Contractor Eligibility Training
Presenters

Rachael Diaz – Outreach Coordinator, SOMAH PA

Rosie Jeffrey – Outreach Coordinator, SOMAH PA

Karinna Gonzalez – Outreach Coordinator, SOMAH PA

Laura Wong – Project Associate, SOMAH PA
Panelists

Lauren Friedman, SOMAH PA
Sarah Hill, SOMAH PA
Stephanie Wang, SOMAH PA
Sarah Salem, SOMAH PA
Agenda

- Program Overview
- Program Eligibility
- Application Overview
- PowerClerk Application Portal
- Online Bidding Tool
- Worksite Safety
- Services Provided by the SOMAH PA
- Wrap-up
Webinar Expectations

- Webinar length may be shorter than 3 hours
- Live polls throughout the training
- Two Q&A portions:
  - Application process Q&A
  - General Q&A
Submitting Questions

Questions

Webinar staff to everyone 1:34 PM

Q: Will this session be recorded?
A: Yes, I will post the recording to the shared workspace.
Training Objectives

▪ Provide participants with a high-level overview of the SOMAH application process
▪ Provide participants with the resources to gain more information on specific program requirements
▪ Provide participants with the necessary next steps in order to become an Eligible SOMAH Contractor and what to expect post-training
Live Poll
Program Overview
Program Rollout Timeline

October 8, 2015
Assembly Bill 693 signed into law by Governor Jerry Brown

December 14, 2017
CPUC issued Decision D.17-12-022 creating the SOMAH program

July 12, 2018
SOMAH Program Handbook Public Workshop held to solicit feedback on the draft handbook

July 26, 2018
Deadline for submitting written comments on the draft SOMAH Program Handbook

October 1, 2018
SOMAH Program Handbook & Program Implementation Plan submitted to CPUC

April 2, 2019
Resolution approved

Q2 2019
Program Launch
SOMAH Program Goals

- Provide clean power and energy cost savings to California multifamily affordable housing residents
- Promote economic development in disadvantaged communities
- Provide maximum direct benefits to tenants
- Develop a larger pool of contractors and a competitive bidding process
Total SOMAH Program Budget

- Up to $100 Million annual budget allocated by Investor Owned Utilities (IOU) from shared greenhouse gas auction proceeds

- The incentive amounts are specifically capped by each IOU territory based on that IOU's auction proceeds

- Projects may only receive incentives from the IOU in which the project is located
Incentive Rates

Incentive rates vary based on:
- Capacity of the installed system
- Energy percentage split between tenant and common area
- Other funding
  - Federal Investment Tax Credit (ITC)
  - Low-income Housing Tax Credits (LIHTC)

<table>
<thead>
<tr>
<th>Tax Credits</th>
<th>$ per AC Watt Incentive</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITC</td>
<td>LIHTC</td>
</tr>
<tr>
<td>No</td>
<td>No</td>
</tr>
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<td>No</td>
</tr>
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<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Incentive Calculation

- The SOMAH program will pay incentives for projects through an up-front incentive referred to as an Expected Performance Based Buydown (EPBB)
- EPBB incentives are based on the system's capacity and design, which provide an estimate of the system's future performance

**EPBB Incentive Payment = Reserved Incentive Rate x System Rating\textsuperscript{22} x Design Factor**
Property Eligibility

- At least five units
- Deed-restricted with at least 10 years remaining on the property's affordability restrictions
- Separately metered units
- Existing building or retrofit
Property Eligibility continued

- Satisfy one of the following:
  - 80% of property residents have incomes at or below 60 percent of the area median income (AMI)
  - Property is in a defined disadvantaged community (DAC) that scores in the top 25 percent of census tracts statewide in the CalEnviroScreen version 3
  - Be a utility or Community Choice Aggregator (CCA) customer in the participating utility service territories
Participating Investor Owned Utilities

- PacifiCorp
- Pacific Gas & Electric
- Liberty Utilities
- Southern California Edison
- San Diego Gas & Electric
Ineligible Properties

- Properties that have received a final interconnection authorization letter dated more than 12 months before submitting a SOMAH Reservation Request
- New construction developments
- Master-metered or sub-metered buildings
- Located in municipal utility territories
Properties that participate in HUD programs & rely on a Public Housing Authority (PHA) standard schedule of utility allowances are **eligible** to participate in SOMAH
- Example: Properties with Section 8 tenant-based vouchers.

