![SOMAH logo]

**Solar On Multifamily
Affordable Housing**

SOMAH

Semiannual Progress Report

Reporting period
July 1, 2022 – December 31, 2022

Table of Contents

Table of Figures

1. Executive Summary

The seventh Semiannual Progress Report (SAPR) covers 2022 activity highlighting a steady stream of projects nearing completion, participants utilizing the Progress Payment Pathway, and interconnected and paid completed SOMAH projects. While the slower intake of new applications from Q1 and Q2 continued, there was a slight uptick in Q3 and Q4 with 35 new submissions before the end of 2022. While not all those projects were eligible or remained active, this was a noteworthy improvement in new application submission from Q1 and Q2 2022. Despite the lower application volume, the SOMAH Program Administrator (PA) continues to emphasize understanding and adapting to current environmental and industry challenges while striving to implement a resilient and successful program. Supportive efforts included filing a Petition for Modification (PFM) in effort to increase SOMAH incentives as well as expanded and revamped services for participants like the Affordability Prescreen, a suite of Technical Assistance (TA) Support Services and the launch of a new SOMAH website with enhanced user design experience and new helpful resources. In-person conferences, tenant education workshops and ribbon-cuttings have helped celebrate SOMAH systems and their benefits to tenants and communities. In-person conferences included Housing California, the Southern California Association for Non-Profit Housing (SCANPH) Conference, the California Coalition for Rural Housing (CCRH) Rural Housing Summit, the Venture Housing Opportunities Made Easier (HOME) Conference and the San Diego Housing Federation (SDHF) Conference. The SOMAH PA has continued its monitoring, evaluation and research efforts to garner valuable feedback for the program through tenant surveys and subcontractor interviews. Q3 and Q4 2022 efforts included the completion report and evaluation from the subcontractor interviews in Q2. Marketing, education and outreach (ME&O) efforts have also resumed in-person outreach as COVID-19 restrictions have decreased throughout 2022.

Additional funding was released for PG&E, Liberty and PacifiCorp in the second half of the year, and the program maintained plentiful funding for all IOU territories and continues to allow for immediate application review with no waitlists. Throughout the year, participants continued to report industry impacts such as historic inflation and supply chain challenges that perpetuated delays in construction timelines and project completion throughout 2022. As completed projects continue to closeout, the SOMAH PA has utilized these opportunities to showcase the impact SOMAH contributes to communities through success stories and video testimonials that have been posted on the SOMAH website and are available for outreach purposes. Stakeholder outreach by the SOMAH PA, SOMAH-contracted community-based organizations (CBOs) and new

co-marketing partners have helped increase program awareness with external webinars and program announcements.

1.1   COVID-19 Acknowledgement

The COVID-19 public health crisis, and the SOMAH PA's response, continued to impact the program in this reporting period. While the world has continued to navigate the impacts of the COVID-19 public health crisis, the SOMAH PA acknowledges the impacts and lingering effects on SOMAH participants, stakeholders and the solar industry. The SOMAH PA understands that the industry will likely be affected for some time to come and encourages participants to provide feedback on the barriers and impacts they are facing. The SOMAH PA continues to receive and solicit participant and stakeholder feedback through outreach and engagement in order to support and maintain a pipeline of active SOMAH projects. The effects of the COVID-19 public health crisis continue to notably impact application progression and will for the near future as the industry, country and greater world are still navigating logistical challenges of supply chain issues, rising costs from inflation and an evolving workforce that is recovering from abrupt and unforeseen impacts.

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

2.   Background

The Solar On Multifamily Affordable Housing (SOMAH) Program provides financial incentives for installing photovoltaic (PV) energy systems on multifamily affordable housing. The program is designed to deliver clean power and credits on energy bills to hundreds of thousands of California's affordable housing residents. The program was created by California Assembly Bill (AB) 693 (Stats. 2015, Ch. 582), authored by State Senator Susan Talamantes Eggman (D-District 05) (then Assemblymember) and signed by Governor Jerry Brown in 2015. Senate Bill (SB) 92 (Stats. 2017, Ch. 26), adopted with the 2017-18 State Budget, further clarified the budget for the program. California Public

Utilities Commission (CPUC) Decision (D.)17-12-022 (effective Dec. 14, 2017) implemented AB 693 and changed the name of the program to the Solar On Multifamily Affordable Housing (SOMAH) Program to distinguish it from other state clean energy and low-income solar programs. D.17-12-022 established the program's budget, incentive structure and eligibility policies, among other items.

The SOMAH Program serves electric utility and community choice aggregator (CCA) customers in the territories of Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), San Diego Gas & Electric Company (SDG&E), Liberty Utilities Company and PacifiCorp. Funded through greenhouse gas (GHG) allowance auction proceeds, SOMAH has a program budget of up to $100 million annually for 10 years and an overall target to install at least 300 megawatts (MW) of generating capacity by 2030.

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

2.1 Application Pathways: Track A and Track B

The SOMAH Program is designed to accommodate participation at varying stages of a solar PV installation, ranging from initial property owner engagement and assessment of a property's solar installation capacity to projects for which the contractor has already been selected or installations that are underway or recently completed. There are two tracks to apply for a SOMAH incentive: Track A and Track B. The SOMAH PA designed the program with two incentive track choices to tailor the user experience based on the stage of a project, whether the program participant is just starting their journey going solar, has a shovel-ready project or has recently completed the installation. Both

tracks provide fixed, capacity-based incentives for qualifying solar energy systems, using the Expected Performance Based Buydown (EPBB)[1] methodology.

Track A is designed for property owners who receive direct program marketing and outreach from the SOMAH PA and its network of CBO partners. Track A provides Upfront Technical Assistance (TA) and Support Services for property owners to supply them with a well-rounded understanding of their property's energy needs and the educational, technical and financial resources that are available to facilitate valuable energy efficiency upgrades and a solar installation. Participants that select Track A have their incentive funding earmarked for the duration of the three-month Upfront TA period, prior to a reservation request. Track A participants typically do not have an identified contractor and are guided through a multiple bid process to select an eligible solar contractor for their project. The SOMAH PA has previously noted instances of an owner opting to withdraw from Track A to reapply as Track B after receiving Upfront TA support services, ahead of the multiple bid process. In these situations, the SOMAH PA will continue working with owners to tailor their experience to support the successful participation of each project, regardless of application track.

Track B is designed for property owners who receive direct program marketing and outreach from an eligible contractor, project developer or similar entity. Projects in this track have already identified an eligible solar contractor who has performed or will provide the client assessment and design services that may include a solar site assessment, initial design, financing options review, contract review, etc. Projects that select Track B are not eligible for Upfront TA support services and may waive the requirement to participate in the multiple bid process by submitting the Multiple Bid Waiver with the Reservation Request Package. Instead of Upfront TA, Track B projects are eligible for Standard Technical Assistance (TA) support services, which 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.

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

Figure 1 – Track A and Track B Application Steps

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

*Optional step

Reservation Request → Energy Efficiency Milestone → Proof of Project Milestone → *Progress Payment Pathway → Incentive Claim → Inspection → Payment

*Optional step

2.2   Eligibility Options: Qualification Option A — Low-Income and Qualification Option B — Disadvantaged Communities

Regardless of the application track selected, properties can qualify for the SOMAH Program in one or both ways, known as Qualification Option A and Qualification Option B. A property may be eligible for SOMAH by meeting the requirements of Option A, Option B or both. All properties must be at least five units and meet the definition of deed-restricted, affordable housing in PU Code Section 2852(A)(3)(a)(i) and also meet Qualification Option A or B. Qualification Option A refers to properties in which at least 80% of the units are reserved for households at or below 60% of the area median income (AMI); and Qualification Option B refers to properties that are located in a disadvantaged community (DAC) as identified by CalEnviroScreen and CalEPA. Section 3.1.1, Applications and Incentive Statistics, further elaborates on each type of the qualification options for the SOMAH Program.

2.3   Program Budget

SOMAH has a program budget of up to $100 million annually, with at least 90% of the funds allocated to incentives and up to 10% allocated to the administrative budget. 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 investor-owned utilities (IOUs). The SAER is posted twice a year to the California Distributed Generation Statistics website in conjunction with this Semiannual Progress Report (SAPR).

2.3.1 Program Administrative Budget

The administrative budget is shared by the SOMAH PA, CPUC ED and the IOUs. The SOMAH PA tracks the program expenses in four main categories: SOMAH Program Administration; Marketing, Education & Outreach (ME&O); Technical Assistance; and Workforce Development. Figure 2 provides a snapshot from the SAER and outlines total program administrative expenditures through December 31, 2022.

Figure 2 – Total Program Administrative Expenditures by Category

Category	
SOMAH Program Administration	$16,794,337
SOMAH Marketing, Education & Outreach (ME&O)	$10,305,726
SOMAH Workforce Development	$1,866,538
SOMAH Technical Assistance	$1,144,629
SOMAH Evaluation Expenses[2]	$608,851
Investor-owned Utility (IOU) Expenses	$4,336,395
Total	$35,056,477

More detailed expenditure information can be found at https://www.californiadgstats.ca.gov/programs/#_subsection_17.

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 on a weekly basis. Because each IOU territory's annual incentive budget varies based on their specific GHG allowance auction proceeds, the SOMAH PA maintains five individual application queues and up to five waitlist queues, when applicable. The funds for each utility territory may be released at separate times, with the collections based on each utility's Energy Resource Recovery Account (ERRA) or Energy Cost Adjustment Clause (ECAC).

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[2] 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.

PG&E and PacifiCorp funding are released quarterly versus the annual lump sum release of the other territories.

A summary of funding releases for the second half of 2022 includes the following territories and dates: PG&E (November 29, 2022), Liberty (November 29, 2022) and PacifiCorp (August 11, 2022, and November 29, 2022). Figure 3 summarizes the committed and remaining budget for the SOMAH Program. Figure 4 summarizes the program dollars collected by fiscal year to date and identifies application totals and available program funds.

