previously cancelled projects now having the option to reuse forfeited deposits if they re-enter the program, the PA will continue to report on deposit reuse and its relation to cancelled application re-entries reported on in Section 3.1.1, Applications and Incentive Statistics, and related outreach efforts are reported on in Section 3.2.4, Property Owners.

3.1.3 Bidding Process

Per Decision D.24-11-006, the online bidding tool was removed in July 2025. The online bidding tool was a platform used to connect property owners with eligible SOMAH contractors, providing an apples-to-apples bid comparison. With the removal of this requirement, projects receiving upfront technical assistance are no longer required to obtain three project bids. To continue supporting cost-competitive and high-performing solar PV installations, bid resources remain available to assist property owners in obtaining multiple project bids. Technical assistance can be provided to support the solicitation of project bids and to help property owners understand the potential costs and benefits associated with each option. While the online bidding tool has been removed, SOMAH continues to offer a Contractor Directory that includes all SOMAH-eligible contractors and can be used to generate a list of contractors serving the project location.

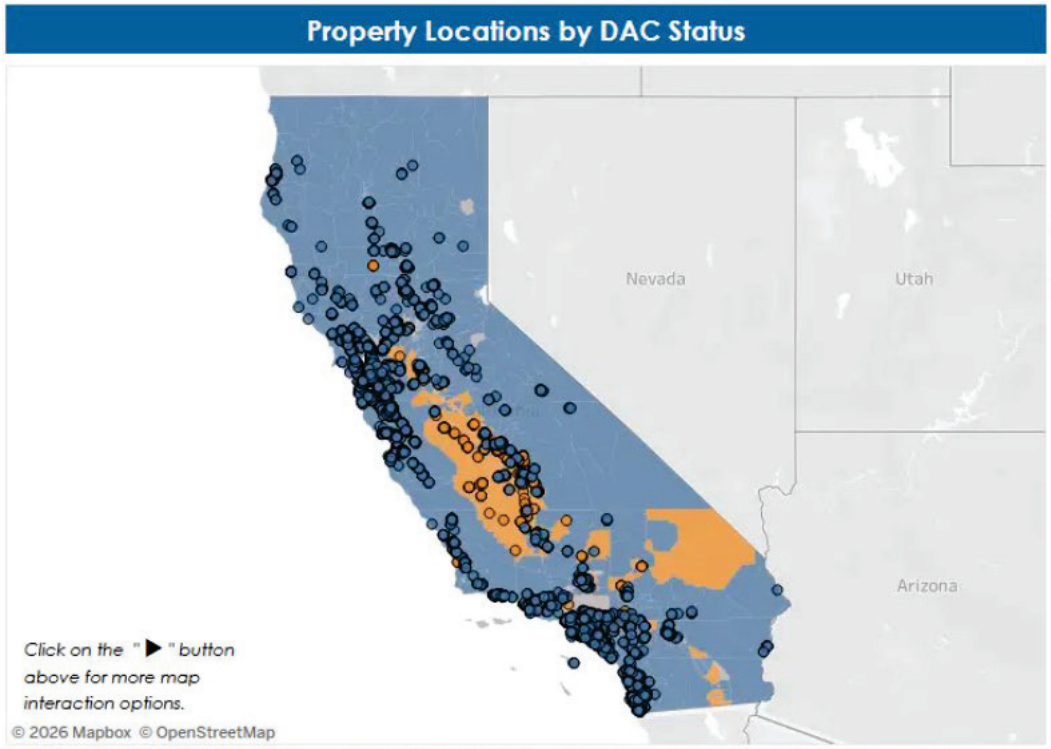
3.1.4 Eligible SOMAH Properties Map

Figure 29 provides an overview of the Eligible SOMAH Properties Map. This public resource can be found on the Eligible Properties Map page. The webpage received 657 page views in Q1-Q2 2026.

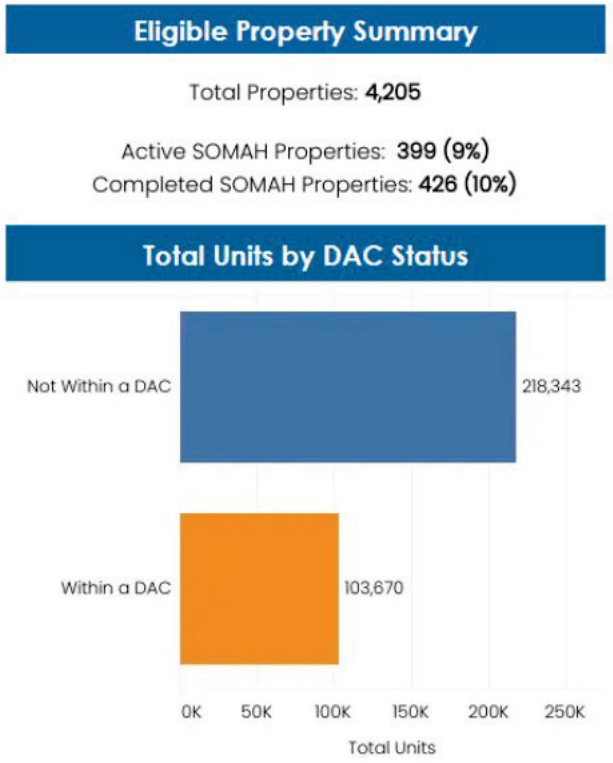
The map is based on data from the California Housing Partnership's Preservation Clearinghouse, including HUD-subsidized properties, USDA Section 515 rural properties, properties financed with Low-Income Housing Tax Credits, and local funding sources. The data has also been cross-checked with the IOU priority properties lists. The map has been fully scrubbed in Liberty, PacifiCorp, and SDG&E territories. SCE data will be fully updated by Q3 2026 while PG&E data will be finalized in 2027. The map is intended for

use by SOMAH participants for property leads and stakeholders for general stats. The SOMAH PA intends to update the underlying map data for potentially eligible SOMAH properties annually. This year's update to underlying map data will be completed in July 2026. Data on properties with active SOMAH applications was most recently updated on June 17, 2026. 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, main SOMAH eligibility requirements, legislative districts, and utility territories. The map is color-coded based on property location in CalEnviroScreen-defined disadvantaged communities, electric utility territories, legislative districts, and counties.

Figure 29 – Eligible SOMAH Properties Map



The **Property Locations by [1] Disadvantaged Community Status** map displays the location of properties likely 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 projects that are in-process (active), completed (installed and paid), waitlisted (when applicable), withdrawn, or cancelled. 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 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 gain 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. 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 (ME&O)

As the SOMAH Program increases the number of completed projects, the PA's audience engagement has emphasized program achievements through success stories and social media posts. Activities have included hosting ribbon-cutting ceremonies, participating in in-person events, and improving informational resources and tools. General messaging to increase application submissions focused on Handbook 9 changes, including integrated storage incentives, Early Payment Pathway for tribes, increased allowable project costs, such as roof repairs, and the standardization of the Progress Payment Pathway, plus federal changes such as the sunsetting of the ITC. The program celebrated many successes during this reporting period, as outlined by each audience type in Figure 30. ME&O efforts were guided by the PA's 2026 ME&O Plan and focused on 1) conducting outreach to property owners

and tribes, 2) increasing applications from new contractors and encouraging subcontractor participation, 3) providing job trainee opportunities and promoting job trainee participation, 4) revamping tenant education resources and facilitating workshops upon request, and 5) providing stakeholders with co-marketing materials.

3.2.1 ME&O Plan

SOMAH's annual ME&O Plan guides the program's ME&O activities, setting goals, objectives, and tactics to reach SOMAH's priority audiences and support the overall program goals for 2026. The ME&O Plan uses outreach tactics to increase application submissions (Goals 1, 2, and 5) and to substantiate equitable sustainability for low-income and underserved communities while supporting contractors and property owners (Goals 3 and 4) in completing program requirements.

The SOMAH PA finalized the 2026 ME&O Plan in March 2026 after a public comment period. The ME&O Plan is posted annually on the CPUC's California Distributed Generation Statistics website.

3.2.2 Monitoring, Evaluation, and Research

The SOMAH PA routinely uses mixed methods to monitor and evaluate ME&O efforts, including surveys, qualitative interviews, program data analysis, reporting, and other 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 have been issued to all SOMAH audiences at various stages, from ME&O outreach efforts through the application process to post-application. Feedback from surveys of SOMAH's key audiences is used to inform ongoing ME&O outreach efforts and the application process. See Figure 30 for a summary of ongoing and completed surveys. Some surveys previously reported on have been removed to showcase the most relevant and recent program activities.

Figure 30 – 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
Property Owners	Technical Assistance (TA)	Post-TA, pre-reservation request	Launched Q4 2021	Ongoing post-TA
Job Trainees	Job Trainee Experience Survey	Post-project installation	Q1-Q2 2022	Ongoing post-installation

ME&O Program Research

During the current reporting period, two one-on-one interviews were completed for success story testimonials while larger ME&O research was not conducted by the SOMAH PA. Previous research projects included Contractor Focus Groups and outreach interviews, 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 previous research projects. One of the interviews was conducted with the owner of Holt Family Apartments who completed a Track A application. The other was with the solar contractor Bright Power Inc. (BPI) whose interview featured a San Bernardino property that did not use the ITC.

A third-party evaluation was released in June 2026 that includes interviews with different program audiences and program partners. The SOMAH PA is required to reply to recommendations by August 10, 2026.

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.

In January 2026, per D.24-11-006, a field to capture IOU service territory was added to the Check Eligibility Form and webinar registrations. Figure 31 sums up both inbound and outbound direct points of interaction with solar contractors. The "Unknown IOU Service Territory" for SOMAH-led outreach is due to older data in the SOMAH listserv. Data will be captured in the future when a contractor engages with a new form or

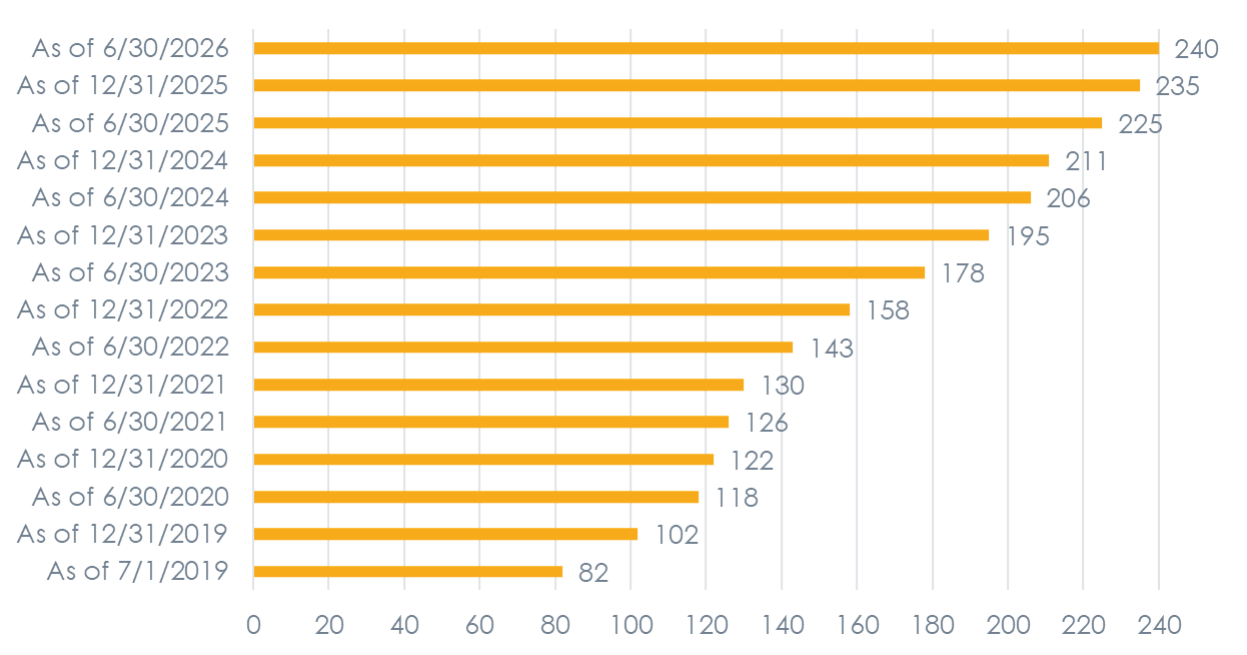
registration. SOMAH sent out several SOMAH project related emails for contractors including a callout to our SOMAH approved PPA providers, ITC sunsetting plans for successful project completions, and contractor contact update emails to keep the Contractor Directory up to date.