Properties that participate in HUD programs covered by HUD memo H-2015-04 are currently **not eligible** to participate in SOMAH
- Example: Properties with Section 8 project-based assistance.
CERTAIN HUD PROPERTIES ARE NOT ELIGIBLE AT THIS TIME
Property owner must attest at the time of reservation that the property does NOT have ANY of the following types of HUD funding:

A. Project Based Section-8
- New Construction
- State Agency Financed
- Substantial Rehabilitation
- Section 202/8
- Rural Housing Services Section 515/8
- Loan Management Set-Aside
- Property Disposition Set-Aside

B. Rent Supplement (Section 101)
C. Project Assistance Contract (Section 202/162)
D. Project Rental Assistance Contract (Section 202)
E. Senior Preservation Rental Assistance Contracts (Section 202)
F. Project Rental Assistance (Section 811)
H. Rental Assistance Payments (Section 236)
I. Below Market Interest Rate (Section 221(d)(3))
Section 8/HUD Housing

USDA PROPERTIES MUST SUBMIT LETTER

- Properties with USDA financing must provide a letter from USDA acknowledging that the property will be permitted to exclude SOMAH solar credits from utility allowance calculations to comply with SOMAH tenant benefit requirements.
Direct Tenant Benefits

- At least 51% of system's electric output must directly offset tenant load

- Bill credits will be issued to participating tenants through the SOMAH-specific Virtual Net Energy Metering tariffs
Program Participants

- **Applicant**: The entity that submits the SOMAH application

- **Host Customer**: The owner of, or persons/entity responsible for, the property where the PV system will be located

- **System Owner**: The owner of the PV system at the time the incentive is paid

- **Eligible SOMAH Contractor**: A solar installer who serves as the authorized representative for their company, has a valid CSLB license number and has completed this workshop
Live Poll
Application Overview
Application Participation Tracks

**Track A**: Upfront Technical Assistance Selected

- Upfront Technical Assistance
- Reservation Request
- Energy Efficiency Milestone
- Proof of Project Milestone
- Incentive Claim
- Inspection
- Payment

**Track B**: Upfront Technical Assistance **NOT** selected

- Reservation Request
- Energy Efficiency Milestone
- Proof of Project Milestone
- Incentive Claim
- Inspection
- Payment
SOMAH Project Timeline

Start Track A
Upfront Tech. Assistance
(Up to 3 months)

Start Track B
Reservation Request (RR)

Submit Energy Efficiency Compliance Milestone
(within 60 days*)

Submit Proof of Project Milestone
(within 240 days*)

Submit Incentive Claim Package
(within 18 months*)

Complete PV Installation and Utility Interconnection

*period begins upon the approval of RR, not submittal date
There are two options to receive Technical assistance:

- **Upfront Technical Assistance (Track A)** is for property owners who are trying to understand the solar potential for their site, and the associated costs and benefits of moving forward with a SOMAH project.

- **Standard Technical Assistance (Track A & B)** is for property owners and contractors who need assistance with energy efficiency, general project management and construction support, and project financing.
Upfront Technical Assistance (Track A)

- Track A participants will be assigned a designated Energy Project Manager (EPM) who will serve as the single point of contact for technical assistance services.

- Upfront TA services are related to:
  - Solar feasibility (sizing and saving potential analysis)
  - Financing
  - Coordination with non-SOMAH energy programs and upgrades
  - Establishing common vs. tenant system size split
Standard Technical Assistance (Track A & Track B)

- Standard Technical Assistance (TA) is available to all eligible projects once the Reservation Request Package has been approved.

- Standard TA services may include:
  - Energy efficiency and clean energy technical assistance
  - Project management and post-application technical assistance
  - Financial technical assistance
Upfront Technical Assistance Request

DOCUMENTS

- Documentation of Multifamily Low-Income Housing Eligibility
- Cover Sheet for Multifamily Low-Income Housing Documentation
- Letter of Authorization to Receive Customer information or Act on a Customer's Behalf
Upfront Technical Assistance Request

- **Submit**
- **Review**
- **Pending IOU Data**
- **Resubmitted**
- **Approve**
- **Suspended**

20 days for corrections

Funding is earmarked for 3 months or until the Reservation Request Package is submitted, whichever is first.
Technical Assistance Summary

Two options to receive Technical Assistance:

- **Upfront Technical Assistance** to assess the solar feasibility of a property and;

- **Standard Technical Assistance** to assist with project management and financing
Live Poll
Reservation Request Package
Reservation Request Package

- Applicants must submit the Reservation Request Package and the Application Deposit in order to hold the reservation.

- Once all the required documentation is submitted, the SOMAH PA will review the request and send an approval notice to the applicant and host customer.

Table 8: Application Deposits

<table>
<thead>
<tr>
<th>kW ≥</th>
<th>kW &lt;</th>
<th>Deposit</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>50</td>
<td>$1,250</td>
</tr>
<tr>
<td>50</td>
<td>100</td>
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<td>100</td>
<td>250</td>
<td>$5,000</td>
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<tr>
<td>250</td>
<td>500</td>
<td>$10,000</td>
</tr>
<tr>
<td>500</td>
<td>1,000</td>
<td>$20,000</td>
</tr>
</tbody>
</table>
Reservation Request Package

DOCUMENTS
- Completed Reservation Request Form
- List of tenant addresses on property
- Affidavit Ensuring 100 Percent Tenant Economic Benefit
- Application Deposit (if system size is ≥ 10 kW)
- Documentation of VNEM Load Allocation
- Multiple Bids or Multiple Bid Waiver (Track B only)
Reservation Request Package