Figure 3 – Project Capacity and Budget

		Waitlist		Earmarked		Pending Reservation		Reserved		Completed		Application Totals		Total Budget ($)	Remaining Budget ($)
		Capacity (MW)	Budget ($)	Capacity (MW)	Budget ($)	Capacity (MW)	Budget ($)	Capacity (MW)	Budget ($)	Capacity (MW)	Budget ($)	Capacity (MW)	Budget ($)		
PG&E	Track A	0	0	0.055	176,206	0	0	0.116	295,404	0	0	0.171	471,610	215,960,977	155,409,108
	Track B	0	0	0	0	2.877	5,345,934	23.387	47,771,239	3.539	6,963.086	29.803	60,080,259		
	Total	0	0	0.055	176,206	2.877	5,345,934	23.503	48,066,643	3.539	6,963.086	29.974	60,551,869		
SCE	Track A	0	0	0.500	1,598,776	0	0	0.344	929,757	0	0	0.844	2,528,533	268,718,659	214,266,102
	Track B	0	0	0	0	0.673	1,618,896	17.117	36,969,339	7.468	13,335,789	25.258	51,924,024		
	Total	0	0	0.500	1,598,776	0.673	1,618,896	17.461	37,899,096	7.468	13,335,789	26.102	54,452,557		
SDG&E	Track A	0	0	1.117	3,765,090	0	0	0	0	0	0	1.177	3,765,090	67,152,167	47,073,018
	Track B	0	0	0	0	0.142	295,114	5.455	11,493,515	2.248	4,525,430	7.845	16,314,059		
	Total	0	0	1.117	3,765,090	0.142	295,114	5.455	11,493,515	2.248	4,525,430	9.022	20,079,149		
PacifiCorp	Track A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0	0	6,882,262	6,882,262
	Track B	0	0	0	0	0	0	0	0	0	0	0	0		
	Total	0	0	0	0	0	0	0	0	0	0	0	0		
Liberty Utilities	Track A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0	0	2,153,055	1,872,515
	Track B	0	0	0	0	0	0	0.148	280,540	0	0	0.148	280,540		
	Total	0	0	0	0	0	0	0.148	280,540	0	0	0.148	280,540		
TOTAL	Track A	0	0	1.732	5,540,072	0	0	0.460	1,225,161	0	0	2.192	6,765,233	560,867,120	425,503,005
	Track B	0	0	0	0	3.692	7,259,944	46.107	96,514,633	13.255	24,824,305	63.054	128,598,882		
	Total	0	0	1.732	5,540,072	3.692	7,259,944	46.567	97,739,794	13.255	24,824,305	65.246	135,364,115		

Figure 4 – Cumulative Program Budget

	2016 Budget ($)	2017 Budget ($)	2018 Budget ($)	2019 Budget ($)	Under-collections True-up ($)	2020 Budget ($)	2021 Budget ($)	2022 Budget ($)	Application Totals ($)	Total Budget ($)	Remaining Budget ($)
PG&E	1,740,992	4,359,110	39,330,000	33,963,300	31,620,584	34,898,605	28,448,280	41,600,106	60,570,648	215,960,977	155,390,329
SCE	2,733,251	4,536,250	35,213,205	36,768,272	45,542,591	37,689,090	40,208,400	66,027,600	54,451,422	268,718,659	214,267,237
SDG&E	0	0	9,270,000	9,104,076	11,343,785	10,294,957	9,831,156	17,308,193	20,079,149	67,152,167	47,073,018
PacifiCorp	422,443	961,291	1,009,512	1,150,528	0	1,177,394	1,090,332	1,070,762	0	6,882,262	6,882,262
Liberty Utilities	132,440	258,329	314,706	419,517	0	326,327	300,128	401,608	280,540	2,153,055	1,872,515
TOTAL	**5,029,126**	**10,114,980**	**85,137,423**	**81,405,693**	**88,506,960**	**84,386,373**	**79,878,296**	**126,408,269** [3]	**135,381,759**	**560,867,120**	**425,485,361**

[3] 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 true-up the final three months of the year once the IOUs submit their Joint Advice Letter. 2022 figures will be amended through a true-up in 2023.

3. Program Progress — Key Performance Areas

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

3.1 Program Administration

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

3.1.1 Applications and Incentive Statistics

SOMAH continues to have ample funding available in all five IOU territories, with an available incentive budget of more than $425 million across the program at the end of December 2022. No IOU territory has had a waitlist since Q4 2020 (SDG&E). Stakeholders and interested applicants should refer to the Program Funding page on CalSOMAH.org for the most 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 canceled by the SOMAH PA due to missed deadlines or not meeting program eligibility requirements, or voluntarily withdrawn by the applicant or host customer. Second, incentive funds may become available through the course of application review. For example, adjustments made to system size after receiving consumption data from the IOU will affect the reserved incentive amount. The SOMAH PA has observed that nearly all projects will adjust their system size after receiving site consumption data during the Reservation Request Milestone (or during Upfront TA for Track A projects), therefore, modifying the requested incentive with the system size adjustment. With adjustments like this, the previously allocated funds are then returned to the pot of available funding or applied to waitlisted projects (when applicable)

through an ongoing reconciliation process by the SOMAH PA. Similarly, the program maintains a small buffer in each territory's budget to accommodate potential increases in system sizes and incentive amounts resulting from consumption data from the IOU, anticipated future load additions, solar sizing tool recommendations or other reasons.

Without an easy method for applicants to retrieve the tenant consumption data before the program application is submitted for review, additional steps are completed by the SOMAH PA and the applicant, which typically result in a longer reservation request review timeline. In response to Phase II recommendation feedback finding the attainment and timing of consumption data as a barrier, the PA coordinated and implemented application-related program and process improvements throughout 2022. The largest push for application streamlining efforts is included in the changes currently proposed through Handbook 6.0. More information on handbook changes is outlined in Section 4.2.1, Program Handbook. The SOMAH PA presented a session on streamlining SOMAH's application process at the Q2 2022 Public Forum, focusing on forthcoming updates to the Reservation Request Milestone and potential handbook changes. During the public forum, the PA spoke about a proposal for eligibility prescreening of the regulatory agreement or deed restriction documentation and discussed reservation request streamlining efforts focused on bringing relief and support to the Reservation Request Milestone. As of December 2022, the Affordability Prescreen support service is live at calsomah.org/prescreen. The prescreen service provides applicants with a high-level review of a property's regulatory documentation prior to submitting a formal application through the application portal, PowerClerk. Prescreening properties for SOMAH eligibility seeks to alleviate administrative burden on both applicants and application assignees.

Streamlining efforts for the Reservation Request Milestone, currently proposed through Handbook 6.0, would be an application workflow change to break the single-phase milestone into two more manageable phases. The phased approach (Phase I and Phase II) is aimed to reduce the initial administrative burden of submitting and completing the Reservation Request Milestone, provide a shorter timeline for the application to get to the historical consumption data request and improve overall streamlining of the milestone requirements and process flow to better match project workflows from the customer acquisition, project design and engineering workflows. Stakeholders and interested applicants should refer to the Apply page on CalSOMAH.org for the most up-to-date information on the application process.

Figure 5 – Application Status by IOU Territory

Program	Active	Complete/ Incentive Paid	Canceled/ Withdrawn	**Total**
PG&E	220	22	161	**403**
SCE	101	37	85	**223**
SDG&E	37	13	40	**90**
Liberty Utilities	2	0	0	**2**
PacifiCorp	0	0	1	**1**
Total	**360**	**72**	**287**	**719**

N = 719

Between July and December 2022, a total of 35 applications were submitted to the SOMAH Program. Of these, seven new applications were submitted in Q3 while the remaining 28 applications were submitted in Q4. Five of the new applications were Track A projects, and all were submitted in the larger IOU territories (PG&E, SCE and SDG&E). No new 2022 applications were submitted in Liberty Utilities or PacifiCorp territories, with the last Liberty Utilities application submitted in 2020 and PacifiCorp's last submitted in 2019. However, the SOMAH PA has focused on marketing and outreach coordination with both Liberty and PacifiCorp in the latter half of 2022, with continued efforts and engagement planned for 2023. The number of new applications submitted in the previous reporting periods are as follows:

- 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

The larger spikes in new application submissions (greater than 100) aligned in reporting periods where incentive step-downs occurred, spurring activity when applicants made the effort to submit new applications at the higher incentive rate before incentive levels decreased for the following program year (July 2020 and October 2021). The absence of an application submittal spike in 2022 aligns with the deferred incentive step-down. As discussed in more detail in Section 4.2, Program Design and Updates, efforts from the SOMAH PA resulted in the planned annual incentive step-down being put on hiatus pending the SOMAH PA's pursuit of the Petition for Modification (PFM).

Both Phase I and Phase II of SOMAH's third-party evaluation 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. The SOMAH PA also recognizes that new applications have been submitted at a continued slower pace throughout 2022, which has stalled overall growth and progression toward meeting program goals. This slowdown of new applications was a key factor in the SOMAH PA's pursuit of the Petition for Modification (PFM) effort to increase incentive levels in August 2022. The SOMAH PA awaits a Decision from the CPUC on the PFM.