Figure 31 – Points of Interaction with Potential Contractor Applicants

	IOU or Tribal	Initial Interactions
Initiated by Potential Applicant	Liberty	0
	PacifiCorp	0
	PG&E	15
	SCE	7
	SDG&E	0
	Unknown IOU Service Territory	18
Initiated by SOMAH PA	Liberty	0
	PacifiCorp	0
	PG&E	37
	SCE	4
	SDG&E	1
Total		**229**

The PA continues to engage contractors through ongoing quarterly Applicant and Contractor Eligibility Trainings. During this reporting period, two general eligibility training sessions were held in February and April 2026. The applicant and contractor training sessions had a total of 18 attendees out of 54 registrants. Attendees included new contractor companies, new staff members of already eligible contractors, and representatives from energy efficiency agencies. Also, the PA held three one-on-one trainings for contractors that missed the group training and did not want to delay the process. Training session promotion included several social media posts on SOMAH's Facebook, LinkedIn, and Instagram channels. At the close of this reporting period, there were a total of 240 SOMAH-eligible contractors, as shown in Figure 32.

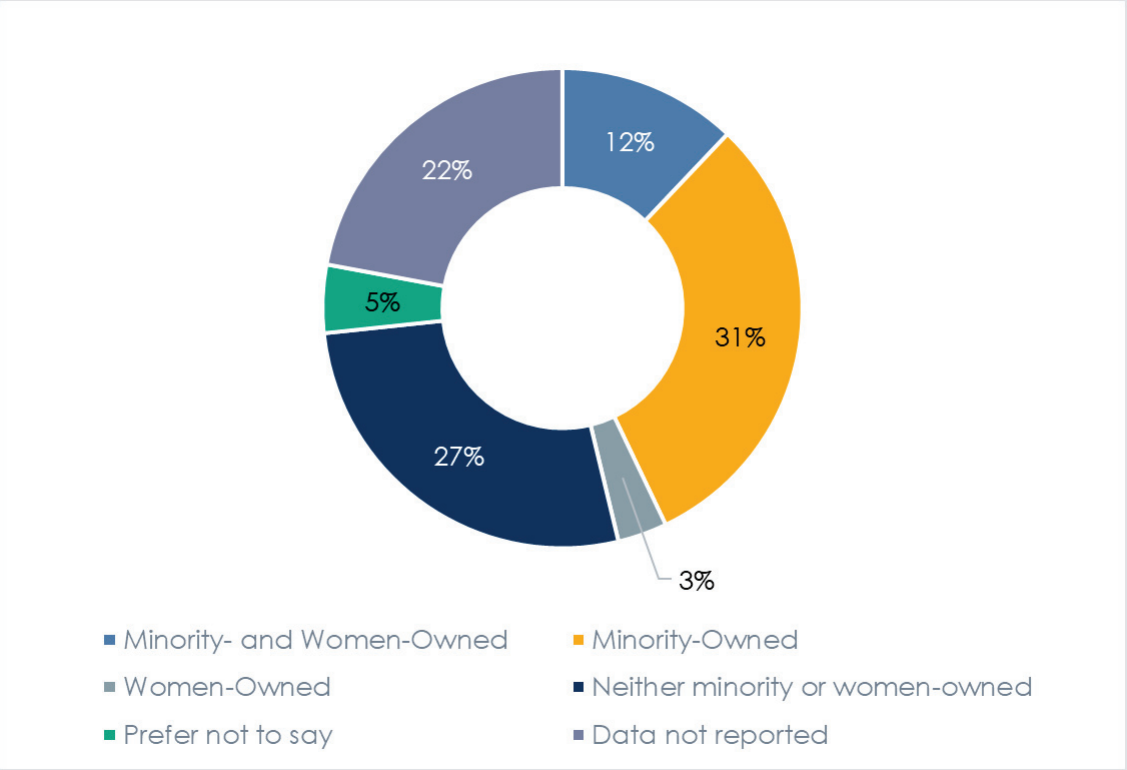
Figure 32 – Number of Eligible Contractors Over Time



During this reporting period, there were six new SOMAH-eligible contractors and an increase in Affordability Prescreen submittals. The PA continues to prioritize outreach to solar contractors to boost program participation.

During this reporting period, the PA offered one applicant and contractor office hour webinar. In May 2026, SOMAH's Office Hours Webinar discussed integrated storage, the PG&E storage waitlist process, the updated project bidding process, and available tools and resources on the SOMAH website. Seventeen contractors registered for the webinar and six attended. SOMAH plans to continue these efforts to promote engagement and inform contractors of upcoming program updates. Office hours were mentioned in the 2026 third-party evaluation as a valuable way to engage prospective contractors.

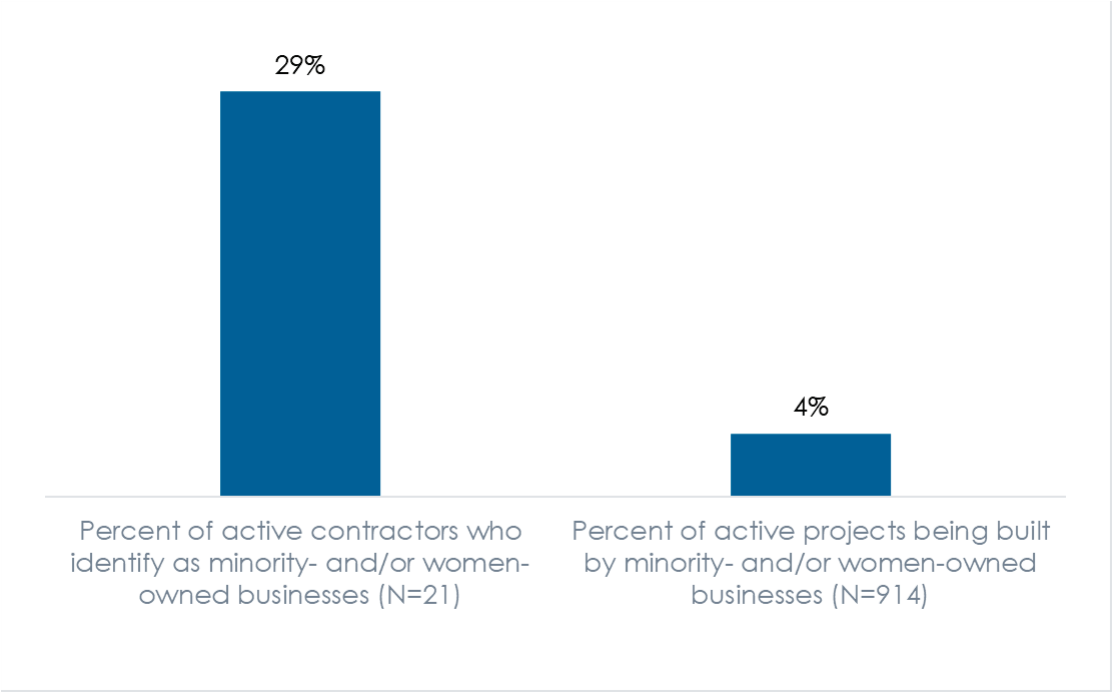
Figure 33 – Eligible Contractor Statistics



N = 240

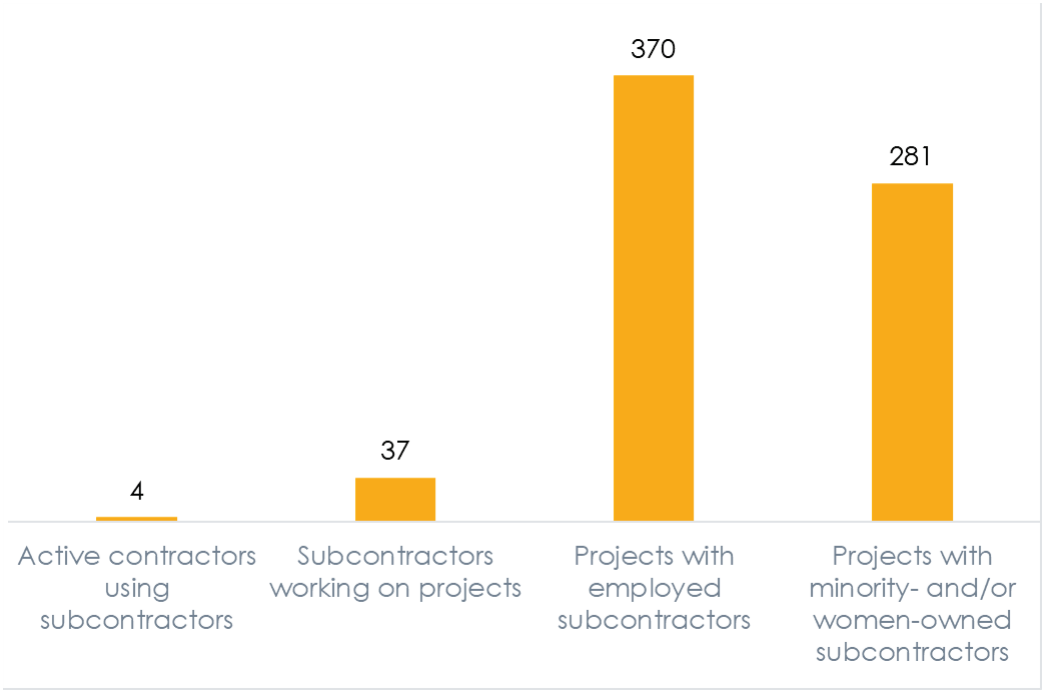
SOMAH collects self-reported contractor diversity markers for companies owned by minorities, women, and/or LGBTQIA+ as well as small companies with fewer than 25 employees. Of the 240 SOMAH-eligible contractors, 131 identify as small companies, 104 identify as minority-owned, and 38 identify as woman-owned. SOMAH worked closely with its first tribal contractor, a woman- and veteran-owned business. SOMAH hosted weekly meetings with the contractor and joined tribal council meetings with four individual tribes, leading to a new tribal application in May 2026.

Figure 34 – Active Contractor Diversity



Once a project has reached completion, the SOMAH PA receives information about subcontractors that have worked on SOMAH projects. As of this reporting period, there have been a total of 36 subcontractors that have participated in or are currently working on SOMAH projects. Currently, four contractor companies are using subcontractors for a total of 370 SOMAH projects. Increases in the number of reported subcontractors correlate with an increase in the number of projects completing installation. This is likely because prime contractors manage the application process and financial side of SOMAH projects, including managing PPAs, while subcontractors are involved with the on-site installation process. The PA is actively working with subcontractors to help them better understand the program and transition to becoming primary contractors and engaging their own projects in the program.