**DOCUMENTS (Track B only)**

- Documentation of Multifamily Low-Income Housing Eligibility
- Cover Sheet for Multifamily Low-Income Housing Documentation
- Letter of Authorization to Receive Customer Information or Act on a Customer’s Behalf
MULTIPLE BID REQUIREMENT

- Track A - Multiple bids are required

- Track B – Multiple Bid Waiver may be submitted if requirement is not met

- Contractors are required to submit the project bid template to customers for each bid
CONTRACTOR INFORMATION & PROPERTY INFORMATION

- Contact Information
- Contractor Information
- Property Information
CONTRACT INFORMATION

- Ownership type
- Warranty Information
- Performance Guarantee
SYSTEM SPECIFICATION & INSTALLATION INFORMATION

- Calculations of system specifications (using EPBB calculator)
- Milestones & estimated completion date
- Scope of work with inclusions and exclusions
- Proposed equipment

### Section IV - System Specifications & Installation Information

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
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<tbody>
<tr>
<td>Tenant area annual consumption (watts per sq. ft.)</td>
<td>kWh</td>
</tr>
<tr>
<td>Common area annual consumption (watts per sq. ft.)</td>
<td>kWh</td>
</tr>
<tr>
<td>Total annual consumption (watts per sq. ft.)</td>
<td>kWh</td>
</tr>
<tr>
<td>Estimated Production</td>
<td>kWh</td>
</tr>
<tr>
<td>Estimated annual system production (kW/year)</td>
<td>%</td>
</tr>
<tr>
<td>Estimated amount of annual consumption offset by PV system</td>
<td>%</td>
</tr>
<tr>
<td>Proposed Common Area allocation (maximum 45% of total system)</td>
<td>%</td>
</tr>
<tr>
<td>Proposed Tenant Area allocation (minimum 5% of total system)</td>
<td>%</td>
</tr>
</tbody>
</table>

Estimated project timeline:

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Estimated Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signed Contract</td>
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</tr>
<tr>
<td>Permit Filed</td>
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<tr>
<td>Construction Start Date</td>
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</tr>
<tr>
<td>Construction End Date</td>
<td></td>
</tr>
<tr>
<td>PTO received</td>
<td></td>
</tr>
<tr>
<td>Incentive payment received</td>
<td></td>
</tr>
</tbody>
</table>

**Scope of Work - Inclusion and Exclusions**

- Tree and other landscape trimming, removal as needed □ Yes □ No
- Asphalt or ground removal for ground mount or carport installation □ Yes □ No
- Electrical service upgrades on customer side if required □ Yes □ No
- Utility de/re-energize fees if applicable □ Yes □ No
- Fencing and exclusion zones around work and storage areas to maintain safety □ Yes □ No
ADDITIONAL INFORMATION, PAYMENTS & COST INFORMATION

- Prior experience
- Attached supporting documents
- Payment and cost breakdown
- Payment schedule
- Rebate designation
- Third-party owner 20-year table for rates (if applicable)
Project Bid Template – Section VII & Acknowledgments

**JOB TRAINING AND LOCAL HIRING**

- Local hiring plan (if applicable)
- Wage & benefit information
- Acknowledgements & signatures
Reservation Request Package

SYSTEM EQUIPMENT ELIGIBILITY

- Equipment must be new, not pilot or demonstration systems, and on the CEC list of eligible equipment

- For a replacement system to be eligible, it must have been in service for 20 years and currently outside of the warranty contract
Reservation Request Package

PERMANENCY REQUIREMENTS

- Only permanently installed systems are eligible for SOMAH incentives
- Equipment must be secured to a permanent surface
Reservation Request Package

1. **Submit**
   - **Review**
     - 20 days for corrections
     - Suspended

   - **Pending IOU Data**

   - **Pending Application Deposit**

   - **Approved**
     - Reservation Approval
     - Reservation funding is reserved for 18 months.

30 days to submit application deposit after Reservation Request is submitted.
Reservation Request Package Summary

- Application deposits
- Multiple Bid Requirement
- Bidding Template
- System Equipment Eligibility
- Permanency Requirements
Live Poll
Energy Efficiency Compliance Milestone

Upfront Technical Assistance → Reservation Request → Energy Efficiency Milestone → Proof of Project Milestone → Incentive Claim → Inspection → Payment
Energy Efficiency Compliance Milestone

**DOCUMENTS**

- Documentation of an onsite walkthrough Energy Efficiency Audit ASHRAE Level 1 or higher (Pathway 1);

  **OR**

- Proof of enrollment in a utility, REN, CCA, or federally provided whole-building multifamily energy efficiency program (Pathway 2);

  **AND**

- Solar sizing tool
Energy Efficiency Compliance
Milestone: Pathway 1

Hire a credentialed energy auditor to provide a whole-building energy efficiency walkthrough audit