Figure 6 – Cumulative Applications Received
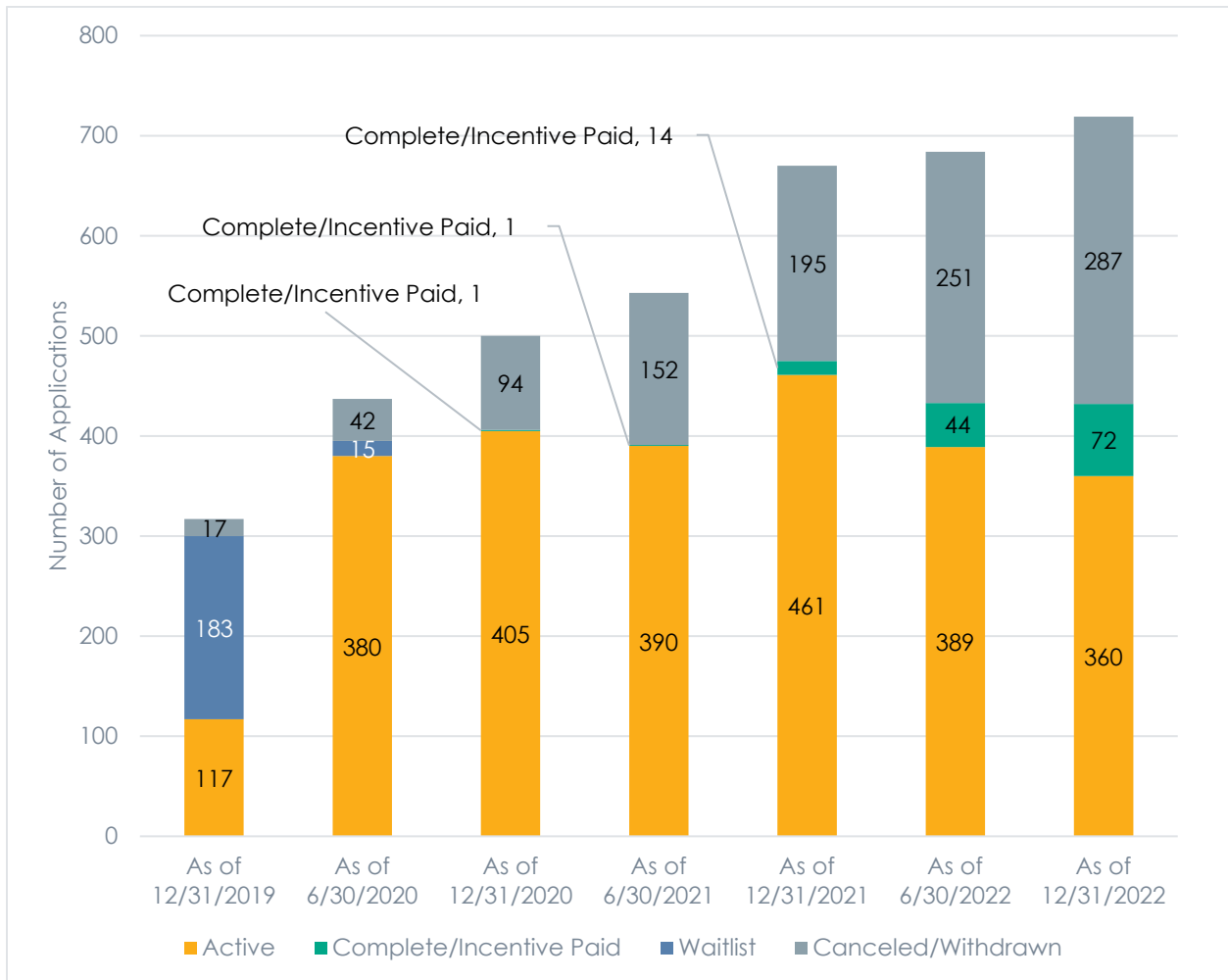
Per CPUC D.17-12-022,[4] the program is required to step down incentive rates annually, and the incentive step-down falls on July 1 of each year. In 2021, the July 1 incentive step-down was postponed due to a pending National Renewable Energy Laboratory (NREL) report used for the incentive step-down analysis. The CPUC approved the SOMAH PA's 120-day extension request, which provided the PA enough time to complete the analysis and stakeholder outreach prior to the Step 3 incentive rate

[4] Per CPUC D.17-12-022, "Incentive levels will decrease by the annual percent decline in residential solar costs as reflected by NREL reports, or 5% annually, whichever is less."

deployed on October 30, 2021. Since the 2021 step-down, new application submissions have significantly stalled, with only 53 applications received since the October 2021 step-down. Of those 53 applications, 19 have since been canceled, leaving six Track A and 28 Track B projects as valid new submissions in this reporting period. With respect to the 2022 July 1 step-down cycle, the SOMAH PA was granted an extension to pause the incentive step-down until a Decision on the PFM has been issued by the CPUC. This plan for the Incentives PFM and extension to pause the 2022 incentive step-down was shared with program stakeholders at the Q2 Public Forum on May 25, 2022, and shared in an email blast to the listserv on June 24, 2022. As a result of the extension for incentive step-down for 2022, the previous pattern of increased application submissions prior to July 1 did not occur in 2022.

The program saw a notable amount of canceled and withdrawn applications throughout 2022, both due to voluntary withdrawals and for failure to provide the required documentation by the required timeline, totaling 63 applications that were canceled or withdrawn during this reporting period. Of the 63 canceled applications, 37 were canceled before reaching reservation approval, while the remaining 26 canceled at a milestone after the Reservation Request Milestone. Several of these applications were canceled because they did not meet eligibility criteria for the SOMAH Program after an in-depth review of the documentation provided and conversations with applicants and host customers. As noted above, the SOMAH PA standardized a previously informal offering for the Affordability Prescreen service that provides participants and interested parties the opportunity to engage with the SOMAH PA outside of a PowerClerk application submission to vet their regulatory agreement and general eligibility criteria. With this formalized offering, prescreen efforts are being tracked to record projects with prescreens that turn into active application submissions and/or prescreened projects where eligibility was confirmed that may be a good fit for further marketing, education and outreach efforts. Further information on prescreen volume and throughput to new application submissions will be reported during subsequent progress reports as the data is still too new to report in aggregate. The SOMAH PA hopes that this formalized prescreen offering will also help reduce the number of applications submitted that are later canceled for eligibility issues that could have been identified through the less burdensome Affordability Prescreen service.

Although the SOMAH PA has extended considerable flexibility and support to help stakeholders and participants navigate the new environment caused by COVID-19, participants are still facing ongoing challenges. For example, applicants have cited industry impacts, such as supply chain shortages for steel and other PV system equipment, and shifting financial priorities based on the real-time needs of property

owners and tenants. Where appropriate, the PA is making efforts to follow up with these participants after cancellation or withdrawal to determine if the projects are still viable and/or interested in the SOMAH Program. The SOMAH PA has also altered standardized communications to address cancellation and withdrawal circumstances more specifically, to set the stage for further engagement where appropriate.

From continued conversations with contractors and property owners through focus groups, survey responses and evaluation efforts, it is evident that contractors are continuing to prioritize their portfolios of SOMAH projects and are eager to move forward with completing installations and interconnections to finalize projects. Applicants and property owners have often shared valuable cancellation feedback for the projects that have chosen not to or are unable to move forward with the SOMAH Program after initial application submission. This feedback has helped the SOMAH PA better address barriers to program participation, which have been supported through offerings like the previous Energy Efficiency Compliance Milestone (EECM) Postponement option (ended Sept. 13, 2021); the Progress Payment Pathway, included in Section 3.1.2, Program Payments; the option (Handbook 5.0) to submit select milestones in tandem; and removing application deposits for projects located in disadvantaged communities or on tribal lands. Additional stakeholder and participation feedback contributed to the adjusted Upfront TA and EECM submissions timelines proposed in Handbook 6.0. The SOMAH PA is also dedicated to working with the IOUs to liaise with interconnection and SOMAH application efforts and rollout of virtual net energy metering (VNEM) billing credits to tenant and property owners. The PA is committed to supporting SOMAH projects in ensuring timely delivery of SOMAH bill credits for completed projects and has structured ongoing check-ins with the IOUs to support and monitor this effort.

The SOMAH PA maintains consistent communication with SOMAH contractors with active applications to best understand their project timelines and any barriers they may be facing. This interface with contractors and program participants also helps to support forecasting efforts for program activities as well as tailored project assistance for unique application situations. As application activity picked up for 18-month reservation expiration due dates, the number of Incentive Claim Package deadline extensions submitted in the previous reporting periods are as follows:

- July 2021–December 2021: 24 extension requests processed
- January 2022–June 2022: 98 extension requests processed

Since July 1, 2022, the SOMAH PA has processed an additional 171 requests for Incentive Claim Package deadline extensions. Each extension request is reviewed and

addressed on a case-by-case basis. From program start, to date, the average length of an Incentive Claim Package deadline extension request is 135 days. Although the maximum term per extension request is 180 days, and most of the extension requests are for the full 180 days, the current average length illustrates that applicants are giving consideration to timing before submitting an extension requesting the full-term length. Similar to previous reporting periods, the large majority of extension requests to date have cited one of three reasons: 1) circumstances beyond the control of the reservation holder that prevented the system from being installed as described in the Reservation Request Package; 2) there was a problem in the permitting process, and it was the cause of delay; or 3) the supporting documentation for these extension requests often relayed information relating to supply chain issues (such as steel for carport installations), permitting delays and interconnection challenges for unique and complex projects, as well as unforeseen engineering challenges. Despite these extensions, the program observed a significant increase in completed projects throughout 2022, with the amount of completed and paid projects more than quadrupling in the past 12 months from 14 to 71.

The SOMAH PA utilizes application milestone deadlines in conjunction with construction timelines in tracking efforts to assess progress of the application queue and broader program planning efforts, like project completion estimates. Of the data collected at the first application step, the Reservation Request Milestone, the applicant is required to enter the project's projected construction start date or actual construction start date. This information helps identify where the project is in the life cycle of installation at the time of the SOMAH application. While the construction and interconnection processes are bifurcated from the SOMAH incentive application, the timing of installation and interconnection directly relate to the project's ability to submit for the incentive claim and progress payment (optional). At the start of each milestone after receiving reservation approval, Energy Efficiency Compliance Milestone, Proof of Project Milestone and Incentive Claim Milestone, applicants are prompted to report if construction has started or update the projected construction start date if not. Figure 7 shows the construction timeline information reported in applications through Q2 2023.

Figure 7 – Construction Timeline Insights

| Date	Construction has Commenced	Projected Construction Start Date
2020	28	5
2021	67	198
Q1 2022	10	53
Q2 2022	2	24
Q3 2022	0	35
Q4 2022	0	2

Impacts on construction plans and project timelines are still prevalent across active projects and will likely continue to delay project completion timelines for the immediate future. The number of projects reporting to have started construction decreased by 37% between the end of 2021 and December 31, 2022. Application data from earlier in the program, Year 1 and into Year 2, reported that most projects approximated their construction to begin in 2021. However, with the dramatic shifts across the world in 2020 and continuing impacts into 2022, many of these projects have adjusted their timelines to accommodate delays due to the evolving state of the world and the solar industry. Construction timeline projections have continued to shift through 2022 as projects progress and are better able to forecast construction timelines with more certainty. The SOMAH PA predicts that estimated construction timelines will continue to fluctuate while California navigates health and safety standards statewide. As previously mentioned, the SOMAH PA receives additional information on project timelines and delays with extension requests for projects that are unable to meet their incentive claim deadline due to circumstances beyond their control. Despite these challenges, the SOMAH PA aims to support the pipeline of SOMAH projects that have continued to persevere through uncertainty and continued obstacles. Updated construction start dates will continue to be reported as projects progress to future milestones through their 18-month reservation period, as applicants are prompted to update their projected and executed construction start dates. These timeline updates will continue to be made available in subsequent progress reports. The SOMAH PA predicts that estimated construction timelines will continue to fluctuate while California navigates health and safety standards statewide. As previously mentioned, the SOMAH PA receives additional information on project timelines and delays with extension requests for projects that are unable to meet their incentive claim deadline due to circumstances beyond their control.