Figure 35 – Subcontractor Statistics



Handbook 9 changes (initiated by D.24-11-006) reengaged contractors and increased application submissions. These updates included incentives for integrated storage systems, the removal of the bidding requirement and tool, revised job trainee requirements, tenant education materials updates, and application streamlining. The PA focused on targeted outreach through informational office hours and updated resources and tools, as well as direct communication with contractors and trade allies to inform them about the new requirements and improvements offered by these program updates.

3.2.4 Property Owners

Property owner engagement was conducted in-person and through digital channels. Primary channels of engagement were direct email outreach, interest calls, email announcements through the CalSOMAH listserv, external webinars, conferences, and social media.

Per D.24-11-006, the SOMAH PA formalized how inbound and outbound property owner outreach is reported in SOMAH SAPRs. Figure 36 summarizes direct points of interaction with property owners. A field to capture IOU service territories was added to forms in January 2026 to report on inbound property owner outreach. The "Unknown IOU Service Territory" for SOMAH-led outreach is due to older data in the SOMAH listserv. Data will be captured in the future when a property owner engages with a new form or registration. SOMAH sent out several SOMAH project emails for property owners including a callout to our SOMAH-approved PPA providers, notices about the ITC sunsetting plans for upcoming projects, and program updates.

Figure 36– Points of Interaction With Potential Property Owner Applicants

	IOU or Tribal	Initial Interactions
Initiated by Potential Applicant	Liberty	0
	PacifiCorp	0
	PG&E	24
	Tribal	0
	SCE	7
	SDG&E	3
	Unknown IOU Service Territory	1
Initiated by SOMAH PA	Liberty	0
	PacifiCorp	1
	PG&E	80
	Tribal	1
	SCE	73
	SDG&E	8
Total		**433**

Direct Outreach

One of the PA's primary outreach channels is direct emails to property owners who are identified as high priority targets. These emails are sent with the intent of sharing information on the Technical Assistance and Support Services offered through SOMAH, providing program updates, and helping arrange further discussions with members of the PA on how to learn more about program eligibility and enrollment.

During this reporting period, direct outreach highlighted SOMAH's expanded eligibility requirements and targeted prospective property owners who may have been previously ineligible or reluctant to enroll because of earlier program barriers or limited offerings. Messaging featured program updates, including integrated storage incentives, coverage of additional project costs such as roof repairs, removal of the EPBB requirement in northern territories, and streamlined application processes to encourage enrollment. Figure 36 shows contact initiated by the SOMAH PA to property owners and property management companies (PMCs). A single PMC can have numerous SOMAH-eligible properties in its portfolio. The SOMAH PA intends to continue direct outreach efforts throughout the year to actively target properties that may now qualify for SOMAH. Planned activities include identifying properties in areas with low participation and working with CBOs and local governments to hold events, connect with PMCs, and perform on-site visits as well as use mailers, emails, and phone calls in a targeted process.

Additionally, the SOMAH PA conducted a campaign with quarterly direct outreach emails targeting applicants with cancelled applications. Direct outreach messaging focused on troubleshooting previous projects with Technical Assistance and Support Services and identifying other properties in company portfolios.

The SOMAH Program made significant strides to create more financial opportunities for tribal entities to take advantage of solar incentives. Last year's iteration of the handbook contained two important updates relating to tribal groups. First, it increased incentives through the EPBB calculator suspension for all tribal entities in the PG&E, Liberty, and PacifiCorp service territories. In addition, all tribes are now able to enroll in the Early Payment Pathway during the Reservation Request Milestone, which gives 60% of the incentive payment upfront. Q1-Q2 2026 focused tribal outreach via coordinated efforts with a tribal contractor partner and exhibiting at tribal-led energy efficiency events. Information shared included general SOMAH information as well as program updates per D.24-11-006.

During this reporting period, other direct outreach messaging focused on the expiration of the ITC. The ITC has proven key to funding solar systems, with 85% of active and completed SOMAH projects using it. The PA shared materials on the ITC expiration to

highlight the urgency for projects to apply before July 4, 2026. As not all projects will be viable to apply before this date, the PA also focused on identifying alternative financing opportunities for owners to utilize when they do not have the ability to cover out-of-pocket costs and do not have access to the ITC.

Property Owner Outreach Events

The PA attended two in-person conferences, one of which was targeted at tribal communities. The Tribal Leaders Energy and Safety Summit was an opportunity with the IOUs that allowed the PA to interface with tribal leaders, contractors, and other industry partners. This opportunity is in line with the PA's goal to expand the SOMAH Program to more tribal properties and develop deeper connections with contractors who directly support tribal installations. The PA made at least six contacts and yielded four email sign-ups, which included tribal housing agencies, tribal financing partners, and partner incentive programs serving tribes. Additionally, the SOMAH PA exhibited at the Housing California annual conference, which is the largest nonprofit affordable housing conference in California. In advance of the conference, the PA conducted pre-conference outreach to share information about SOMAH and invite conference attendees to meet members of the SOMAH team. In total, the PA sent 1,196 pre-conference outreach emails and yielded 62 contacts at the exhibit booth. Exhibiting at Housing California presented the PA with an opportunity to connect with asset managers, developers, property owners, and partner agencies directly in person.

- Housing California Conference (March 18 – 20, 2026)
- Tribal Leaders Energy & Safety Summit (May 18 – 20, 2026)

Social and Earned Media

The SOMAH PA utilizes social media to inform applicants about program updates and upcoming events. Social media platforms include Facebook, Instagram, and LinkedIn; the use of the X platform channel was discontinued during this period. Per D.24-11-006 requirements, the PA cannot distinguish or report on demographic information of followers. Therefore, the PA data reported in Figure 37 is on general follower numbers per platform.

Figure 37 – Social Media Followers

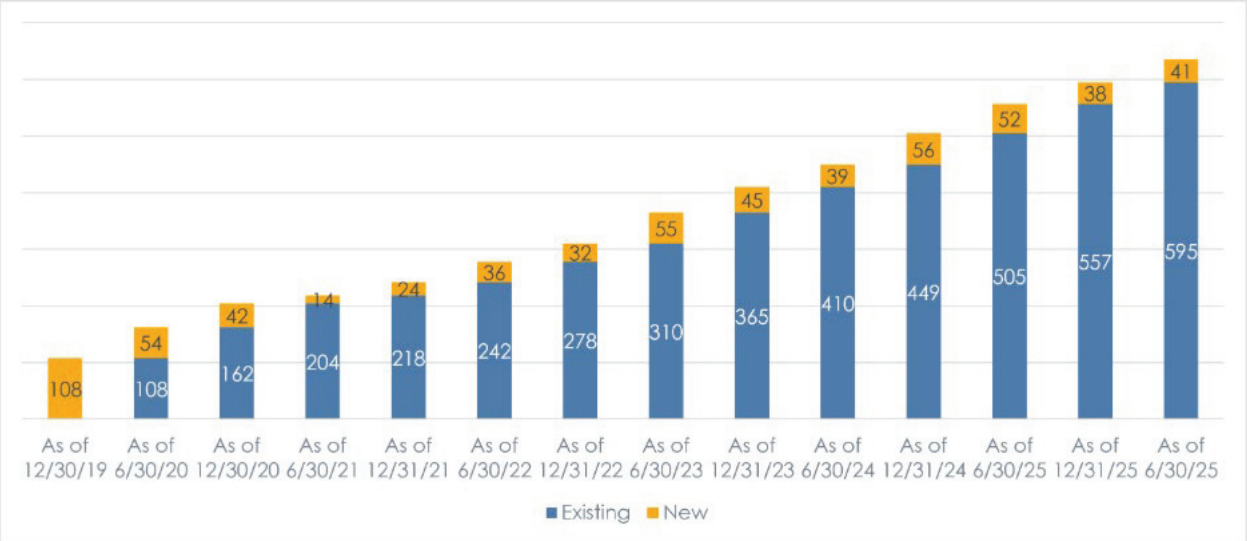
Facebook	Instagram	LinkedIn
119	187	573

During this reporting period, SOMAH generated 27 media mentions with an estimated online audience of more than 406 million unique monthly visitors. Despite the broad potential reach, overall engagement was minimal, totaling just six interactions, and five journalist shares. Coverage was largely driven by a wave of stories repeating allegations made by CAL Department of Government Efficiency (CAL DOGE), with most articles appearing in small, ideologically aligned outlets that offered little original reporting or independent analysis. The highest visibility came from syndicated versions of the same story published by outlets such as the New York Post and Yahoo.

Outside of the CAL DOGE narrative, coverage included several positive and informational mentions of the program. These highlighted SOMAH's role in expanding access to clean energy for affordable housing residents, including coverage of the Bishop Paiute Tribe's solar installation, a feature on farmworker households benefiting from solar, updates from the City of South Gate, and reporting on Center for Sustainable Energy's position regarding proposed program changes. Overall, the reporting landscape focused on the program's ongoing implementation and community benefits.

The CalSOMAH email listserv provides important program updates, including funding announcements, program changes, and alerts about upcoming events and webinars. The listserv added 41 additional property owners during this reporting period.

Figure 38 – Property Owner Subscribers Over Time



3.2.5 Tenants

The primary objective of tenant education is to ensure residents of participating properties are aware of the program and able to benefit from SOMAH in an equitable manner.

Tenant Education Services

Decision (D).24-11-006 eliminated tenant education requirements. For projects already in the queue, the SOMAH PA provided Tenant Education Services through quarterly tenant education trainings, webinars and maintenance of the Tenant Education Hotline. In Q1-Q2 2026, the SOMAH PA received two phone calls to the tenant hotline from two unique callers. One of the calls was directly connected to a SOMAH project.

Two in-person tenant education workshops were held during this reporting period. One in-person education workshop was located at Rancho Vista, a property in Ontario, CA. The event was an open house and ribbon-cutting, which featured both contractors and property owners connected to the project. Tenant education resources were provided in English and Spanish, and nine tenants were directly engaged by the SOMAH PA. One in-person education workshop was located at Lincoln Plaza, a property in Hanford, CA. Tenant education resources were provided in English and Spanish, and Spanish interpretation was provided by SHE, a community-based organization partner that planned and facilitated the workshop and directly engaged tenants.

The SOMAH PA continues to review tenant education affidavits to ensure the tenant education requirement for contractors and property owners is met (applies only to projects that submitted applications prior to the removal of the requirement). In Q1-Q2 2026, 58 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 successfully revised the Tenant Education Toolkit and Tenant Education Services, which are available for stakeholders on the SOMAH website and allows for tenants to continue to learn about SOMAH, even if they live in a building that submitted an application after the decision to eliminate tenant education. In June, a marketing email was delivered to 709 contractors and property owners to increase awareness of changes and resources. Revisions incorporate the removal of the tenant education requirement as well as recommendations for improvement from previous evaluations and findings from tenant surveys.

Interconnection Impacts on Tenants

As more SOMAH projects reach completion and interconnect with the IOUs, more tenants are becoming aware of the solar projects at their properties and how they will benefit. With the increase in completed projects, the SOMAH PA is actively tracking the amount of time needed for projects to receive interconnection and the time from interconnection to receipt of bill credits. Recent data shows that for completed SOMAH projects, the timeline from construction start to interconnection is averaging 8.8 months for the larger IOUs (PG&E, SCE, SDG&E). Additionally, the average amount of time for residents to receive bill credits after interconnection is 2.2 months.

Tenants are central to the SOMAH Program, and the economic relief SOMAH aims to provide tenants is delayed when there are extended timelines for tenants to receive bill credits. The SOMAH PA will continue to work with the IOUs and the CPUC to speed up the interconnection process and shorten the time it takes for tenants to see bill credits—helping ensure the program meets its objectives.