- Energy Auditor Database: The SOMAH PA is building out an energy auditor database that will be used as a resource. Energy Auditors must have one of the following credentials:
  - BPI Multifamily Building Analyst (MFBA)
  - California HERS Whole House Rater
  - RESNET Rater
  - GreenPoint Rater, Existing Home Multifamily
  - AEE Certified Energy Manager
  - American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) (BCxP, BEAP, BEMP or HBDP)
  - Professional Engineer
Energy Efficiency Compliance
Milestone: Pathway 2

Recent or active participation in any of the following:

- Approved whole-building energy upgrade program
- Documentation of a recent California Tax Credit Allocation Committee (TCAC) rehabilitation
- Documentation that the property was completely constructed under a recent version of Title 24
Energy Efficiency Compliance
Milestone: Solar Sizing Tool

- The Solar Sizing Tool is designed to ensure that PV systems are appropriately sized to account for achievable energy efficiency opportunities for the property
- Required for both pathways of the EEC milestone
- Basic data entry for building energy use characteristics
- Assumed energy efficiency measures will be automatically calculated
SYSTEM SIZE CAP

- The incentive amount will be capped at the amount listed in the Solar Sizing Tool.

- If the installed system size differs from that recommended by the Solar Sizing Tool, the incentive amount may be impacted as follows:
  - If the system is smaller in output than originally specified, the incentive amount will be based on the installed system size.
  - If the system is larger than the system cap that was originally specified, the additional capacity will not be incentivized.
Energy Audit Site Verifications

- The SOMAH PA will conduct site verifications on a sampling of projects to verify accuracy of the energy audit report and the SST
- Site verifications will occur within 30 days of the energy audit submission
- Non-compliance findings will be relayed to the Host Customer and energy audit firm within 60 days of the audit report submission
- Non-compliance findings can result in:
  - Reduction in maximum size of PV system
  - Reduced SOMAH incentive based on the new maximum size
STEP #2

Energy Efficiency Compliance Milestone

Submit
60 days to submit after Reservation Approval received.

Resubmitted

20 days for corrections

Review

Pending Site Verification*

Approved

*SOMAH projects are randomly selected for site verifications and may be required to complete this step.
Energy Efficiency Compliance Milestone Summary

- There are two pathways to complete this milestone
- Both pathways require the completion of the solar sizing tool
- Site verifications on sampling of projects to ensure accuracy of the Solar Sizing Tool
Intermission
Proof of Project Milestone

- Upfront Technical Assistance
- Reservation Request
- Energy Efficiency Milestone
- Proof of Project Milestone
- Incentive Claim
- Inspection
- Payment
Proof of Project Milestone

DOCUMENTS

- Copy of Executed Contract for System Purchase and Installation (for Host Customer Owned systems only); OR
- Copy of Alternative System Ownership Agreement (if System Owner is different than Host Customer);

AND

- Completed Proof of Project Milestone Checklist
- Certification of Compliance with SOMAH Performance Requirements for Third-Party Owned Systems (for third-party owned systems only)
- Documentation of VNEM Load Allocation (if changed from Reservation Request step)
ELIGIBLE PROJECT COSTS

Costs associated with the energy system and ancillary equipment, including:

- Solar equipment capital
- Engineering & design
- Construction & installation
- Engineering feasibility study
- Interconnection
- Mounting surface
- Building permitting
- Warranty & maintenance
- Sales & use tax
- Performance monitoring & reporting service equipment/services
Proof of Project Milestone

REPORTABLE COSTS

- PV modules
- Inverters
- Carport mounting surface material and installation
- On-site system measurement and reporting equipment and/or services
- Permitting Fees
- Balance of System

Please list the system costs as outlined in the sections below.

PV Modules *
$

Inverter(s) *
$

Carport Mounting Surface Material and Installation *
$

On-site system measurement, performance monitoring and data acquisition
$

Permitting Fees *
$

Balance of System *
$

Total Project Cost
$0.00
WARRANTY REQUIREMENTS

- All contractors must provide:
  - a minimum 10-year workmanship warranty to provide for no-cost repair and replacement of the system for any expenses not otherwise covered by the manufacturer
  - a minimum 20-year warranty to protect the purchaser against more than a 15% degradation of electrical generation output that may occur as a result of faulty installation
STEP #3

Proof of Project Milestone

Submit
240 days to submit after Reservation Approval received.

Resubmitted

Review

20 days for corrections

Suspended

Approved
Proof of Project Milestone Summary

- The Proof of Project Milestone is intended to show that the project is moving forward

- Reportable costs are broken down into 6 categories

- Contractors must adhere to the warranty requirements to have PPM approved
Live Poll
Incentive Claim Package
Incentive Claim Package

- The Incentive Claim Form must be completed, and signed by the Host Customer and System Owner.