Figure 8 – Milestones by IOU Territory

Program	Upfront Technical Assistance	Reservation Request	Energy Efficiency Milestone	Proof of Project Milestone	Progress Payment Pathway	Incentive Claim	Complete/ Incentive Paid
PG&E	4	26	31	137	11	11	22
SCE	2	8	17	60	7	7	37
SDG&E	2	3	2	22	6	3	13
Liberty Utilities	0	0	0	2	0	0	0
PacifiCorp	0	0	0	0	0	0	0
Total	**8**	**37**	**50**	**221**	**24**	**21**	**72**

Figure 9 – Percentage of Active Applications by Milestone and Territory
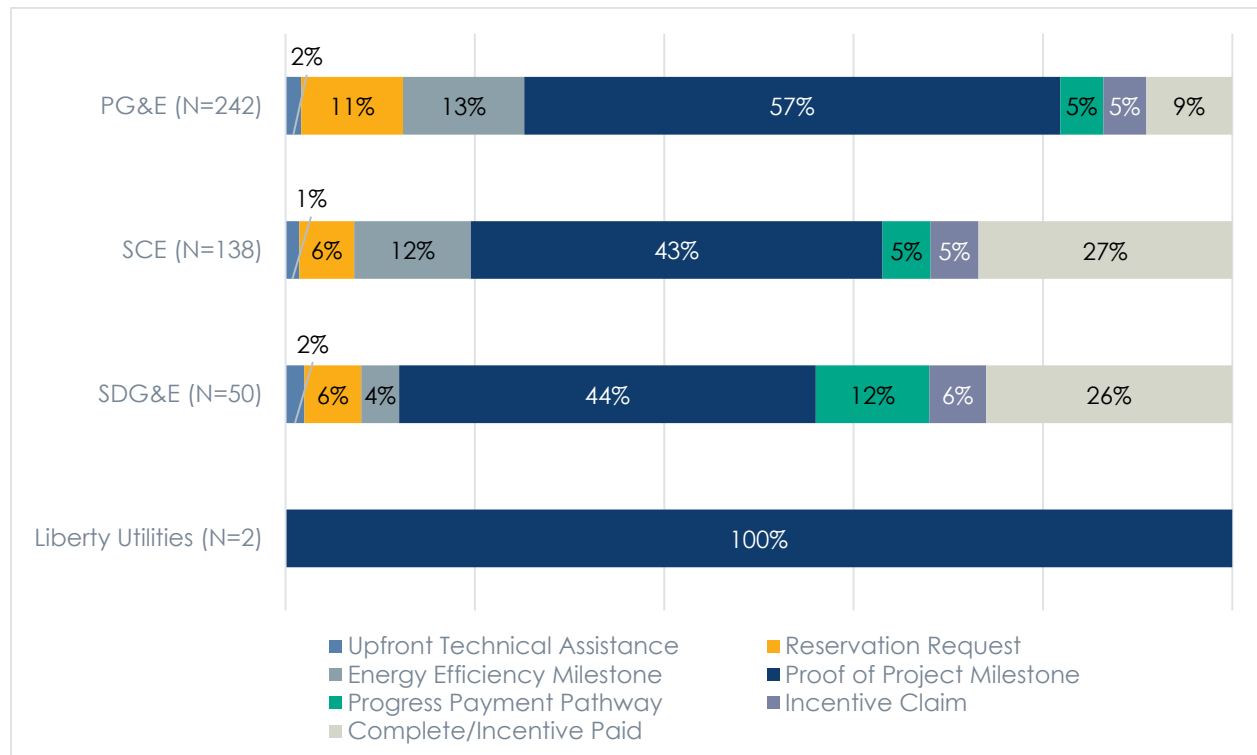
N=432

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

The slowdown of new application submissions in 2022 was balanced by a significant uptick in project completion with an increase in both the optional progress payment and project closeout activity through incentive claims throughout 2022. Additionally, the spike of projects submitted in late 2021 continued their journey through subsequent application milestones in 2022. The project progress in 2022 has been significant for program goals with completed projects and useful for program data collection at the later Proof of Project and Incentive Claim Milestones. This timing and increased activity for completed projects is particularly helpful to support the next triannual third-party evaluation. With more completed project data and activities across all milestones of the program, the SOMAH PA can support the evaluator with more robust data collection for the upcoming evaluation. This program progress also aligns with application progression trends, as 86% of all active and completed projects have reached or surpassed the Proof of Project Milestone (PPM). PPM indicates contract execution and construction will start shortly after if they have not already broken ground by PPM submission. This figure has increased notably from the close of 2021 when only 62% of projects had reached or surpassed PPM.

Of the new application activity in 2022, 11 Track A applications were submitted to the program. Of these applications, three projects have received Track A approval, three are in suspended status awaiting further documentation and five have been canceled. Of the five canceled applications, one project's regulatory documentation did not meet SOMAH's compliance period requirement by having less than 10 years remaining on their qualified project period, three projects did not have regulatory documentation for their properties and one project was master metered and therefore did not meet the program's eligibility requirements. Of the Track A projects submitted in Q4 2021, two are currently in Upfront Technical Assistance Approved status. The lengthier review process for Track A projects can be attributed to the additional support that property owners require during the SOMAH application process as they familiarize themselves with the program requirements, platforms, etc. SOMAH's technical assistance and affordable housing specialists ensure property owners receive guidance through every part of the Track A application process. More information can be found in Section 3.4, Technical Assistance.

Figure 10 – Applications by Incentive Track

Assigned Incentive Track	Active	Complete/ Incentive Paid	Canceled/ Withdrawn
Track A	11	0	34
Track B	349	72	253

N = 719

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

- Qualification Option A: 80% of property residents have incomes at or below 60% of the area median income as determined by the Department of Housing and Community Development.
- Qualification Option B: The property is located in a disadvantaged community (DAC) as identified by the California Environmental Protection Agency.
- Both: The property meets the requirement of 80% of property residents having incomes at or below 60% of the area median income and is located in a DAC.

Figure 11 shows the breakdown between application track and eligibility pathways during this period of performance.

Figure 11 – Property Eligibility by Incentive Track[5]
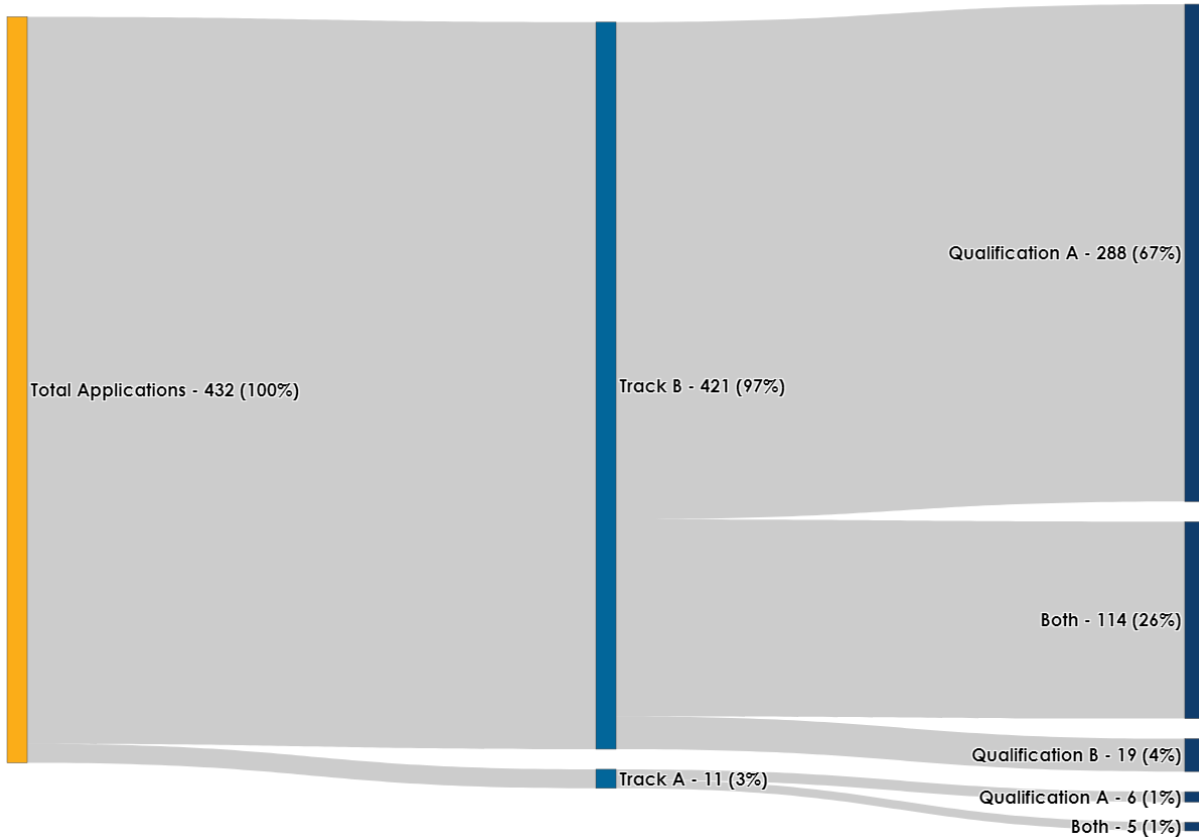
Of the 432 applications[6] received, approximately 67% qualified for the program through Qualification Option A, approximately 4% qualified for the program through Qualification Option B, and approximately 26% qualified for the program through both options. In the first two years of the program, participation of DAC projects fluctuated between 25-30% of SOMAH projects. At the close of 2021, the percentage of applications located in DACs had increased to 34% and has since decreased slightly with now 30% of applications at the close of the 2022 reporting period. At the end of

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

2020, the SOMAH PA provided the Commissioner's Office a memo[7] with potential options for increasing participation by eligible properties located in DACs and conducted stakeholder outreach in 2021 to determine the best path forward. Combined with ME&O strategy and programmatic efforts to prioritize projects located in DACs, the SOMAH PA also included DAC benchmark language in the SOMAH Program Handbook 5.0 that was approved by the CPUC in late April 2022. "In an effort to prioritize and increase participation in DACs, the SOMAH PA has set a programmatic benchmark or target of 40% of all participating SOMAH projects to be located in DACs by 2026. The SOMAH PA acknowledges that this will take the support of program partners and stakeholders and may require new strategies and potential program changes to ensure the program can meet this target," Handbook 5.0, Section 1.1.3, SOMAH Program Goals.

Figure 12 further breaks down the property eligibility statuses by count and percentage to highlight the number of DAC-qualifying properties.[8] The SOMAH PA continues to consider the different ways in which the program can increase participation for DAC-qualifying properties and will continue ongoing work on this effort to meet the benchmark and support overall program goals. Two impactful updates that support increasing DAC project participation in SOMAH are: 1) the Handbook 5.0 update to uphold eligibility for otherwise eligible properties within both the current and immediately previous version of the CalEnviroScreen (CES); and 2) the inclusion of federally recognized tribal lands as part of the CES DAC designation. Both updates support additional potentially eligible properties to qualify for SOMAH through their DAC status for property eligibility. For more information on how the SOMAH PA is continuing efforts to eliminate barriers and increase participation, see Section 4.2, Program Design and Updates, that discusses the next evolution of the program handbook, as well as the Incentives PFM.