3.2.6 Stakeholders

This reporting period, stakeholder outreach by the SOMAH PA decreased and was primarily led by SOMAH contracted CBO partners as prior efforts by the PA have led to minimal co-marketing opportunities. However, stakeholder partnerships have strengthened the credibility of the SOMAH Program. SOMAH stakeholders include local government offices, IOUs, CCAs, Regional Energy Networks (RENs), and California energy efficiency program administrators. The goal of stakeholder outreach is to spread awareness of the SOMAH Program and prompt actions such as co-marketing to reach potential participants and ultimately generate new projects.

The SOMAH PA and CBO partners engaged in activities across these key focus areas, including collaborating with energy efficiency programs and the IOUs, holding one-on-one meetings with local stakeholder offices, and developing co-marketing materials. The following sections summarize the PA & CBO's accomplishments in Q1-Q2 2026.

IOUs

Throughout this reporting period, the SOMAH PA maintained collaboration with the IOUs: Liberty Utilities, PacifiCorp, PG&E, SCE, and SDG&E. Per D.24-11-006, the IOUs worked more closely with the PA to decide activities for 2026 co-marketing opportunities, such as IOU news articles featuring SOMAH, social media posts, tribal liaison collaboration, IOU website updates, and possible webinars hosted through IOU channels. The IOUs were waiting for a new CPUC decision to promote, but only a proposed decision was released in this reporting period.

D.24-11-006 also established the high priority properties lists and directed the IOUs to scrub SOMAH property data for potential ineligibility of properties, including flagging properties that are master metered and those that already have solar. As the information is vetted, the PA has been cleaning up internal property data sets and the public-facing SOMAH eligible properties map. This effort will help the PA and contractors contact eligible property owners. The PA also meets biannually with MFES leads and their CPUC representatives to discuss co-enrolled projects, cross-program coordination, and co-enrollment and program barriers.

In addition, the PA continued to track co-enrollment with the MFES Program. SOMAH has been collecting project referrals from the MFES Program and plans to develop a case study of exemplary projects that have co-enrolled and leveraged incentives from both programs.

This reporting period, SOMAH's SDG&E IOU partner connected the United Women of East Africa to the property owner team for a joint meeting to provide an overview of the SOMAH Program. The call identified pathways forward to establish SOMAH eligibility and the PA team followed up with relevant property owner information to continue working for successful enrollment. This was the first instance where a potential property was connected through an IOU partnership.

Local Governments and Elected Officials

During this reporting period, the PA fostered relationships initiated by the City of Davis and the City of South Gate to promote SOMAH via mailers and excerpts on their websites. Follow-up efforts to coordinate property outreach with city officials will continue through the remainder of 2026 to help capture property owner interest in these communities with lower program engagement.

The CBOs continue to strengthen their existing stakeholder network and make new connections, including:

- Self Help Enterprise (SHE) had a meeting with the City of Fresno Sustainability Division Manager to discuss potential educational workshops on multifamily sites within the Central Valley.
- Orange County Goes Solar (OCGS) met and worked collaboratively with City of Long Beach District 1, Councilmember Zendejas' team, to host a luncheon for property owners at Long Beach City Hall. They are working with Councilmember Zendejas' team to explore co-marketing on the councilmember's website or through the City of Long Beach. OCGS was introduced to the Jamboree Housing Asset Manager and Assistant Manager through Councilwoman Melinda Lui. They had a meeting with these Jamboree representatives to discuss potential

collaboration between the SOMAH Program and Jamboree Housing's portfolio. OCGS continues to work closely with Councilmember Susan Sonne of Buena Park to strategize on innovative ways to inform Buena Park property owners about the program so that they can participate. Lastly, they presented to the City of Irvine's Sustainability Commission about the program and shared success stories about Irvine properties that have participated in SOMAH.

3.3 Workforce Development

A central objective 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 those who experience barriers to entering the solar workforce. The SOMAH PA continues to achieve this goal by:

- Conducting targeted outreach to job training organizations (JTOs) across the state to engage prospective job trainees and create or enhance sustainable partnerships.
- 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 training requirements are met effectively.

Job Training Organization Outreach & Job Trainee Engagement

Completed or nearly completed SOMAH projects have created 1,094 job opportunities and 68,800 trainee hours. The current SOMAH application pipeline is projected to create 1,664 job training opportunities and 107,400 trainee hours. To broaden SOMAH's pool of eligible job trainees, the SOMAH PA also continues to focus on outreach to JTOs that serve priority populations, such as justice system-impacted individuals, trainees residing in rural areas, and tribal communities.

There are 95 active JTOs in the JTO Directory. In this reporting period, the SOMAH PA continued to prioritize existing JTO partnerships. The SOMAH PA delivered presentations on SOMAH job training opportunities to three cohorts of JTO programs. Forty-nine new trainees were added to the SOMAH Job Training Portal for a total of 683 job trainees on

the portal. In this reporting period, the SOMAH PA facilitated four requests for support from JTOs, and six requests from trainees and prospective trainees.

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 has sought to increase 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.

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 this reporting period, the SOMAH PA facilitated seven requests for support with job training requirements from SOMAH contractors.

In addition, 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 2026, the SOMAH PA hosted a Job Training Overview webinar for contractors that detailed SOMAH's job training requirements and the program's workforce development resources and services. Contractors were provided with a detailed demonstration of the Job Training Portal and how to leverage it to help meet their job training requirements.

3.3.1 Local Hiring and Job Training Data

During this reporting period, the SOMAH PA received 59 Job Training Affidavits from projects that reached the Incentive Claim Milestone for a total of 437 projects that have submitted affidavits. The Job Training Affidavits submitted in Q1-Q2 2026 collectively report 108 job training opportunities. To date, 53% of trainees have worked on more than one SOMAH project, gaining enhanced hands-on experience and solar installation skills.

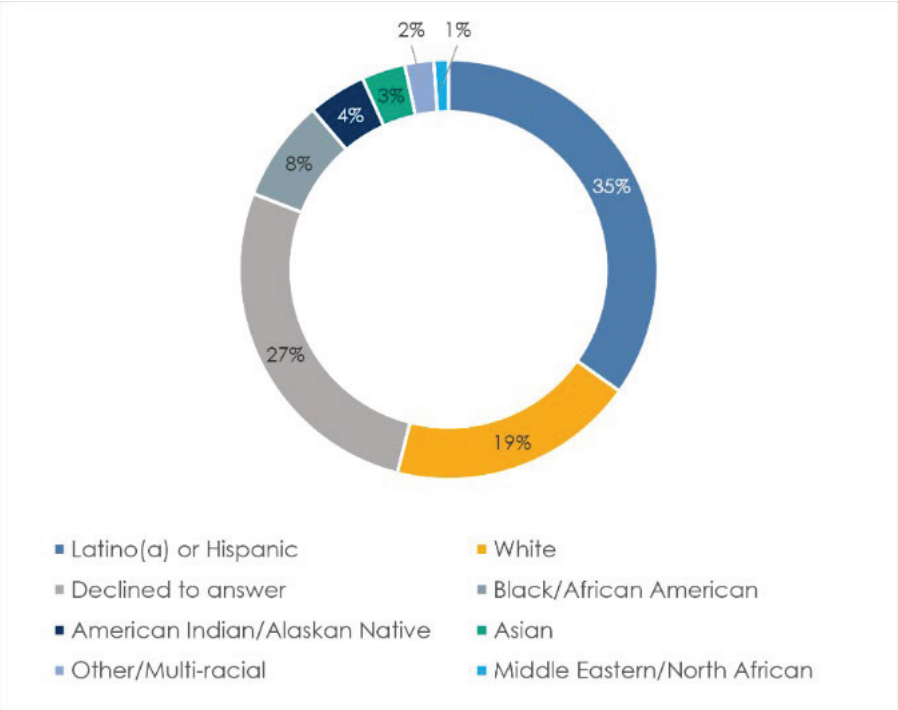
The SOMAH PA has collected and analyzed demographic information for 99 of the 168 job trainees hired through the Job Trainee Intake Form (Figures 39-41 depict findings). Data on job trainee advancement (i.e., the number of SOMAH trainees who became full-time solar employees) and retention is collected through surveys to contractors after each project reaches the Incentive Claim Milestone. To date, the SOMAH PA has received 1,250 job training surveys, with 62 job trainees reported as hired by contractors for continued employment. The following statistics provide a breakdown of local and targeted hires:

- 37% of job trainees were targeted hires.[21]
- 35% of job trainees reside in DACs.
- 15% of job trainees were local hires[22] living in the same county as the SOMAH project.
- 35% of job trainees reported being unemployed or underemployed at the time of SOMAH intake.
- 31 tenants of SOMAH properties participated as job trainees.
- 44 job training organizations have students or graduates who have participated in SOMAH job training opportunities.
- Average trainee hourly wage: $47.29.
- Average training hours per project per trainee: 66.

[21] **Targeted hires** include residents of disadvantaged communities (per CalEnviroScreen eligibility), affordable housing residents, women, people of color, adults with four or more Adverse Childhood Experiences (ACE) score, and other individuals who have faced or who have overcome at least one of the following barriers to employment: being homeless, being a custodial single parent, receiving public assistance, lacking a GED or high school diploma, participating in a vocational English as a second language program or an English Language Learner (ELL), or having a criminal record or other involvement/engagement with the criminal justice system, and may or may not live within the county in which the SOMAH project is taking place. Adverse Childhood Experiences (ACEs) are categorized into three main themes before the age of 18: **Abuse**, **Neglect**, and **Household Challenges**. https://www.cdc.gov/violenceprevention/aces/about.html Many modern public health systems and the World Health Organization have expanded the criteria to include community-level and structural traumas. Please visit https://www.cdc.gov/aces/communication-resources/index.html for a full list of themes.

[22] **Local hire** is defined as an individual who is domiciled within the county in which the SOMAH project is taking place.

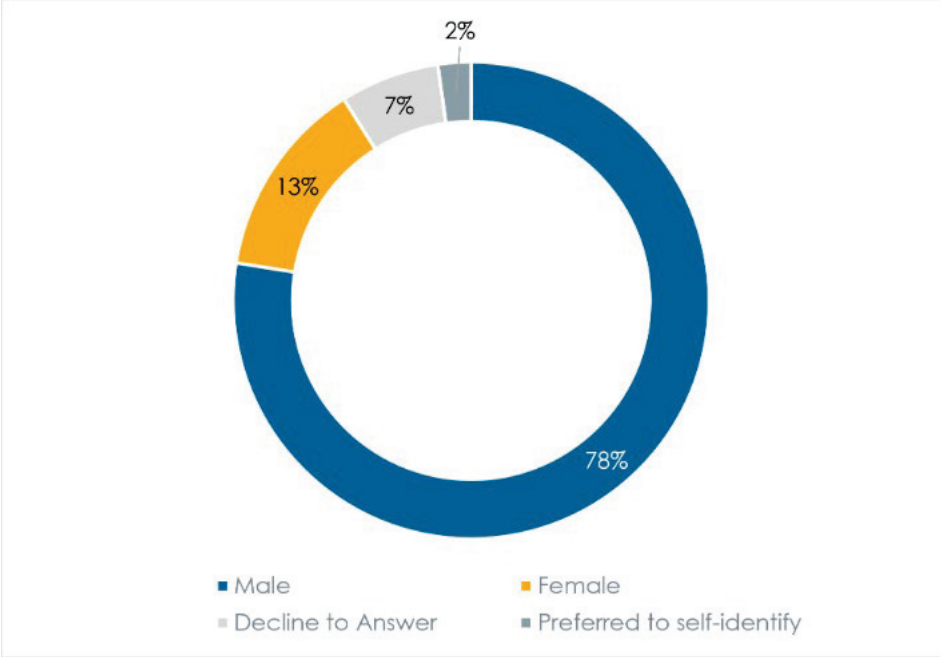
Figure 39 – Job Trainee Race/Ethnicity Breakdown



N=89

Figure 39 is a snapshot of SOMAH project job trainee breakdown by race/ethnicity. Latino(a) or Hispanic trainees make up the largest share of SOMAH trainees, totaling 35%.