- Any changes to the system must be included with supporting documentation and a recalculated incentive amount.
Incentive Claim Package

DOCUMENTS

- Completed Incentive Claim Form
- Job Training Affidavit
- Tenant Education Affidavit
- Documentation of VNEM Load Allocation (if changed from Proof of Project Milestone)
Incentive Claim Package

TENANT EDUCATION REQUIREMENTS

Host customer is required to notify tenants about participation in SOMAH and provide them with SOMAH-approved information on:

- Energy Efficiency
- Time-of-use rates (if relevant)
- Bill interpretation
- Solar training opportunities
Incentive Claim Package

JOB TRAINING REQUIREMENT

- Requirement can be met by having the trainee participate directly on the solar installation or in a supporting role for that project.

- An eligible job trainee is an individual who has completed the Job Trainee Intake Form and is one of the following:
  - An individual currently enrolled in an eligible job training program
  - An individual who graduated from an eligible job training program within 12 months of the start date of the SOMAH installation project
  - A tenant whose primary residence is the SOMAH property
Incentive Claim Package

JOB TRAINING REQUIREMENTS

- Solar Contractors will be required to hire the appropriate number of eligible job trainees for the appropriate timeframe based on the system size.

<table>
<thead>
<tr>
<th>System Size (CEC)</th>
<th>Required Number of Job Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 kW- &lt; 50kW</td>
<td>1 trainee and no less than 40 hours</td>
</tr>
<tr>
<td>50kW- &lt; 100kW</td>
<td>2 trainees and no less than 40 hours each trainee</td>
</tr>
<tr>
<td>100kW and greater</td>
<td>2 trainees and no less than 80 hours each trainee</td>
</tr>
</tbody>
</table>
Incentive Claim Package

LOCAL AND TARGETED HIRING

- **Local hires** consist of individuals residing within the county in which the SOMAH project is taking place.

- Individuals meeting the **targeted hire** goal can include:
  - Residents of disadvantaged communities
  - Affordable housing residents
  - Women
  - People of color
  - Other individuals who have face a barrier to employment
The Job Training Portal is a central hub for both contractors and trainees. The portal includes:

- Resume bank for contractors
- Job board for open SOMAH trainee positions
- Directory of eligible Job Training Organizations
POST A NEW JOB

Post a New Job

* Company

* Title

* Description

Salesforce Sans

* Zip code

Post
<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Mobile</th>
<th>Desired Job Position</th>
<th>State</th>
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</thead>
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<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Rosie Jeffrey</td>
<td><a href="mailto:rosie.jeffrey@energycenter.org">rosie.jeffrey@energycenter.org</a></td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>
# Job Training Portal

## MANAGE JOBS

<table>
<thead>
<tr>
<th>NAME</th>
<th>STATUS</th>
<th>CITY</th>
<th>CREATED DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job trainee</td>
<td>Open</td>
<td>Chula Vista</td>
<td>03/19/2019 11:32 AM</td>
</tr>
<tr>
<td>Lauren's test title</td>
<td>Open</td>
<td>Oakland</td>
<td>02/13/2019 10:36 AM</td>
</tr>
<tr>
<td>Rooftop Solar Installer</td>
<td>Not Filled</td>
<td>San Diego</td>
<td>03/19/2019 03:11 PM</td>
</tr>
<tr>
<td>Testing</td>
<td>Open</td>
<td>Richmond</td>
<td>03/18/2019 04:48 PM</td>
</tr>
</tbody>
</table>
Incentive Claim Package

PERFORMANCE REQUIREMENTS

▪ Performance Monitoring and Reporting Service (PMRS) is required for all systems

▪ The purpose of this requirement is to develop and increase the owner’s knowledge of the system’s performance and ensure adequate system maintenance

▪ The System Owner must contract with a PMRS provider for a minimum of 20 years and ensure 15-minute interval data production data is provided to the SOMAH PA, upon request
EXTENSION REQUESTS

An extension request may be granted if the project experience delays are due to:

- Circumstances beyond the control of the reservation holder
- Permitting-related delays
- Defective panels

- Extensions are limited to a maximum of 180 calendar days
Suspended Applications

- If your application is suspended at any point, you will have **20 days** to submit the requested documentation and/or explanation, otherwise the application will be cancelled, and the deposit will be forfeited
STEP #4

Incentive Claim Package

Submit
18 months to submit after Reservation Approval received

Resubmitted

20 days for corrections

Suspended

Review

Pending Inspection

Approved

Pending Payment

Incentive Check Issued
Incentive Claim Package Summary

- Tenant education requirement
- Job training requirement
- Job Training Portal
- Performance requirements
Live Poll
# Job Trainee Requirement

<table>
<thead>
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</tr>
</tbody>
</table>
Inspection

- Upfront Technical Assistance
- Reservation Request
- Energy Efficiency Milestone
- Proof of Project Milestone
- Incentive Claim
- Inspection
- Payment
On-site Inspection

WHAT WILL BE INSPECTED?

- Modules and Inverter(s)
  - Make, model, and quantity

- Installation Parameters

- Operational and performing within an acceptable range
INSPECTION PARAMETERS

- A new EPBB calculation may be run, and the incentive modified depending on the results of the inspection
  - Ex. Discrepancies between key project components and the project's Incentive Claim Documentation

- Inspection results must fall within set tolerances
  - Tilt (±3°), Azimuth (±5°), Summer Shading (May-October) (±5%)
The incentive amount submitted differs from that of the onsite inspection incentive results by 5-10%.