[7] The January 2021 Semiannual Progress Report includes a summary of the 2020 CPUC DAC Participation Memo.
[8] 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 12 – Property Eligibility by Reservation Status

Property Eligibility	Pending Reservation Approval	Reservation Approval Received	Complete/ Incentive Paid	Canceled/ Withdrawn
Option A – 80% of property residents have incomes at or below 60% of the area median income as determined by the Department of Housing and Community Development.	26	224	44	201
Both A and B	7	87	25	65
Option B – The property is located in a disadvantaged community as identified by the California Environmental Protection Agency.	2	14	3	20
Data not reported.[9]	0	0	0	1

N = 719

[9] "Data not reported" represents one canceled Track A project that did not submit verifiable property eligibility documentation prior to cancellation.

Figure 13 – Overall Property Eligibility
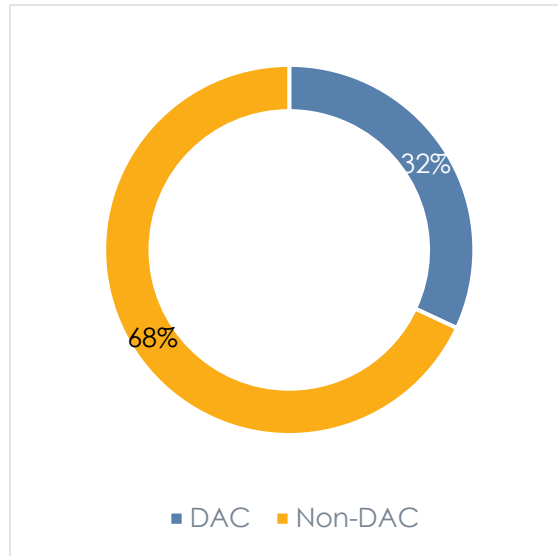
N=432

Figure 14 – Property Eligibility by Reservation Status

N=718

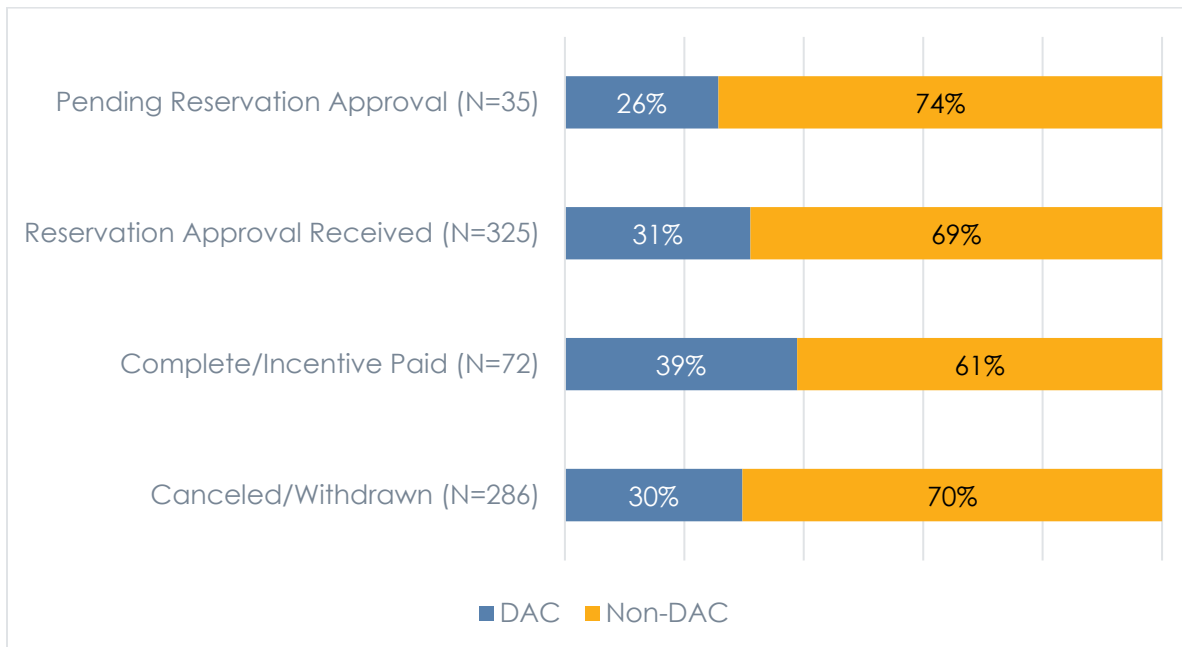Reservation request is the application entry point for Track B projects, the majority of SOMAH's application pipeline, and the second application step for Track A projects. The Reservation Request Package is a robust and distinguishable milestone for all projects to complete, including up to 10 required documents and an application deposit (for nonpriority groups) before achieving reservation approval. The three main components of the Reservation Request Milestone are: 1) the eligibility verification through review of the associated eligibility documentation; 2) IOU data request for consumption data and system sizing; and 3) the application deposit[10] before issuing a reservation approval. This approval is an important achievement for projects and for programmatic data and milestone tracking.

Application review timelines for newly submitted applications have decreased throughout 2022. The review time for the Reservation Request (RR) Milestone, from time of RR submittal to time of RR approval, fell to an average of 82 days for 2022 submission in total, and further decreased to an average of 42 days for projects submitted September 2022 through the end of the year. The SOMAH PA anticipates further efficiency increases in the average RR review timelines due to the following factors: the future phased RR milestone structure, cleaner initial application submittals due to the Affordability Prescreen service and increased applicant knowledge of the program, the application deposit waiver that eliminates a 30-day average invoice cycle,[11] and smoother historical usage data request processes.

The sustained efforts and focus on application review progress during this reporting period increased the number of reservation approvals[12] from 363 at the end of 2021 to 397 at the close of Q4 2022. Specifically, 25 of the applications pending reservation approval are very close to completing the RR Milestone and are currently either processing data requests or pending application deposit receipt before receiving final reservation approval. For applications that have passed the RR Milestone, the majority, 338 projects, have reached Proof of Project Milestone or have had their Proof of Milestone approved.

[10] Handbook 6.0 includes proposed language to waive the application deposit for all projects unless a waitlist is established.

[11] Application deposit waiver for priority groups (DAC and tribal projects) is included in Handbook 5.0.

[12] Reservation approvals for this reference include completed/incentive paid projects.

Not only is reservation approval a significant achievement for an application, but it also signals an important handoff of information between the SOMAH PA and IOUs. Based on mandates in the CPUC's D.17-12-022, the SOMAH PA sends monthly reports to the IOUs for Energy Savings Assistance Program (ESA) referrals of projects with reservation approval for each month, as well as a rolling list of all projects with approved reservations. These reports highlight an important part of data exchange between the SOMAH PA and IOUs, which encourages program benefits with "warm" ESA leads and valuable pipeline information for future interconnections from reservation approvals. The outcome of the monthly reported ESA leads is collected annually in Q4, with returned data from the IOUs based on completed projects that have received SOMAH incentives. The first IOU data collection was completed in Q4 2021 with information on whether the SOMAH project leads materialized into an ESA Common Area Measures (CAM) or in-unit referrals. With the limited number of completed projects at the time of the request in 2021, the available data was limited but increased significantly this year with the 2022 Q4 ESA data request.

With the increase in completed projects to request information for, the SOMAH PA was able to collect reportable feedback from the annual ESA referral data request (Q4) from the IOUs with completed SOMAH projects. The annual ESA referral data request is a rolling list of completed projects. The IOU reporting will capture ongoing efforts of ESA CAM and in unit engagement for SOMAH projects. The summary below shows the available information on the number of projects shared in the PA's annual 2022 Q4 request to the IOUs and the level of engagement across each territory.

SCE:
- 32 projects referred, equating to 3,027 tenant units
- 6 projects enrolled in ESA CAM
- 284 units enrolled in ESA in-unit
- Measures installed include HVAC, smart thermostats, re-lamping, indoor fixtures, outdoor fixtures, refrigerators, weatherization

PG&E:
- 17 projects referred, equating to 1,231 tenant units
- 0 projects enrolled in ESA CAM
- 446 units enrolled in ESA in-unit
- Measures installed include weatherization and AC tune-up.

SDG&E:
- 10 projects referred, equating to 818 tenant units
- 0 projects enrolled in ESA CAM

- 23 units enrolled in ESA in-unit
- Measures installed include LED bulb replacements, re-lamping, smart strips, faucet aerators, in-home energy education and outreach & assessment.

Information on this referral collection and data reporting will continue to be shared as additional projects are completed and data is collected for reporting and analysis on an annual basis.

Figure 15 – System Ownership Type
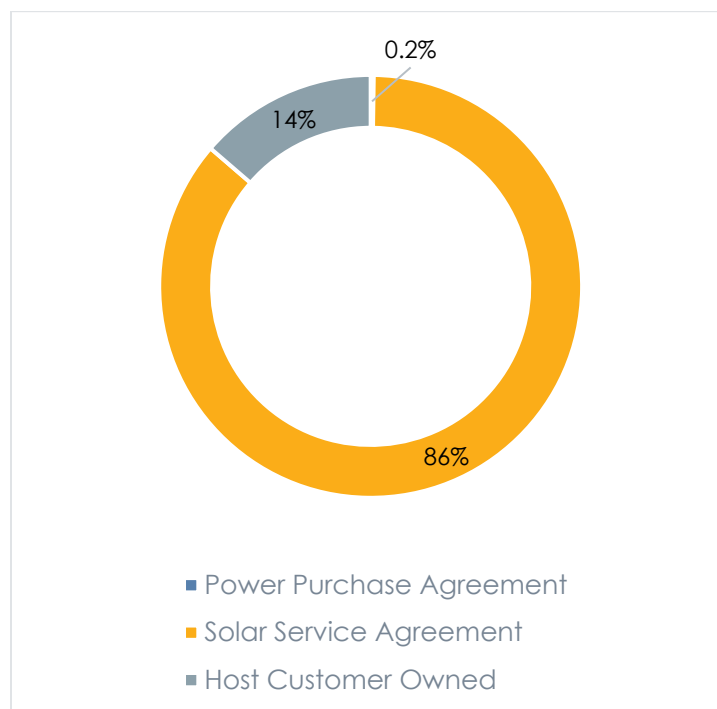
N=424

As Figure 15 shows, the majority of SOMAH projects, 86%, are third-party owned (TPO) systems. The largest share of TPO systems are solar service agreements (SSAs) similar to what some contractors term power purchase agreements (PPAs). With the Handbook 5.0 updates in the first half of 2022, the SOMAH PA began differentiating contract types between SSAs and PPAs to capture the most accurate information based on the solar PV contract. Data was reviewed for applications that have already passed the entry point in PowerClerk for this contract information and subsequent updates have been made to the application data in PowerClerk to align the PPA and SSA ownership types

with their applicable contracts. Feedback shared 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 the third-party ownership arrangement. Additionally, some contractor companies have preferred system financing/ownership options for their installations, which is a likely influence on the system ownership breakdown for the current application queue. The SOMAH PA has made efforts in 2022 to get additional PPA providers approved for the program, which will alleviate financial burdens, especially for small contractors. Additional information on PPA providers can be found in Section 3.2.3 Contractors.