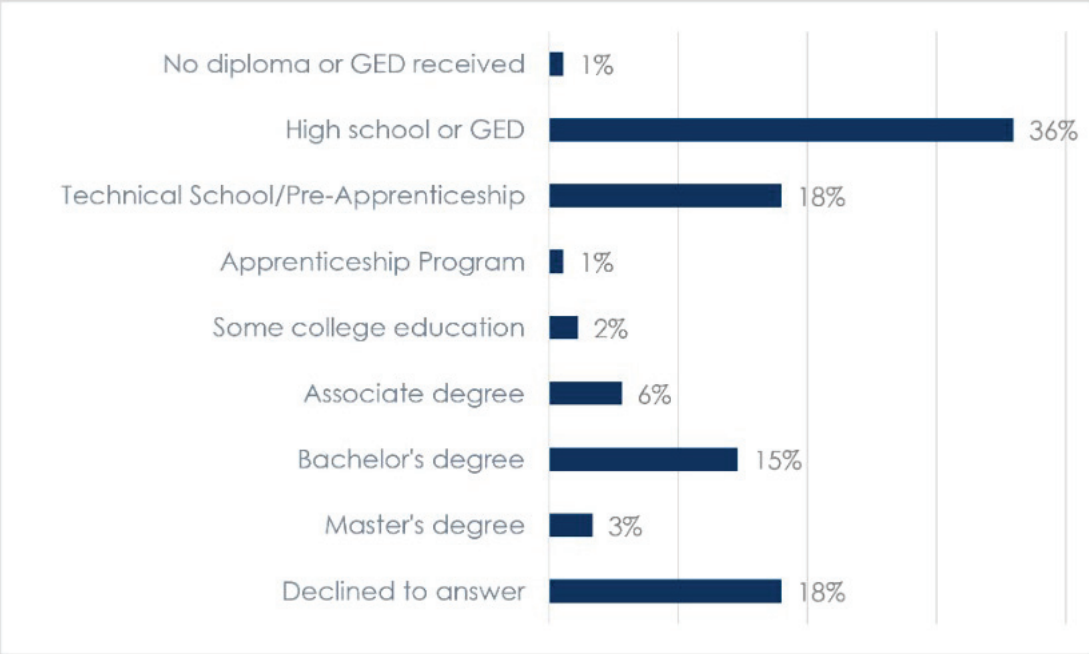
Figure 40 – Job Trainee Gender Breakdown



N=89

Figure 40 is a snapshot of SOMAH project job trainee breakdown by gender. Most trainees (78%) identify as male, while 13% identify as female.

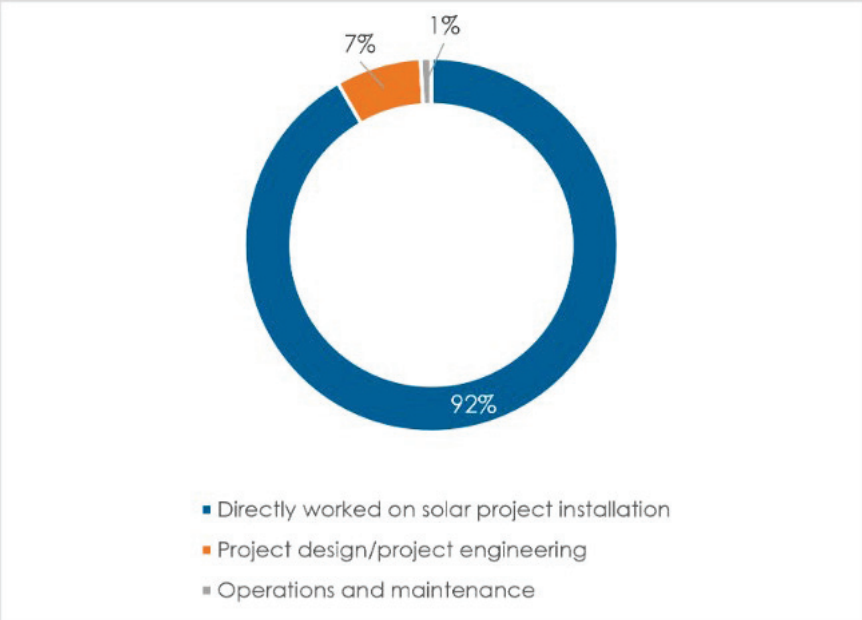
Figure 41 – Highest Level of Job Trainee Education



N=89

Figure 41 is a snapshot of SOMAH project job trainee breakdown by the highest level of education attained. A total of 58% of job trainees participated without a college degree, while 19% of trainees participated after attending a technical school/pre-apprenticeship or apprenticeship program.

Figure 42 – Percentage of Trainee Placements by Project Role



N=108

Figure 42 is a snapshot of SOMAH project job trainee breakdown by project role placements, with 92% of tasks assigned being directly related to solar installation.

Figure 43 – Average Trainee Wage Compared to CA Minimum Wage

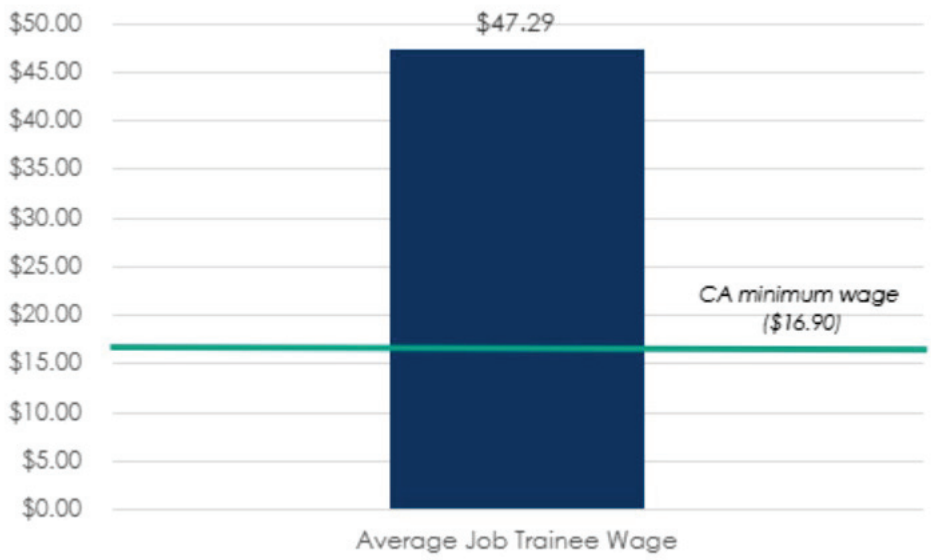


Figure 43 is a snapshot of SOMAH project job trainee average wage relative to California's minimum wage. On average, SOMAH job trainees earn $47.29/hour, greatly surpassing the California minimum wage of $16.90/hour.

The SOMAH PA does not oversee compliance with prevailing wage requirements and does not report on those wages.

Figure 44 – Hours per Job Trainee Placement

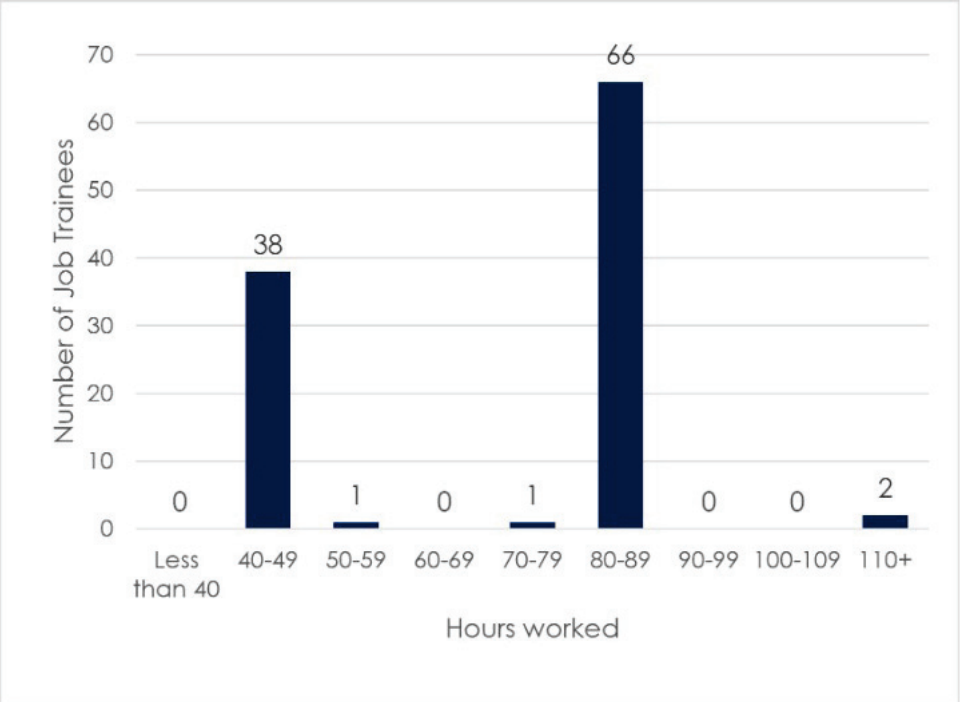
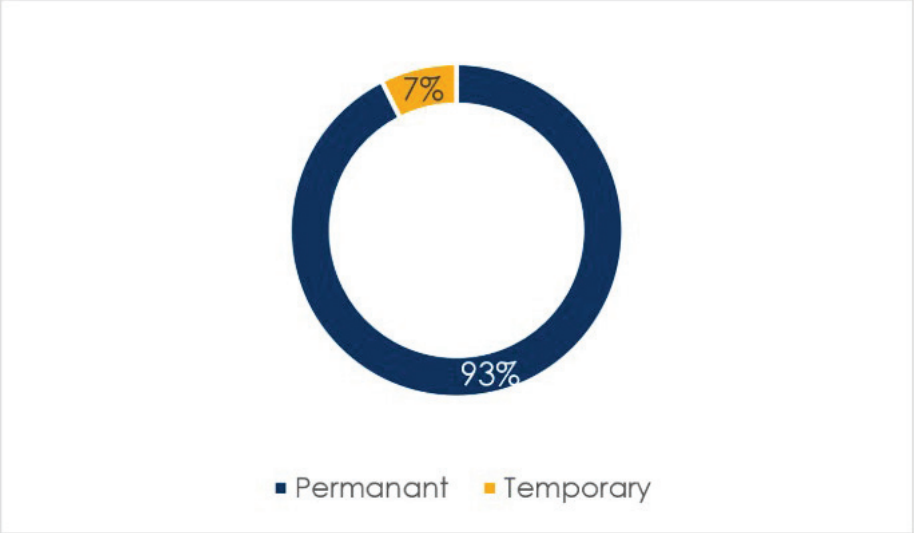


Figure 44 is a snapshot of the number of SOMAH job trainees and the hours they worked. Most trainees worked more than 80 hours on their project, with 61% of trainees working 80-89 hours and 35% of trainees working 40-49 hours.

Figure 45 – Percentage of Trainee Placements by Employment Status



N=108

Figure 45 shows the SOMAH project job trainee breakdown by employment status for this reporting period, with 7% of trainees classified as temporary workers during their time with a contractor and 93% hired as full-time employees.