The Applicant neglected to respond to/provide requested information within the designated time period.

Failure by contractor or system owner to include the host customer on high-level service notification alerts indicating a non-functioning or poorly functioning system.
FAILURES

- The incentive amount submitted in the Incentive Claim documentation differs from that of the onsite inspection incentive results by more than 10%

- Three infractions as defined in previous slide

- System is found non-operational at the time of inspection due to equipment failure

- PV modules, inverters and/or performance meters were not on the CEC’s list of eligible equipment or otherwise ineligible for incentives

- Failure to notify the SOMAH PA of a system addition of any size after an incentive has been issued
Program Probation & Removal

Criteria for removal from the program is split into two categories:

- **High volume applicants** have 20 or more completed projects in the previous 12-month period
  - Program probation – 5 project failures
  - Program removal – 7 project failures

- **Low volume applicants** have fewer than 20 completed projects in the previous 12-month period
  - Program probation – 2 project failures
  - Program removal – 3 project failures
Inspection Summary

- All projects will be subject to inspections
- Inspection parameters
  - The program allows up to a 5% discrepancy tolerance
- Infractions, failures, & program removal
Incentive Payment Process

- The incentive cannot exceed the cost of the system, including incentives from other programs
- Checks will be sent to the designated payee approximately 30 days after the Incentive Claim Package is approved
- The application deposit will be returned to the Host Customer unless there is a designated 3rd party
Live Poll
Submitting Questions
Q&A: Application Process
PowerClerk

PowerClerk is the online application portal for SOMAH and will be used to:

- Create and submit new incentive applications
- Monitor the progress of incentive applications
- Keep incentive documentation in a central location
- Export all project information
- Send notifications about project status and updates
PowerClerk: New Account Registration

Register

User Information

Email Address:

Password:

Confirm:

First Name:

Last Name:

Company (optional):

Program

I'm not a robot

Register
PowerClerk: Adding Programs to Current Account
PowerClerk: Adding Programs to Current Account

Register for More Programs

<table>
<thead>
<tr>
<th>Agency Name</th>
<th>Program</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPR</td>
<td>Test Net Metering Program</td>
<td>Applicant</td>
</tr>
</tbody>
</table>

Program to Add

Once you added a new program, visit your homepage and it will appear in your program list.

Agency: Clean Power Research Test Agency

Program: Community Solar Program

Role: Applicant

Add
## SOLAR ON MULTIFAMILY AFFORDABLE HOUSING PROGRAM – PG&E

### New Upfront Technical Assistance Request

<table>
<thead>
<tr>
<th>Status</th>
<th>Projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Projects</td>
<td></td>
</tr>
<tr>
<td>Unsubmitted Projects</td>
<td></td>
</tr>
<tr>
<td>Inactive Projects</td>
<td></td>
</tr>
<tr>
<td>To Be Assigned</td>
<td></td>
</tr>
<tr>
<td>Under Review</td>
<td></td>
</tr>
<tr>
<td>Suspended Projects</td>
<td></td>
</tr>
<tr>
<td>Resubmitted Projects</td>
<td></td>
</tr>
<tr>
<td>Next Milestone Review</td>
<td></td>
</tr>
<tr>
<td>Upfront Technical Assistance Approved</td>
<td></td>
</tr>
<tr>
<td>Pending Application Deposit</td>
<td></td>
</tr>
<tr>
<td>Pending IOU Data</td>
<td></td>
</tr>
<tr>
<td>Reservation Approved</td>
<td></td>
</tr>
<tr>
<td>Pending Site Verification</td>
<td></td>
</tr>
<tr>
<td>Energy Efficiency Compliance Milestone Approved</td>
<td></td>
</tr>
<tr>
<td>Proof of Project Milestone Approved</td>
<td></td>
</tr>
<tr>
<td>Pending Inspection</td>
<td></td>
</tr>
<tr>
<td>Incentive Claim Approved</td>
<td></td>
</tr>
<tr>
<td>Incentive Check Mailed</td>
<td></td>
</tr>
</tbody>
</table>