Figure 16 – System Ownership Type by Property Eligibility
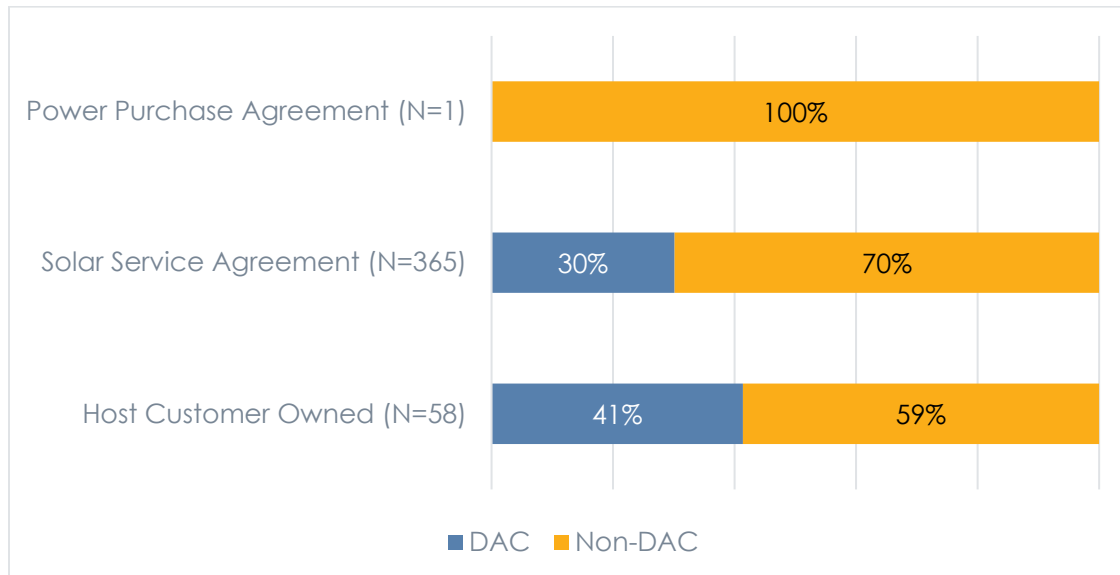
N=424

Figure 16 further segments system ownership types by DAC and non-DAC properties. The split of DAC and non-DAC projects shows a larger percentage of host customer-owned systems located in DACs as compared to TPO systems. Although different, the percentage of systems located in DACs, for both host customer-owned systems and SSAs, ranges from 30-41% by ownership type.

Completing application milestones is an important part of progressing applications and collection of project data for the program. In the seventh reporting period for SOMAH, the program has applications in all stages of the application, construction and

completion processes representing each of the program's four application milestones (plus the fifth optional milestone, Progress Payment Pathway). The Reservation Request and Energy Efficiency Compliance Milestones are important steps in determining project eligibility and the eligible system size, as they consider consumption history and available energy efficiency upgrades. Proof of Project and Incentive Claim Milestones provide information on the contracted and executed system as well as proof of compliance with the program's job training and tenant education requirements.

Figure 17 – Application Reservation Status by Incentive Track[13]

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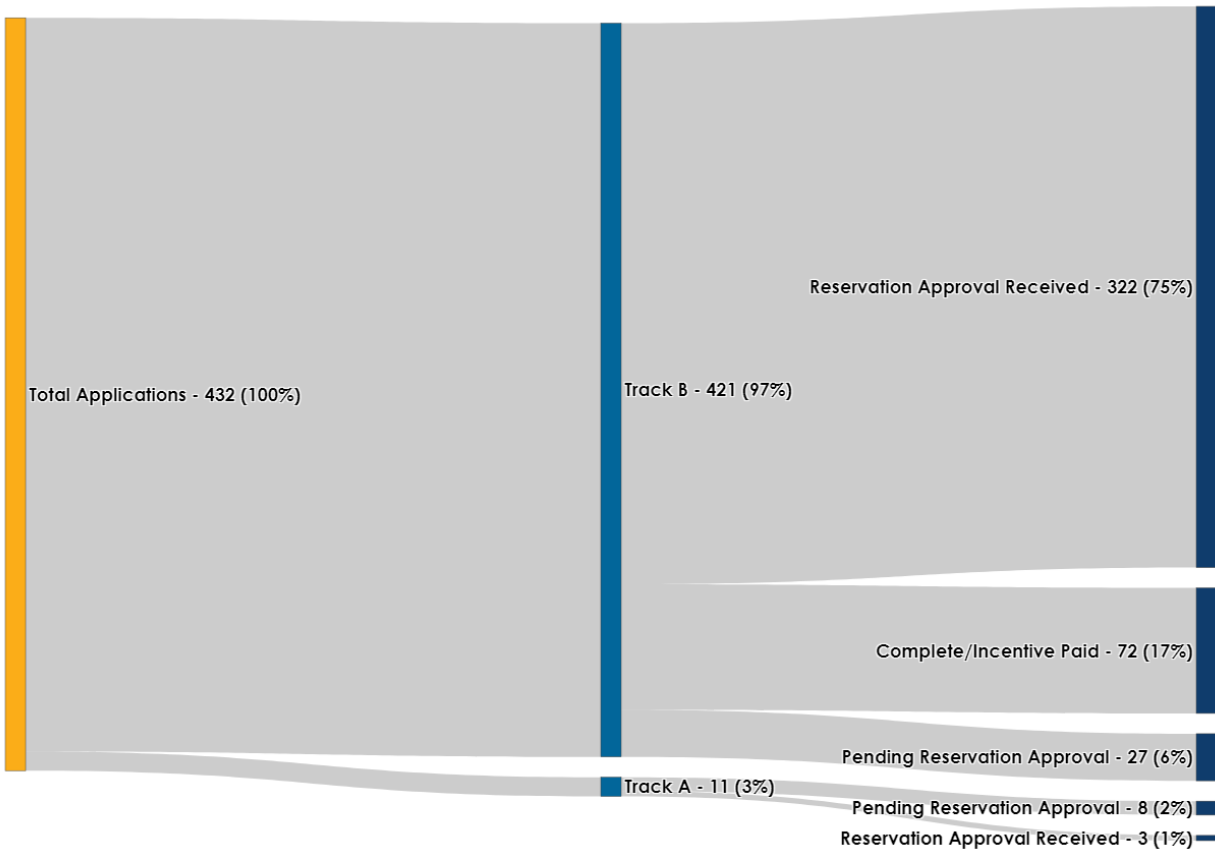
[13] Calculations used for this visual are subject to rounding and total percentage may not equal 100%.

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

The goal for the Energy Efficiency Compliance Milestone (EECM) is to assess the project site for energy efficiency opportunities, focusing on reducing site consumption before producing solar energy at the property. There are two pathways to fulfill the EECM requirement: Pathway 1 – energy efficiency whole-building walk-through audit and Pathway 2 – recent or active participation in an approved whole-building energy upgrade program, documentation of a recent California Tax Credit Allocation Committee (TCAC) rehabilitation or documentation that the property was completely constructed under a recent version of Title 24.

Pathway 1, whole-building walk-through audit, has posed some challenges during the COVID-19 health crisis for SOMAH participants. To accommodate these challenges with completing program requirements, the SOMAH PA introduced the EECM Postponement option in early July 2020 as a temporary program response, allowing projects that have received reservation approval to postpone submitting their EECM documentation up to submission of the Incentive Claim Milestone. At the Q2 2021 Public Forum, the SOMAH PA announced an end to the EECM Postponement option effective September 13, 2021, and continued to honor projects that are approved for EECM Postponement with no impacts to those project timelines. In total, 307 total projects enrolled in the EECM Postponement while it was available 2020-21. None of those active projects are currently in Energy Efficiency Compliance Milestone Postponement Approved status, as compared to the 44 projects at the end of 2021. As projects continue to progress to latter milestone statuses, and ultimately project completion, the postponed EECM documentation is submitted to and reconciled by the SOMAH PA.

As more projects progress to the later milestones, after EECM and ultimately completion, the SOMAH PA anticipates receiving more information about subcontractors being utilized by some projects. This past year, the PA observed a significant increase in reporting of subcontractor utilization overall. Additionally, the SOMAH PA conducted subcontractor interviews that provided further insights and information on the relationships between primary and subcontractors as well as their roles and overall engagement in the program. More information on the interviews can be found in Section 3.2.2, Monitoring, Evaluation and Research. The subcontractor information collected from the application process also helps to provide further insight into the diversity of contractors engaging in and benefiting from the SOMAH Program. Currently, two contractors are utilizing subcontractors on 21 different projects. In total, there are 11 separate subcontracting companies working in support of completing SOMAH projects.

In this reporting period, seven contractors have progressed a portion of their application portfolios to the Proof of Project Milestone (PPM), Progress Payment Pathway, Incentive Claim Milestone and project completion. The first completed project, PGE-SOMAH-101, finalized its incentive claim and final payment in Q4 2020. Throughout 2021, 13 additional projects in SCE, PG&E and SDG&E territories finalized their incentive claim and received their final incentive payments. By the close of 2022, an additional 57 projects were completed, totaling 71 completed projects throughout the program's lifetime.

At the close of 2022, 10 projects are currently working through the Incentive Claim Milestone. Of those incentive claim projects, four projects are in the inspection phase, five are currently undergoing review by the SOMAH PA, and one is pending IOU approval. Further information on completed projects will be available in future reports as applications continue to progress through their 18-month reservations and receive their incentive payment. The SOMAH PA is encouraged by the project completion movement that has occurred throughout 2022 and expects a continued high rate of project completion and incentive payment throughout 2023 as well.