3.4 Community-Based Organizations

CBO partnerships have proven valuable in expanding targeted outreach to multifamily affordable housing providers, tenants, local stakeholders, and potential job trainees across the state. Five community-based organizations continue to support the program by helping ensure SOMAH outreach messages and materials are clear, accurate, and informative, and responsive to community needs.

Communities for a Better Environment (CBE), one of the environmental justice organizations that have supported the implementation of the program, concluded its formal partnership at the end of March. A new partner, Power Direct Energy, started on-site property outreach in San Diego County at the end of April and in San Bernardino in June.

CBOs conducted 996 outreach activities to engage property owners through cold calls, emails, mailers, one-on-one meetings, presentations, ad campaigns, social media posts, and on-site property visits.

Figure 46 shows the number of direct points of contact with property owners in CBO partners' service areas, covering the Central Valley, Central Coast, South/Southeast Los Angeles, and Orange, Riverside, San Bernardino, and San Diego counties.

Figure 46 – Points of Interaction with Potential Property Owner Applicants

	IOU	Initial Interactions (Number of Properties)
Initiated by SOMAH CBO	PG&E	46
	SCE	622
	SDG&E	351
Total		**1,019**

The Niles Foundation (TNF) continued its series of property owner-focused luncheons in February, held at the Maxwell House in Pasadena. The audience included property owners in the SCE region, with 29 registrants and 13 representatives in attendance. Orange County Goes Solar (OCGS) held a luncheon in partnership with District 1 Councilwoman Zendejas to bring in property owners in the Long Beach area to learn about the program. The audience included six City staff within the SCE region, with five registrants.

During this reporting period, CBOs attended four external events aimed at engaging with property owners and stakeholders, raising program awareness, and generating new applications:

- Community Environmental Council (CEC) attended the HOME for the New Year 2026 in January 2026 hosted by Housing Opportunities Made Easier (HOME)(SCE). They were able to connect with Ventura County Supervisor Vianey Lopez.
- Orange County Goes Solar (OCGS) attended the Rental Housing Show 2026 in March 2026 hosted by the Apartment Association of Orange County (SCE). They were able to connect with representatives from Families Forward and Orange County Housing Authority.

- Self-Help Enterprise (SHE) attended the San Joaquin Valley Housing Collaborative Networking Event in March 2026 hosted by San Joaquin Valley Housing Collaborative (SCE & PG&E). They were able to connect with representatives from CCRH California Coalition for Rural Housing, Upholdings LLC, Stanislaus Equity Partners, San Joaquin Valley Housing Collaborative, Enterprise Community Partners, SoCal REN, Kern Housing Authority, Visionary Home Builders, and City of Bakersfield.
- The Niles Foundation (TNF) attended the 2nd Annual Urban Renewable Energy Summit in April 2026 hosted by Minority Renewable Energy Project of California (SCE).

CBO partners continue to engage with local stakeholders to explore potential co-marketing opportunities and introduce the SOMAH Program to their constituents. During this reporting period, CBOs participated in 15 outreach activities to engage with local government stakeholders through emails, meetings, and events.

CBOs led one Tenant Education workshop for residents where they answered attendee questions, mostly focused on changes at their property and their utility bills. SHE also provided a Tenant Education workshop at another property (SCE). SOMAH workforce development support is closely tied with tenant education, giving CBOs a means to share job training resources and highlight program elements such as the HeatSpring Academy and the Job Training Organization Directory, when applicable.

CBOs' scope of work also includes contractor engagement. During this reporting period, CBOs participated in 28 outreach activities that engaged contractors in the Central Coast, informing them about the program and upcoming Applicant and Contractor Eligibility Training Webinars. Three contractors confirmed through email that they would attend the February webinar.

The SOMAH PA hosted two virtual summits in February and June. These half-day events brought together partners and program administrators to share program updates, lessons learned, and potential opportunities. Topics covered included:

- CBO Resource Hub Updates
- Salesforce
- Property Owner Outreach
- Triennial Evaluation Findings and Recommendations

For the remainder of the year, CBO partners will continue prioritizing in-person engagement with property owners, strengthening stakeholder relationships, creating new co-marketing opportunities, and educating tenants about the benefits of solar at their properties.

3.5 Technical Assistance

Technical Assistance (TA) remains a critical component of the SOMAH Program, helping multifamily affordable housing property owners and solar contractors navigate the technical, financial, and operational complexities associated with developing and operating solar PV projects. By providing no-cost, objective technical expertise and individualized support, SOMAH helps program participants overcome these barriers and advance projects that may not otherwise move forward.

Throughout the program, property owners and contractors have consistently identified SOMAH's TA services as a key factor in their ability to evaluate project opportunities, make informed decisions, and successfully participate in the program. By providing support related to project feasibility, financial analysis, energy storage integration, utility interconnection, and referrals to complementary energy efficiency programs, TA helps reduce program participation challenges and supports successful project development. TA also serves as an important consumer protection function by providing multifamily affordable housing owners with access to unbiased technical expertise. This allows property owners to better assess project proposals, understand available options, and evaluate project opportunities that support tenant and property owner interests.

As SOMAH expands to include integrated energy storage, TA continues to play an important role in helping program participants understand and meet evolving project requirements and take advantage of new opportunities. Property owners and contractors are increasingly seeking guidance related to storage design, utility interconnection processes, and operational strategies, as well as navigating new program requirements. Through ongoing technical support and educational resources, SOMAH helps participants integrate solar PV and energy storage technologies while maximizing project benefits. By helping projects progress from initial exploration through long-term operation, TA remains a foundational tool for expanding access to solar and storage benefits for low-income communities across California.

3.5.1 TA and Support Services

Technical Assistance (TA) and Support Services provide property owners and solar contractors with access to objective expertise and individualized guidance throughout all stages of project development and operation. During the reporting period, the SOMAH PA responded to 36 TA and support services requests representing 52 distinct areas of support. Requests were submitted by both property owners and solar contractors and addressed a range of technical, operational, and programmatic challenges.

General Support remained the most frequently requested service type, accounting for 25% of all support requests received during the reporting period. Program participants sought assistance understanding program requirements, navigating project-specific challenges, and identifying available SOMAH resources. The continued demand for General Support demonstrates the ongoing value of providing participants with a trusted source of objective information and technical expertise.

The requests received during the reporting period demonstrate how TA supports participants throughout the project life cycle. Of the 36 requests received, 22 were associated with active SOMAH projects, while the remaining requests supported prospective participants evaluating solar opportunities, preparing to enroll in the program, or considering program enrollment. Common support topics included system monitoring, contractor bidding, interconnection assistance, TA Preview Reports, and energy storage integration.

System monitoring emerged as a significant area of support (19%) during the reporting period. One property owner sought assistance evaluating the performance of a portfolio of more than 20 completed SOMAH projects, resulting in support requests covering 10 individual properties. The SOMAH PA reviewed system performance since permission to operate, evaluated contractor obligations across projects installed by multiple contractors, reviewed warranty and performance guarantee provisions, and discussed opportunities to improve system performance. This type of engagement demonstrates the ongoing consumer protection value of TA and highlights the role of SOMAH as a trusted technical resource beyond project completion.

Contractor bidding assistance was also a notable area of support (13.5%). One nonprofit property owner required assistance identifying new contractors for five active projects after the organization previously supporting project development was suddenly no longer able to continue. Through TA support, the property owner was able to navigate the contractor selection process, solicit new project proposals, and select a new contractor to get the projects back on track.

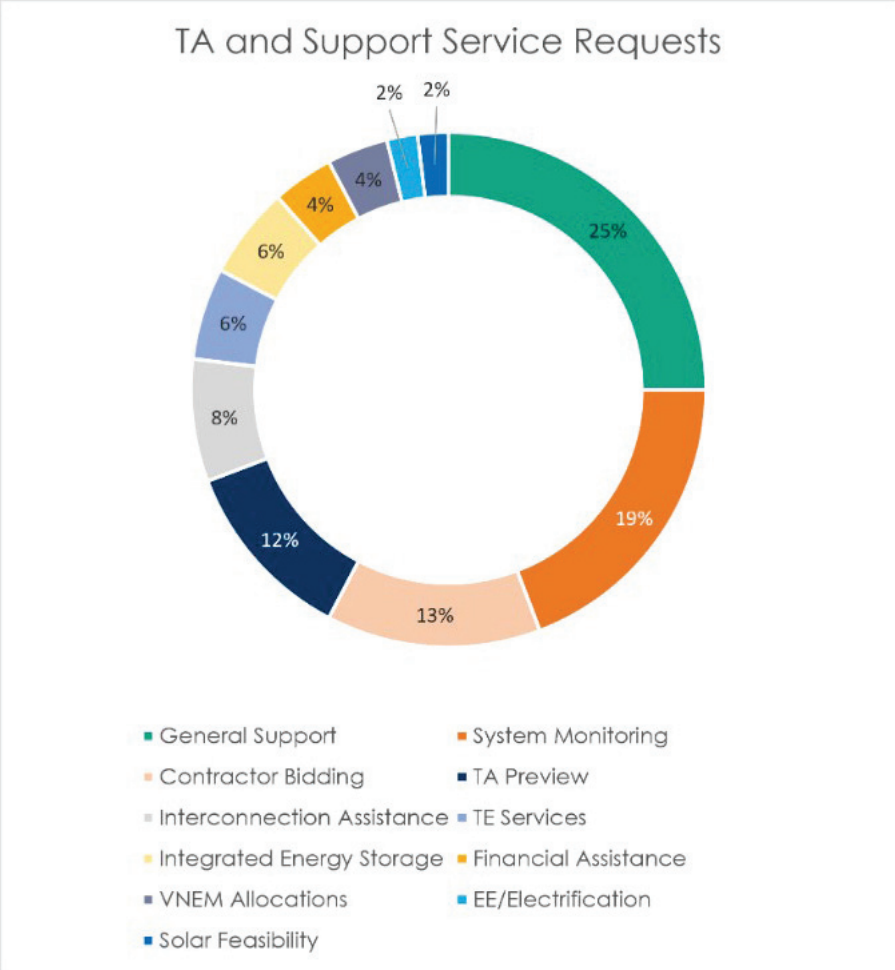
TA Preview Reports continued to serve as an important project development tool for prospective participants. During the reporting period, the SOMAH PA prepared 22 customized TA Preview Reports. These reports help property owners evaluate project viability and determine whether SOMAH participation is an appropriate fit for their property. Several TA Preview Reports prepared during the reporting period resulted in three projects advancing toward program enrollment. One project received approval to participate in Upfront TA and is preparing to solicit contractor bids, one project submitted a Track A application and is working to finalize application documentation,

and one project submitted a Track B application that is nearing incentive reservation and includes integrated energy storage.

As SOMAH expands access to integrated energy storage, participants increasingly sought assistance understanding storage eligibility requirements and project development considerations. During the reporting period, two contractors that had not previously submitted applications in SOMAH sought support related to energy storage project development and application preparation. With TA support, these contractors submitted a combined eight SOMAH applications, all of which included integrated energy storage. This outcome demonstrates how TA can help reduce participation barriers, support new market entrants, and expand access to program benefits.

As the SOMAH pipeline continues to grow, the nature of TA requests continues to evolve. Earlier requests were often focused on solar feasibility and project eligibility, while recent requests increasingly relate to system performance, contractor selection, interconnection challenges, and integrated energy storage. Understanding these trends allows SOMAH to refine available resources and continue providing support that helps projects progress from initial consideration through long-term system operation.