### New Reservation Request Package

<table>
<thead>
<tr>
<th>Application Number</th>
<th>Current Status</th>
<th>Current Status Timestamp</th>
<th>Host Customer Company</th>
<th>Project Site Address</th>
<th>Incentive Track</th>
<th>Assignee Email</th>
<th>Nearest Due Date</th>
<th>Nearest Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>PGE-SOMAH-00016</td>
<td>Reservation Request Submitted</td>
<td>02/25/2019</td>
<td>Solar Rocks!</td>
<td>300 Vernon St.</td>
<td>Track B</td>
<td>[No Assignee]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Application Number</td>
<td>Current Status</td>
<td>Current Status Timestamp</td>
<td>Host Company</td>
<td>Project Site Address</td>
<td>Incentive Track</td>
<td>Assignee Email</td>
<td>Nearest Due Date</td>
<td>Nearest Deadline</td>
</tr>
<tr>
<td>--------------------</td>
<td>---------------</td>
<td>--------------------------</td>
<td>--------------</td>
<td>---------------------</td>
<td>-----------------</td>
<td>---------------</td>
<td>-----------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>PGE-SOMAH-00007</td>
<td>Upfront Technical Assistance Request Submitted</td>
<td>02/27/2019</td>
<td>The Testing Company</td>
<td>617 W 7th Street</td>
<td>Track A</td>
<td>Hannah Warner</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PGE-SOMAH-00013</td>
<td>Reservation Approved</td>
<td>02/27/2019</td>
<td>Solar Rocks!</td>
<td>300 Vernon St.</td>
<td>Track B</td>
<td>Laura Wong</td>
<td>04/28/2019</td>
<td>Energy Efficiency Compliance Milestone Deadline</td>
</tr>
<tr>
<td>PGE-SOMAH-00010</td>
<td>Cancelled</td>
<td>03/05/2019</td>
<td>Energy Solutions PV Installation</td>
<td>1520 Lakeside Drive</td>
<td>Track A</td>
<td>Rosie Jeffrey</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
PowerClerk: Application Page

View/Edit: PGE-SOMAH-00016

Unsubmitted
Upfront Technical Assistance
Reservation Request Package
EE Compliance Milestone
Proof of Project Milestone
Incentive Claim Package

Available Forms
Previous Forms
Access Grants For This Project
Attachments
Communications Sent to Laura.Wong@energycenter.org

Deadlines

eSignature Statuses

<table>
<thead>
<tr>
<th>Date</th>
<th>Documents</th>
<th>Signatories</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>2/25/2019 2:02:14 PM</td>
<td>Reservation Request Form.pdf</td>
<td>(<a href="mailto:cworth@energy-solution.com">cworth@energy-solution.com</a>) Expired in DocuSign demo</td>
<td>Expired in DocuSign demo</td>
</tr>
<tr>
<td></td>
<td>Affidavit Ensuring 100% Tenant Economic Benefit.pdf</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Go to PGE-SOMAH-
E-Signatures with DocuSign

Step 3: The following documents can be signed and submitted digitally via DocuSign. Click "Preview Document" to generate a copy of the document for your review and then click "Request Signatures" to send a digital copy of the documents to all required parties.

- Reservation Request Form
- Affidavit Ensuring 100 Percent Tenant Economic Benefit

E-Signature Status

<table>
<thead>
<tr>
<th>Reservation Request Form</th>
<th>Not yet previewed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Host Customer</td>
<td><a href="mailto:laura.wong@energycenter.org">laura.wong@energycenter.org</a></td>
</tr>
<tr>
<td>System Owner</td>
<td><a href="mailto:laura.wong@energycenter.org">laura.wong@energycenter.org</a></td>
</tr>
<tr>
<td>Applicant</td>
<td><a href="mailto:laura.wong@energycenter.org">laura.wong@energycenter.org</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Affidavit Ensuring 100% Tenant Economic Benefit</th>
<th>Not yet previewed</th>
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<tr>
<td>Host Customer</td>
<td><a href="mailto:laura.wong@energycenter.org">laura.wong@energycenter.org</a></td>
</tr>
</tbody>
</table>
Identifying a Census Tract Code in CalEnviroScreen 3.0

- The applicant will be required to enter the Project Site's census tract code
- CalEnviroScreen 3.0 is linked as a resource to find this code
PowerClerk Summary

• All applications must be submitted through PowerClerk
• There will be five utility portals
• Communications relating to incentive applications will be sent through PowerClerk
• An e-signature option will exist for some documents, but it's use is not required
SOMAH Bidding Tool
SOMAH Bidding Tool

- The online bidding tool will be used by SOMAH participants to:
  - Find and select eligible contractors

- The online bidding tool will be used by SOMAH contractors to:
  - Register to leverage SOMAH incentives for your customers
  - Quickly demonstrate compliance with program requirements
  - Gain access to job leads from customers looking for SOMAH eligible contractors
Registering for a SOMAH Bidding Tool account:

- An email invitation to create an account for the SOMAH Bidding Tool will be sent
- The individual who registers will be the designated account holder for their company
SOMAH Bidding Tool

- The information you provide will help connect you with interested property owners
- A service territory can be designated to help identify potential projects
Your bids are in! Below is a comparison of bids from the three service providers you selected. When you select a winning bidder, all bidders will be notified and the winner will reach out to you to schedule installation. Congratulations, you are on your way to a new solar project!