Figure 18 – Average System Size (kW) by Reservation Status
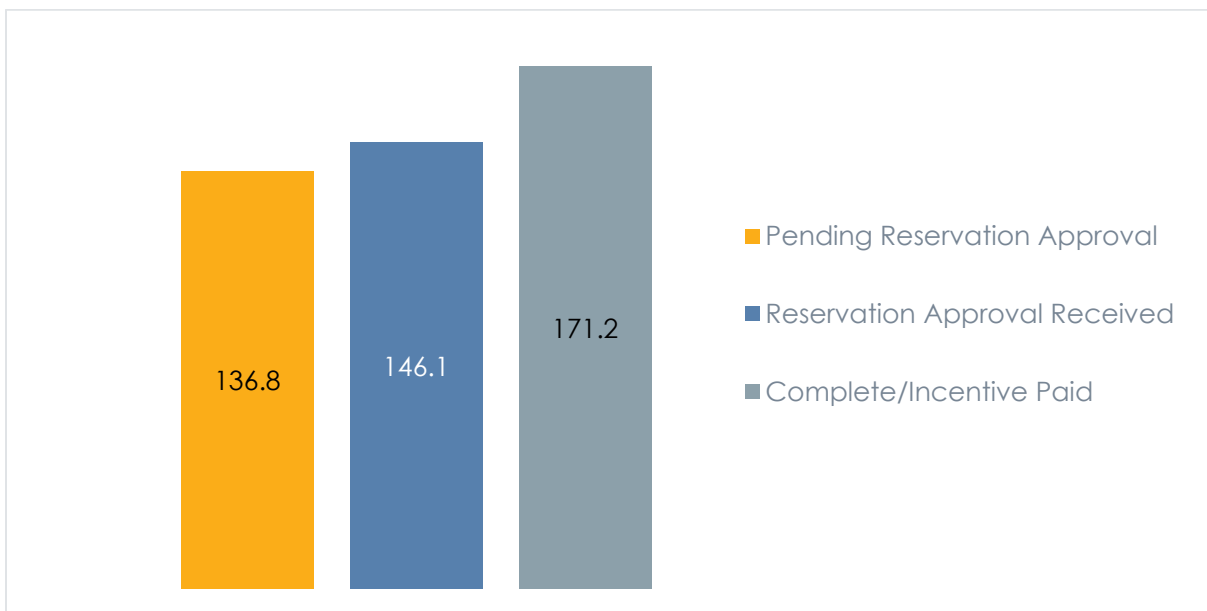
N = 424

Validating each project's system size with aggregated annual electrical consumption history from IOU data requests is a key step of the reservation request, prior to approval. The historic electrical consumption directly influences the system's final sizing. Figures 18, 19 and 20 outline system size statistics for the average and largest projects across the IOU territories.

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

Program	Pending Reservation Approval	Reservation Approval Received	Complete/ Incentive Paid	Canceled/ Withdrawn
PG&E	130.9	124.5	131.2	190.1
SCE	224.4	181.8	201.8	219.8
SDG&E	71.0	173.7	151.6	167.9
Liberty Utilities	0.0	74.2	0.0	0.0
PacifiCorp	0.0	0.0	0.0	111.6

N = 678

Figure 20 – Distribution of System Sizes (kW)
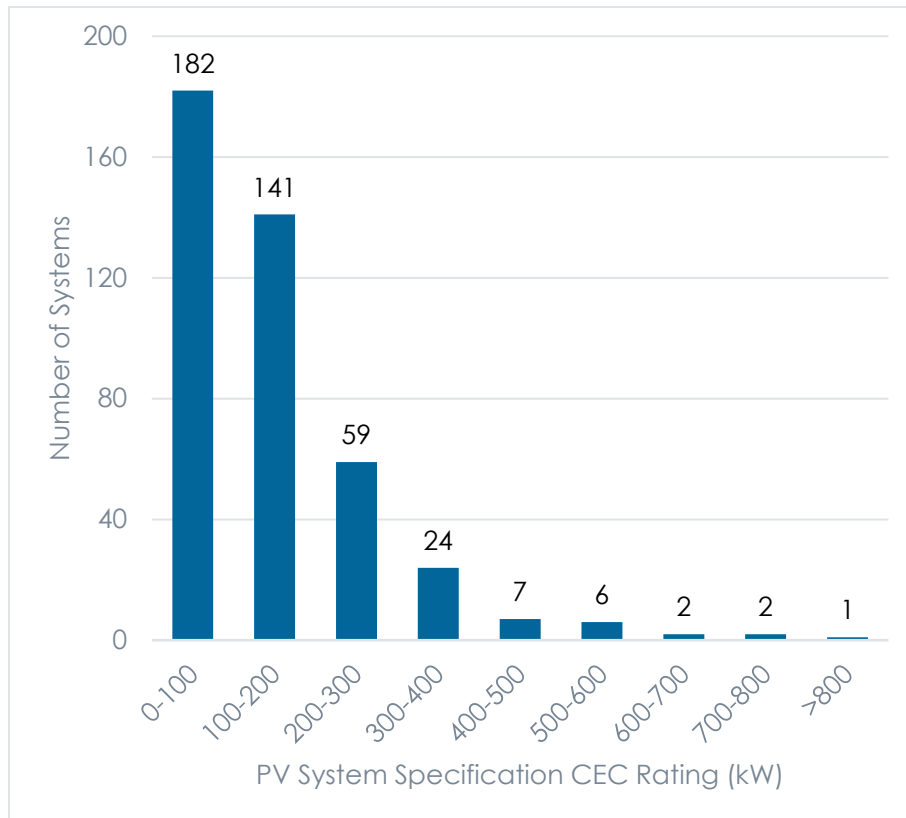
N = 424

From the projects with approved reservations, application data from PowerClerk shows that projects reduce their system size by an average of 30.57% from initial submission. The trend to reduce the system size after IOU consumption data sharing (post-reservation submittal and pre-reservation approval) continues. However, application data from PowerClerk also shows that newer projects (submitted later in 2021 throughout 2022) are trending with smaller adjustments overall. The SOMAH PA attributes this shift to contractors' evolving experience with the program and availability to assess the project sites and solar potential prior to submitting the incentive application. While using standard measurements assumptions like kW/square foot can be a helpful starting point, this trend shows that contractors are using all resources available and taking a real-world approach to system sizing as projects are developed and compared with site consumption history by the SOMAH PA.

SOMAH

Figure 21 – Progress to 300 MW

Active and complete applications make up **21%** of total program MW goals

63.5 MWs

Overall MWs
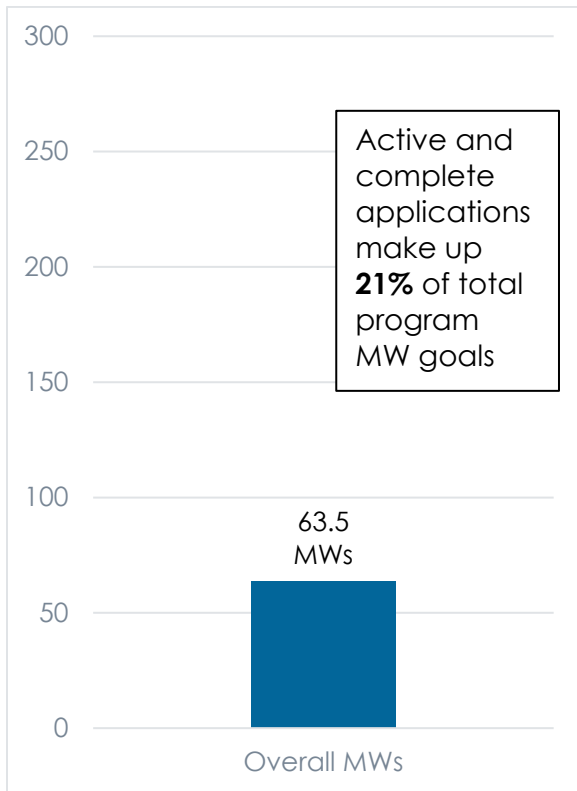
N = 424

Figure 22 – Percent of Program MW by Reservation Type

- Pending Reservation Approval
- Reservation Approval Received
- Complete/Incentive Paid
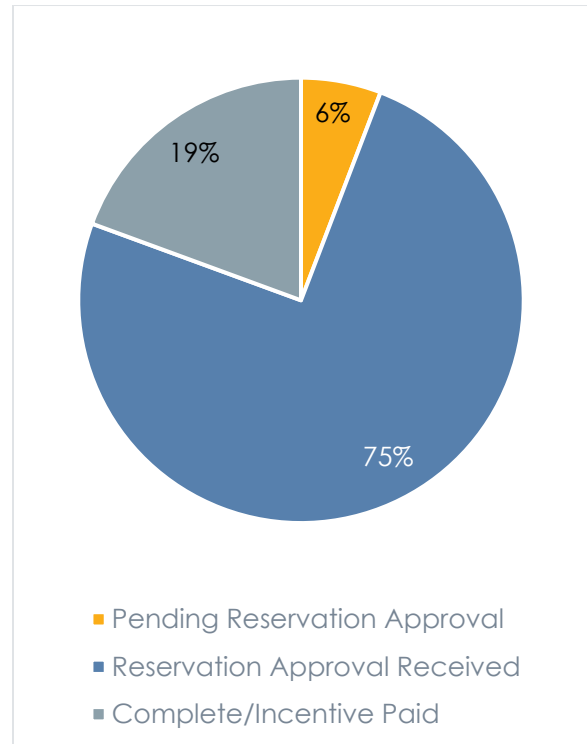
N = 424

Additionally, the average system cost is $3.98/watt CEC-AC [14] with a total expected aggregate annual output of 524,014,142 kWh[15] for the active SOMAH projects in queue.

[14] 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.

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

Completed projects increased from 3% of the application queue at the close of 2021 to 11% midyear, and subsequently 20% of the queue by the end of 2022, with the newly completed and paid projects in Q1 and Q2 2022. The percentage of pending reservation approval projects decreased from 32% at the end of 2021 to 6% at the end of 2022, partially attributed to the low volume of new applications received throughout the year.

Figures 23 and 24 show the geographic distribution of property locations for applications received to date and completed projects to date. For additional detail, a closer view is provided for areas of higher density project regions in the San Francisco Bay Area, San Diego and the greater Los Angeles area.