Figure 47 - TA Service Types Requested in Q1-Q2 2026



3.5.2 Upfront Technical Assistance

Upfront Technical Assistance (Upfront TA) provides property owners with objective, no-cost technical expertise and project development support before submitting a Reservation Request Package. Through solar feasibility assessments, financial analysis, contractor procurement support, and referrals to complementary energy efficiency programs, Upfront TA helps property owners determine whether solar is an appropriate fit for their property and provides the resources needed to advance viable projects forward.

Since the program was launched, 53 projects have received Upfront TA services. Of these projects, 22 remain actively engaged in Upfront TA, 16 have advanced to later milestones within the SOMAH application process, and 15 elected not to move forward after receiving Upfront TA. These outcomes reflect an important objective of Upfront TA: providing property owners with the information necessary to evaluate project feasibility

and determine whether solar is the right investment for their property. Common reasons for discontinuing participation include site constraints, project economics, and timing considerations. By identifying these barriers early, Upfront TA helps property owners avoid pursuing projects that may not provide meaningful benefits to residents or their operations.

The 34 projects currently participating in or advanced beyond Upfront TA represent approximately 3.9 MW of estimated solar PV capacity, 6.1 GWh of projected annual energy generation, and more than $10.7 million in potential SOMAH incentives. These numbers are reflected in Figure 48. These projects represent 25 different affordable housing organizations throughout California. Beyond the anticipated solar generation and incentive value, these projects are expected to deliver meaningful utility bill savings to residents. More than 80% of the projected solar production will be allocated directly to over 1,700 low-income households through VNEM bill credits, offsetting more than 88% of participating households' electricity consumption and advancing SOMAH's goal of delivering tangible economic benefits to affordable housing residents.

Figure 48 – Upfront TA Summary

IOU	Number of Active Track A Projects	Estimated SOMAH Incentive	Estimated System Size (CEC-AC kW)	Expected Aggregated Annual Output (kWh)
PG&E	27	$7,959,883	2,954	4,402,634
SCE	5	$2,521,195	922	1,532,900
SDG&E	2	$290,161	100	197,486
Liberty Utilities	0	$0	0	0
PacifiCorp	0	$0	0	0
Total	34	$10,771,239	3,976	6,133,020

Projects that advanced beyond Upfront TA continue to demonstrate the value of the relationships and project-specific knowledge developed during the Upfront TA process. Several projects involve property owners and solar contractors participating in SOMAH for the first time and require ongoing coordination as they navigate program requirements, project milestones, contractor procurement activities, and utility processes. The relationships developed during Upfront TA allow participants to continue relying on their Energy Project Manager as a trusted point of contact who understands

both the project and the program requirements, helping align SOMAH milestones with the often-complex realities of multifamily solar project development.

The 22 projects actively receiving Upfront TA illustrate the complex challenges facing affordable housing solar projects. During the reporting period, technical assistance activities included supporting projects undergoing major electrical service upgrades to ensure solar opportunities remained incorporated into broader building improvement plans and identifying solar-related infrastructure needs that could be addressed concurrently with planned electrical work. Other projects required detailed evaluations of innovative solar and energy storage configurations intended to provide backup power for community spaces, including analysis of different system architectures and operational approaches to balance resiliency goals and resident and owner benefits.

Upfront TA also played an important role in helping property owners navigate financial and procurement challenges. During the reporting period, one property owner selected a contractor new to the SOMAH Program based on a creative project delivery approach that reduced upfront financial barriers by aligning project cash flow with SOMAH incentive payments. The same contractor subsequently became involved with another Upfront TA project facing significant roof repair needs, creating an opportunity to coordinate roofing and solar improvements and preserve future solar development opportunities. These examples demonstrate how Upfront TA can help property owners identify practical solutions to project development barriers that have historically limited solar adoption for affordable housing properties.

Furthermore, Upfront TA continues to serve as a pathway for connecting property owners with broader building decarbonization opportunities. Of the 38 projects currently participating in or advanced beyond Upfront TA, 24 projects (63.2%) are pursuing energy efficiency and electrification improvements in conjunction with solar PV projects. Twenty of these projects were referred to energy efficiency programs through SOMAH. Properties participating in these programs are pursuing deep electrification measures, including heat pump water heating, heat pump HVAC systems and other upgrades. These measures can further reduce residents' energy costs, and lower owners' operation and maintenance costs, improve building performance, and enhance resident health and safety.

As program participant needs continue to evolve, Upfront TA remains a critical tool for reducing participation barriers, supporting informed project decisions, and helping affordable housing providers navigate increasingly complex project development challenges. By providing objective expertise, individualized support, and connections to complementary resources, Upfront TA helps property owners identify and pursue clean energy investments that best meet the needs of their properties and residents.

3.5.3 Fleet Monitoring

Fleet monitoring extends SOMAH's Technical Assistance by supporting projects after installation and helping ensure completed solar PV systems continue operating as expected and deliver the expected financial benefits to property owners and low-income tenants. Using the SunSpot monitoring platform, the SOMAH PA reviews completed system performance each month, identifies systems that may require additional investigation, and works with property owners and solar contractors to investigate, understand, and address potential performance issues. This proactive approach complements standard operations and maintenance activities while helping maximize long-term system production.

As of June 30, 2026, 420 of the 441 completed SOMAH PV systems (95%) were connected to and monitored through SunSpot. The monitored fleet represents more than 58.3 MW CEC-AC of installed capacity and has generated over 153.9 million kWh since installation. During the reporting period, completed systems produced 34.9 GWh of electricity and operated at approximately 87% of expected production, representing continued improvement compared to previous reporting periods. Through ongoing monitoring and engagement with project stakeholders, SOMAH remains committed to maximizing system performance, recognizing that increased solar production directly translates into greater utility bill savings for affordable housing residents.

Fleet monitoring has evolved beyond identifying underperforming systems and now serves as a valuable tool for understanding long-term system performance across the growing SOMAH portfolio. When production irregularities are identified, the SOMAH PA works directly with property owners and solar contractors to investigate potential causes, confirm monitoring connectivity, discuss equipment or operational issues identified during contractor site visits, and document corrective actions. These ongoing collaborations not only help individual projects restore expected performance but also enable the PA to identify recurring trends across completed systems. As the SOMAH portfolio expands, fleet monitoring also provides the PA with a unique opportunity to identify trends across hundreds of systems that can inform future technical assistance activities, improve post-installation resources, enhance participant education, and identify opportunities for future program improvements.

Fleet monitoring continues to identify recurring production reporting issues that warrant additional investigation. One example involves projects utilizing a common inverter manufacturer, where certain metering configurations can result in production being underreported or, in some cases, overreported on the inverter's monitoring platform and subsequently within SunSpot. Through ongoing analysis and communication with installing contractors, the SOMAH PA has determined that these discrepancies are generally associated with inverter metering configurations rather than issues with the

project's NGOM (net generation output meter). While corrective actions, including inverter meter replacements, have improved reporting alignment for some projects; similar issues continue to be observed across portions of the fleet. This work demonstrates how fleet-level monitoring can identify trends affecting multiple projects that may not be apparent when reviewing individual systems in isolation.

As the number of completed SOMAH projects continues to grow, fleet monitoring remains an important component of the program's long-term success. By combining ongoing performance analytics with proactive engagement and technical expertise, the SOMAH PA helps maximize system production, improve long-term reliability, and ensure completed SOMAH projects continue delivering expected clean energy and financial benefits to the low-income residents the program was designed to serve.

https://calsomah.org/resources/somahs-technical-assistance-and-support-servicesFleet monitoring data for Q1-Q2 2026 is summarized as:

- 420 systems monitored
- 58.4 MW of capacity
- 34.93 GWh of production
- Percentage between production and estimate 87%
- Approximate emissions avoided: 16,470 tons of CO_2 (based on MW capacity using EPA AVERT tool)

Figure 49 – Estimated Versus Actual System Performance

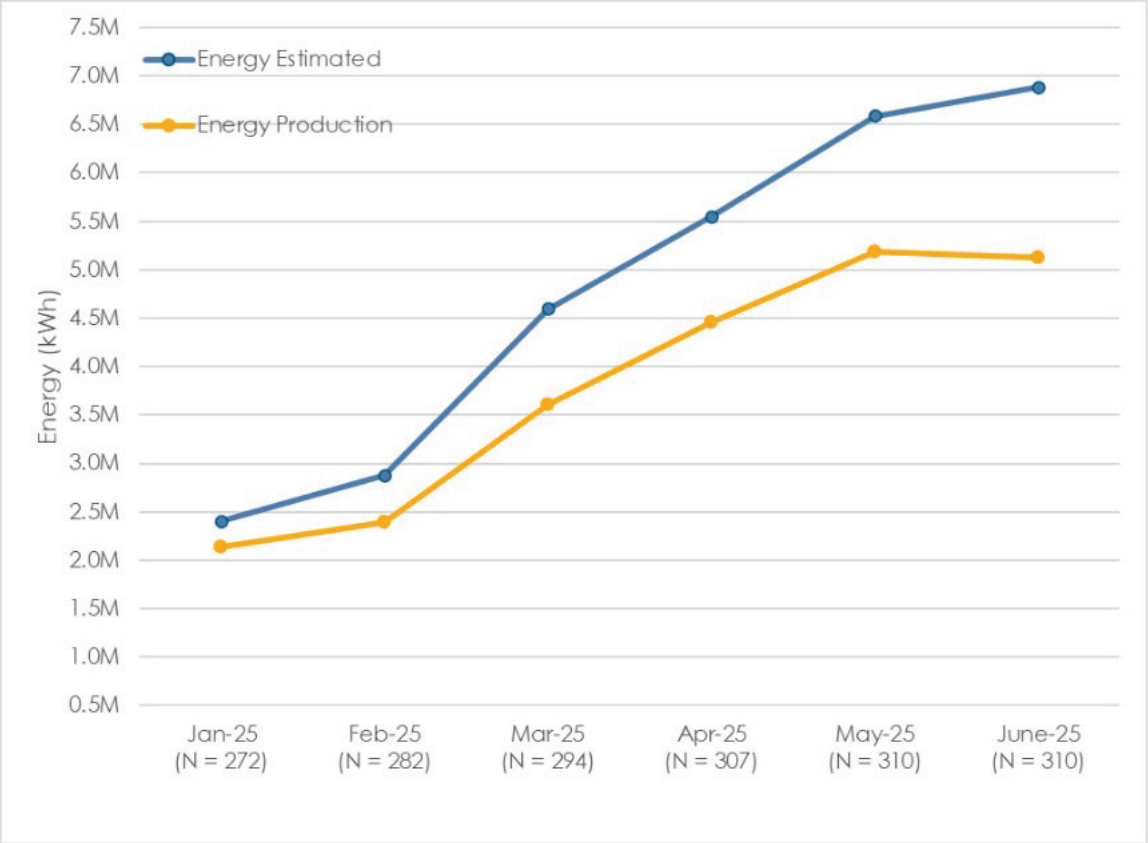


Figure 50 – Completed SOMAH Systems Being Monitored

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 transparently. The SOMAH PA works in close partnership with the program's Advisory Council 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 following information 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) an overview of evaluation efforts; and 3) program design 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 an advisory body, public forums, and monthly working meetings with the participating SOMAH IOUs.

4.1.1 Public Forums

SOMAH public forums are held as needed 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.

No public forums were held during this reporting period due to a lack of substantial program updates. The next public forum is anticipated to take place during Q3-Q4 2026.