<table>
<thead>
<tr>
<th></th>
<th>Comp A</th>
<th>Comp B</th>
<th>Comp C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Cost</td>
<td>$20,571</td>
<td>$19,999</td>
<td>$25,500</td>
</tr>
<tr>
<td>System Size</td>
<td>155 kW</td>
<td>155 kW</td>
<td>172 kW</td>
</tr>
<tr>
<td>Est. Project Completion</td>
<td>9/1/19</td>
<td>12/15/19</td>
<td>11/30/19</td>
</tr>
<tr>
<td>Ownership Type</td>
<td>Customer Own</td>
<td>Customer Own</td>
<td>Customer Own</td>
</tr>
<tr>
<td>CSLB Number</td>
<td>123456</td>
<td>789101</td>
<td>112131</td>
</tr>
</tbody>
</table>

[View Bid] [View Bid] [View Bid]

Choose [Choose] [Choose] [Choose]
The SOMAH PA will verify your credentials and completion of this training prior to sending your invitation to join the SOMAH Bidding Tool.

If any customers come to the program looking for a SOMAH developer in your service territory, your name will be included in the list of qualified providers.
Bidding Tool Summary

- Online platform to be used to connect property owners with eligible contractors
- Provide property owners with an apples to apples comparison of eligible contractors in their service territory
Worksite Safety

(Per Title 8 of the California Code of Regulations (T8CCR) section 3203)

- Every employer is required to develop and implement an effective, written workplace safety program or **Injury and Illness Prevention Program (IIPP)**
Worksite Safety

INJURY AND ILLNESS PREVENTION PROGRAM

- System for ensuring employee compliance with safe work practices
- Safety communication system with employees
- Accident investigation
- Procedure for correcting unsafe/unhealthy conditions
- Safety and health training and instruction
- Recordkeeping and documentation
Worksite Safety

(Per Title 8 of the California Code of Regulations (T8CCR) section 1509)

- Every employer is required to adopt a written **Code of Safety Practices** and the Supervisor shall have it readily available, including:
  - Personal Protective Equipment
  - Heat Illness Prevention
  - Hand and Power Tools
  - Fall Protection and Rescue
Worksite Safety

CODE OF SAFETY PRACTICES (CONT.)

- Ladder Safety
- Electrical Safety, Arc Flash Protection, and Lockout/Tagout
- Heavy Equipment and Rigging
- Excavation and Trenching
- Transportation
- Hazardous Communication, Battery Handling
Worksite Safety

(Per Title 8 of the California Code of Regulations (T8CCR) section 1509)

- Supervisors are required to conduct Toolbox or Tailgate safety meetings with their crews at least every 10 working days to emphasize safety

(Per Title 8 of the California Code of Regulations (T8CCR) section 1512)

- Every employer shall ensure the availability of a suitable number of trained persons to render first aid

**Recommendation:** Supervisors/Foremen receive OSHA-10 and CPR/First Aid training
Services Provided by the SOMAH PA
Services Provided by the SOMAH PA

- The SOMAH PA team is here to help you navigate this process throughout the duration of the program.
- In addition to having a designated application manager for questions about your application, the SOMAH PA will also be available for questions regarding program requirements and technical assistance.
Services provided by the SOMAH PA

- The SOMAH PA can also help you learn more about, and coordinate with other statewide programs.
- Trainings on other programs will be available to contractors in the future.
Marketing Collateral on CalSOMAH.org

- SOMAH PA will be creating collateral to help contractors market the SOMAH program

- There will be a future survey to gather information and formats that would be most useful for your company to share the SOMAH program with your stakeholders, expected to be released in Q2 of 2019
SOMAH Branding Guidelines

- Use the term **Eligible SOMAH Contractor** for the designated primary contact person.

- Contractors must refer to the **SOMAH Brand Guidelines** for branding information and protocol.
SOMAH Branding Guidelines

- Logo usage and the title of “Eligible SOMAH Contractor” is strictly limited to the designated primary contact of the company, who has a valid CSLB # and has completed this Eligibility Training.

- Logos and the SOMAH name must be used in strict conformity with the standards as provided by the SOMAH PA.

- Cannot use the Logos in any way that would indicate, directly or indirectly, that SOMAH has endorsed or is endorsing any product or service.
Live Poll
Wrap-up
Next Steps

ELIGIBLE CONTRACTOR CONTACT INFORMATION

- Each company must select one individual to serve as the PowerClerk primary contact and the Online Bidding Tool Account Holder

- Must complete and submit Google Form to be added to our public facing lists of Eligible Contractors

- Create an account for the SOMAH Online Bidding Platform
Next Steps

SOMAH ELIGIBLE CONTRACTOR TRAINING SURVEY

▪ Please complete our Post-webinar survey!
Next Steps

POWERCLERK

- PowerClerk is not currently live
  - Expected to launch in Q2 of 2019
- Expect to receive an email with instructions on how to register once PowerClerk goes live
Submitting Questions
Q&A
Thank you!

Questions?

contact@CalSOMAH.org

858-244-1177 ext. 5
References

- SOMAH Handbook
- Cal/OSHA example Plate A-3
- CAL/OSHA Safety Meeting topics and publications
- CAL/OSHA Safety & Health Training and Instruction Requirements