4.1.2 IOU Working Group

During the reporting period, the SOMAH PA held six IOU Working Group meetings. The Q1-Q2 2026 working group meetings focused on the following topics:

- January 2026 – General program and marketing coordination updates, tenant education hotline project updates, Long Term IOU Budget Forecasting, Quarterly Bill Credit Memo Report, High Priority Properties List.
- February 2026 – General program and marketing coordination updates, tenant education hotline project updates, Long Term IOU Budget Forecasting, Quarterly Bill Credit Memo Report, High Priority Properties List.
- March 2026 – General program and marketing coordination updates, tenant education hotline project updates, Long Term IOU Budget Forecasting, Quarterly Bill Credit Memo Report, High Priority Properties List.

- April 2026 – General program and marketing coordination updates, Long Term IOU Budget Forecasting, Quarterly Bill Credit Memo Report, High Priority Properties List, Collections, SB 355.
- May 2026 – General program and marketing coordination updates, Long Term IOU Budget Forecasting, Quarterly Bill Credit Memo Report, High Priority Properties List, Pending IOU Queue.
- June 2026 – General program and marketing coordination updates, Long Term IOU Budget Forecasting, Quarterly Bill Credit Memo Report, High Priority Properties List.

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

4.1.3 SOMAH Advisory Groups

SOMAH currently has one advisory group, the SOMAH Advisory Council. This group helps the program remain accountable to the communities it was designed to serve.

Advisory Council

The SOMAH Advisory Council (SOMAH AC) has two main purposes: 1) to ensure the voices and interests of equity-focused community advocates and key stakeholders remain at the center of the SOMAH Program; and 2) to make certain SOMAH maximizes benefits to low-income tenants and DACs by advising the SOMAH PA on program development and implementation. Presently, the SOMAH AC is composed of 12 members representing the fields of environmental justice, workforce development/labor, tenant rights and economic justice, affordable housing, tribal communities, and the solar industry. The third SOMAH AC cohort ended in December 2025, and the fourth cohort launched in spring 2026.

The SOMAH AC meets virtually on a quarterly basis. During this reporting period, one meeting was held in May.

Q2 2026 SOMAH AC meeting topics included:

- Discussion of program incentive levels and integrated storage
- General program update
- Election of this cohort's chair and vice chair
- Walkthrough of the 2026 MEO Plan and MEO strategies for 2027

The SOMAH AC will meet again in Q3 and Q4 of 2026.

4.1.4 Third-Party Program Evaluation

As directed by D.17-12-022, the CPUC Energy Division (ED) provides regular evaluations of the SOMAH Program to the state 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[23] maintains records of all files relating to the SOMAH evaluation reports.

The 2026 Triennial SOMAH Evaluation Report, also conducted by Verdant Associates, was released in April 2026. At the close of this reporting period the process for the SOMAH PA and the IOUs to respond to the recommendations made by the 2026 Triennial SOMAH Evaluation Report is underway and set to conclude in Q3 2026. The next report is slated for 2029.

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. 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 higher incentive rates.

As mentioned in Section 2, the program was further modified by California Senate Bill 355 (SB 355), signed October 7, 2023. SB 355 extends the program through 2032 and includes several modifications to expand program eligibility. Some of these modifications were implemented in Q1 2024 via Handbook 8. The list of modifications made via Handbook 8 is in Section 4.2.2.

At the close of this reporting period the remainder of program changes directed in SB 355, but not included in the current handbook, such as integration of new construction and master-meter project eligibility, still required further direction from the CPUC before additional modifications could be made to the program. D.24-11-006 (further outlined in Section 4.2.1.) noted that specific elements of SB 355 required further consideration to determine appropriate implementation, which the CPUC continues to address in the successor proceeding, R.25-01-005. D.24-11-006 also acknowledged comments urging

[23] https://www.cpuc.ca.gov/somah

the CPUC to prioritize implementation of the remaining directives from SB 355. As a result, a related comment period was opened in June 2025 requesting stakeholder feedback on the remaining prioritized directives from SB 355, including possible eligibility for new construction properties and master-metered properties. As of the end of this reporting period, a related Proposed Decision was released by the CPUC. The comment and reply comment periods concluded, the CPUC voted on July 2, 2026, and a final decision was issued on July 13, 2026 that will not include new construction or master metered properties as eligible for SOMAH, which will be reported on in the next SAPR.

4.2.1 Decision 24-11-006

A Proposed Decision was released on September 30, 2024, as an outcome of the May 5, 2023, Ruling in R.14-07-002, *Administrative Law Judge's Ruling Inviting Comments on Potential Modifications to Solar on Multifamily Affordable Housing Program*. It included modifications to refine and streamline SOMAH to drive participation and improve delivery of the program's benefits, in lieu of higher solar incentives. The Final Decision, D.24-11-006, was approved and issued on November 14, 2024. Through D.24-11-006, the CPUC has directed the SOMAH PA to include additional goals, metrics, and KPIs in future Semiannual Progress Reports and forthcoming evaluations.

The Decision also includes an emphasis on supporting and increasing participation of DAC projects, which aligns with the formal adoption of additional program goals through D.24-11-006, requiring at least 40% of all projects statewide to be in DACs and at least 30% of all projects in each large IOU territory to be in DACs by the program's end. Decision requirements also specify that the SOMAH PA allocate 1.5% of the forecasted 2025 ME&O budget toward expenditures for ME&O efforts in Liberty and PacifiCorp territories. Based on the 2026 ME&O Plan Budget Forecast, that equates to roughly $27,000.

The Decision also includes several directives focused on project costs and incentives:

- Integrated or paired energy storage incentives.
- Expansion of installation-related costs as eligible project costs for the program.
- Immediate suspension of the Expected Performance Based Buydown (EPBB) Calculator for future and active applications in Liberty and PacifiCorp territories, tribal applications in the PG&E territory, and PG&E projects located at or above one minute south of the 39th parallel.
- Progress Payment Pathway as the default with an option to opt out.
- Early payment option for tribal projects.

Additional directives focused on program design and outreach include:

- Removal of the tenant education requirement for contractors and property owners.
- High-priority properties analysis and outreach effort with the IOUs.
- Removal of the requirement for Track A projects to obtain/provide proof of three bids.
- Modified job training requirements for Liberty and PacifiCorp projects.

In addition to the directives mentioned above, the Decision also included IOU-focused directives:

- SCE, SDG&E, and PG&E must dedicate the equivalent of one full-time employee's time to completing SOMAH interconnections and providing support for SOMAH property owners and tenants in cases of VNEM billing delays.
- Each IOU will provide a confidential quarterly memo to the PA and Energy Division about VNEM billing status for SOMAH projects that have received PTO with narrative process changes or identified challenges starting January 30, 2025.
- Each IOU must also submit a Tier 1 Primary Data Collection Advice Letter providing a timeline for fulfilling data requests in support of the triennial evaluation to be completed in 2026.

By the end of this reporting period, the SOMAH PA had implemented all directives in D.24-11-006 and begun drafting an Advice Letter to replace the current EPBB calculation method. Further details on the direction for storage integration with SOMAH and the process for early payments for tribal projects were submitted to the CPUC via the Handbook Advice Letter, CSE Advice Letter 164-E, and its Supplement, CSE Advice Letter 164-E-A. The Advice Letters were approved on July 1, 2025, and effective as of May 11, 2025. The resulting Handbook 9 was published on July 30, 2025.

The SOMAH PA is confident these measures will increase participation and support for Liberty and PacifiCorp projects and offer greater support for contractors. CBO guidelines and tracking measures may shift to support current and future program needs as CBOs are encouraged to provide the bulk of the tenant education support while continuing outreach to property owners as overall programmatic capacity changes.

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 51 provides a non-exhaustive overview of the SOMAH Program Handbook since the inaugural edition, including major updates by version.

Figure 51 – Handbook Versions

Version	Major Updates	Approval Date
Handbook 1 (original)	• Established original program offerings and requirements	March 2019
Handbook 2	• SOMAH & MASH stacking	May 2020
Handbook 3	• Progress payments	December 2020
Handbook 4	• Application pipeline management (lottery) • Required notification for early job trainee termination • System changes affecting incentive amounts • Assorted minor updates	May 2021
Handbook 5	• 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	• Split Reservation Request Milestone into two phases to streamline the application process • Removal of Multifamily Affordable Housing Document Cover Sheet • Removal of 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 • Option for SOMAH PA to perform remote site inspections at Incentive Claim	February 2023
Handbook 7	• Elimination of the annual incentive step-down • Increased incentive levels	June 2023

Handbook 8	• Extended the SOMAH Program through 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 • Updated the term "building" to "property" in the definition of "Qualified multifamily affordable housing property"	February 2024
Handbook 9	• Expansion of installation-related costs as eligible project costs for the program • Updates to Expected Performance Based Buydown (EPBB) Calculator: immediate suspension and pathway for future change • Integrated or paired storage incentives from SOMAH • Progress Payment Pathway as the default: remaining option to opt out • Early payments for tribal projects • Removal of tenant education requirements • Increased participation and support for Liberty and PacifiCorp projects • Directives for IOUs: each large IOU must dedicate the equivalent of one full-time employee's time to VNEM and interconnection support	July 2025

The SOMAH PA is committed to continually improving program planning and development while balancing stakeholder engagement in the development of proposed updates with the need to reduce program complexity wherever possible. With those guiding principles, the SOMAH PA works closely with stakeholders to address program gaps and ensure the program is implemented in ways that provide meaningful economic benefits to participating tenants and properties, particularly in the state's environmental justice communities.

5. Conclusions

With significant program changes, such as the removal of the EPBB for projects in northern parts of the state, and ongoing efforts to reduce program barriers and increase participation, the SOMAH PA remains committed to supporting applicants and property owners. The SOMAH PA also continues to expand its services to meet participant needs, as evidenced by the uptake of projects claiming incentivized integrated storage, the Progress Payment Pathway becoming the default pathway for applicants, and the extensive use of the Affordability Prescreen and Technical Assistance and Support Services. Program directives from D.24-11-006 play an important role in increasing participation and positioning the program for continued success through greater transparency and streamlined processes. The program continues to prioritize installations in DACs and tribal communities, aiming to increase program awareness and project participation among both groups. The SOMAH PA is especially focused on broader tribal engagement to remove any barriers to participation and increase the number of tribal applications.

SOMAH's annual Marketing, Education, and Outreach (ME&O) Plan guides the program's overarching outreach and marketing strategies for key audiences. Outreach efforts for 2026 are shaped by D.24-11-006, the 2023 Triennial SOMAH Evaluation Report, previous SOMAH-led primary research, and input from advisory groups. The 2026 ME&O Plan focuses on conducting property owner outreach, increasing contractor and subcontractor diversity, working closely with CBOs, sharing updated tenant education materials, and collaborating with energy efficiency partners and SOMAH IOUs. The plan also focuses on connecting with and supporting property owners and contractors, with an emphasis on program updates and integrated storage. Recommendations from the 2026 Triennial SOMAH Evaluation Report will begin to be implemented in the next reporting period and will inform changes to the 2027 ME&O Plan.

In the first half of 2026, the SOMAH PA continued to see strong project volume, with consistently high numbers of installation completions and progress payments. As projected, the SOMAH Program saw increasing numbers of new project entries in Q1-Q2 2026 because of program changes directed by D.24-11-006, such as the integrated storage incentive. The SOMAH PA also continues to build on the removal of the EPBB for northern projects and the Early Payment Pathway for tribal properties as expanded avenues for new projects. The SOMAH PA anticipates impactful progress toward the program's 300 MW goal in the second half of 2026 as sunset of the ITC encourages projects to reach completion.

To ensure the program continues to deliver renewable energy and financial benefits to tenants and support equity through a dynamic and adaptive approach, the SOMAH PA continues to conduct evaluations and solicit feedback and input from CBOs, participants, stakeholders, the SOMAH Advisory Council, and other 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 walkthrough. 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.