Figure 23 – Active Project Density and Location Visualizations
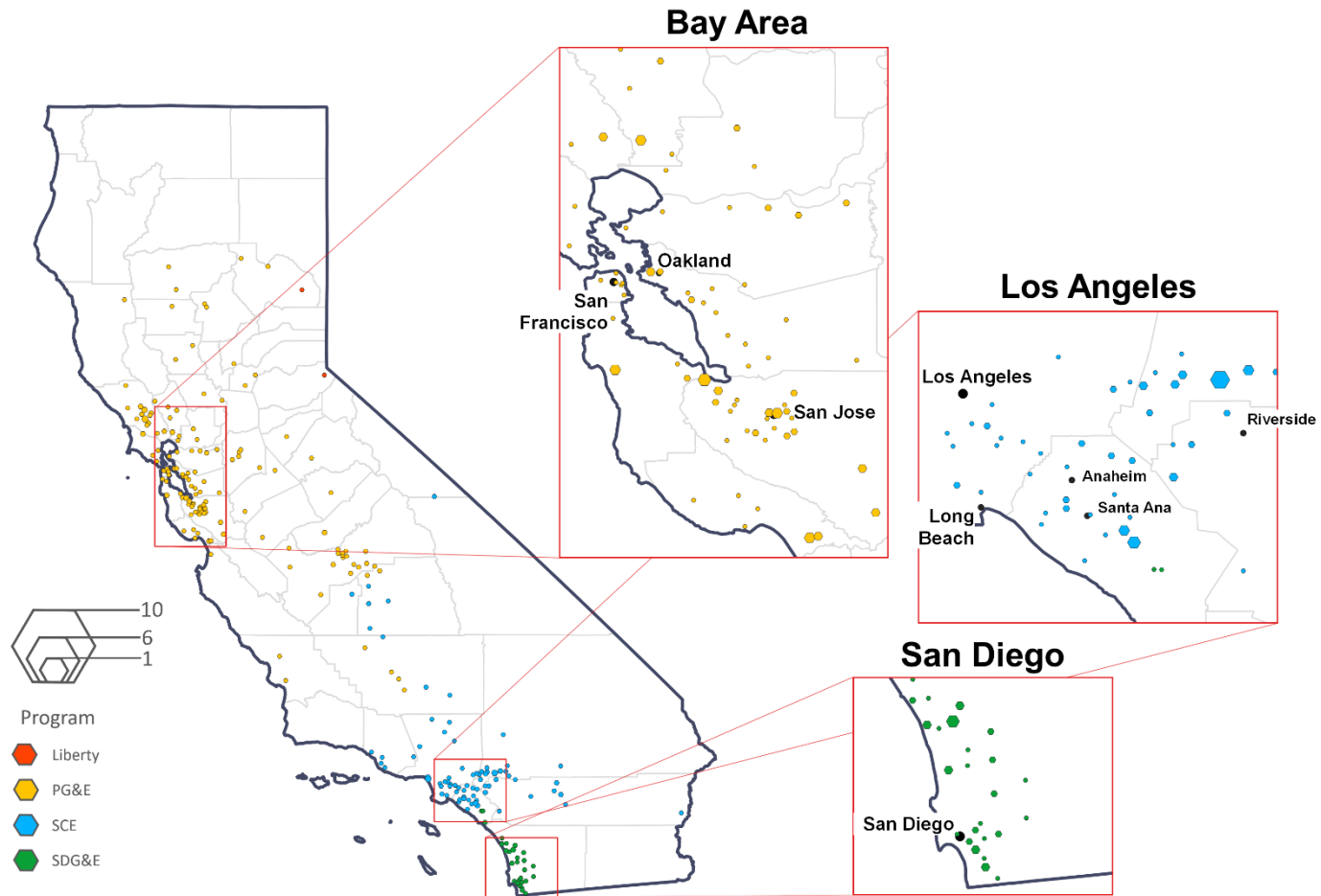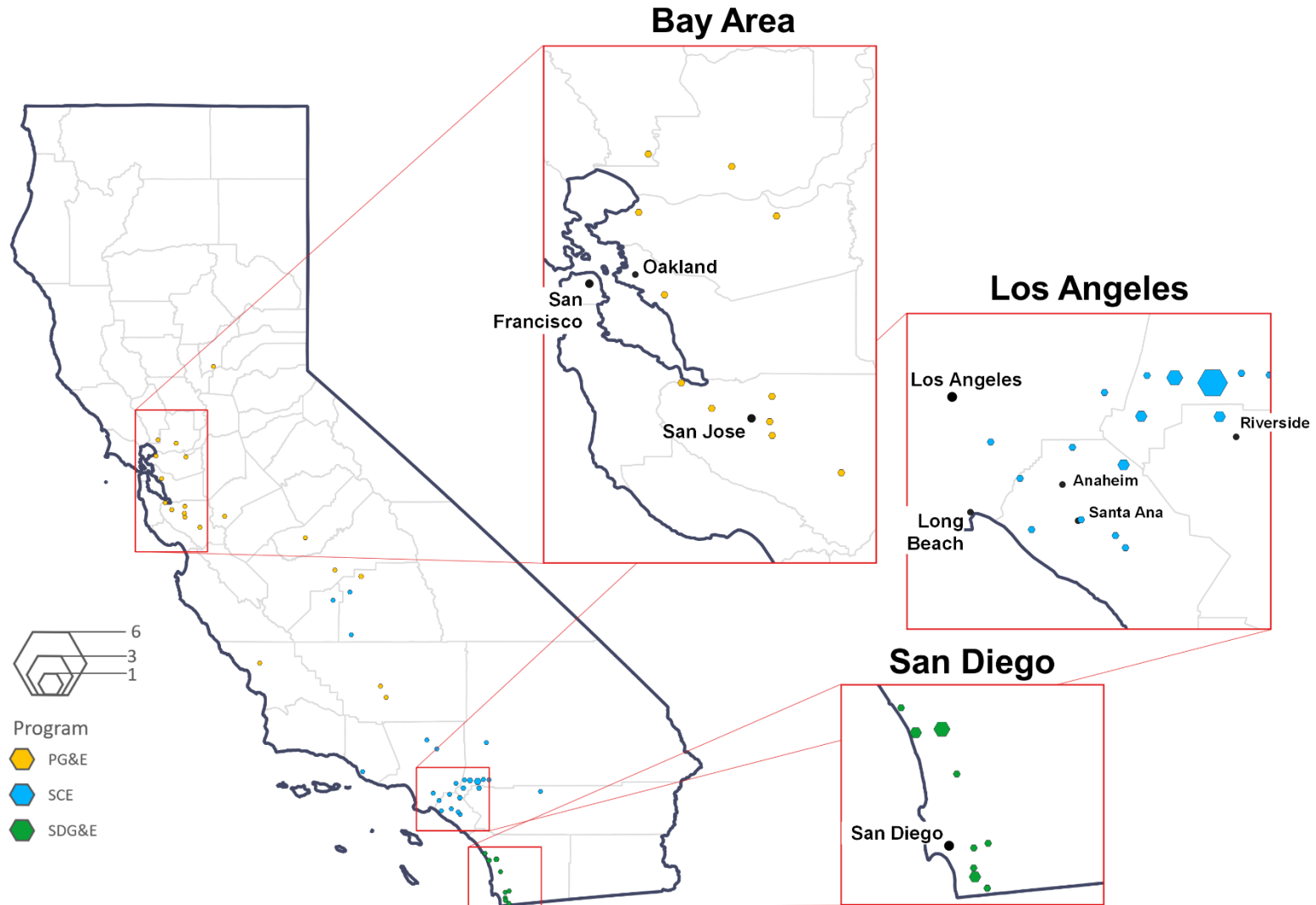
Figure 24 – Completed Project Density and Location Visualizations

3.1.2 Program Payments

The Progress Payment Pathway was designed to alleviate cash flow issues reported by participating contractors and helps dismantle barriers to increase contractor diversity. The development process of progress payments included PA consultation with program participants and stakeholders to develop the two-payment pathway for progress payments with Advice Letter 118-E submission on September 18, 2020. Energy Division then approved Advice Letter 118-E on December 21, 2020, and the SOMAH PA focused on preparation in Q1 2021 to launch progress payments in April 2021. Based on stakeholder feedback from public comments to Handbook 5.0, Advice Letter 133-E, the SOMAH PA amended the eligibility window for the minimum time requirement between progress payment and incentive claim from the prior four-month requirement to two months based on process flows and timelines in April 2022.

Depending on the application timeline and installation status, a project can participate with the standard, one-payment at the Incentive Claim Milestone or apply for a progress payment after completing the Proof of Project Milestone (PPM). A project is eligible for the Progress Payment Pathway after it has received a PPM approval and the system has been fully installed or mechanically complete. Mechanical completion is defined as the point at which all PV equipment has been installed, including the net generation output meter (NGOM) socket and the system wiring has been completed, but the authority having jurisdiction (AHJ) and local utility inspections have not yet taken place, and the system has not yet been granted permission to operate (PTO) from the utility. If a PV system has already been granted PTO, the project is not eligible for a progress payment. In addition, the incentive claim deadline can be no less than two months from the Progress Payments Pathway submission date. All projects requesting a progress payment are required to complete a live virtual walk-through (VWT) with the SOMAH PA to verify the system installation. The VWT consists of a video call, with the participant walking the SOMAH PA through the site to show the system components, including the installed PV modules, installed inverter and the project site address with the street number visible. After a completed VWT, 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 on-site 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 on-site inspection as a standard incentive payment. Upon launching progress payment offering, additional data fields were added to the working data set on the California

Distributed Generation Statistics website that indicates an approved opt-in to the Progress Payment Pathway and the resulting progress payment amount.

After launching the Progress Payment Pathway in April 2021, four progress payment requests (all SCE territory) were submitted by the end of Q2 2021. Nine more progress payment requests were submitted in Q3 and Q4 for a total of 13 progress payment participants at the end of 2021. There were a handful of progress payment requests trickling in during Q1 2022, followed by a rapid uptick in progress payment activity at the end of April with 14 new progress payment requests submitted in the span of one week and 11 more submitted in May. This spike in requests through April and May more than doubled the progress payment activity from the first eight months of 2021. A total of 13 new progress payment requests were submitted in Q3 and Q4 2022. Fourteen of the projects that enrolled in the Progress Payments Pathway have reached the Incentive Claim Milestone and have received their final incentive payment. The timeline for these projects shows that the progress payment offering allowed the participants to receive the benefit of a partial incentive payment, on average, seven months prior to their final incentive payment. This timeline supports the SOMAH PA's goal to alleviate financial barriers and support project viability.

The program expects ongoing progress payment activity for future reporting periods and is collecting feedback on the value and experience of progress payments through the Project Completion Survey that is deployed with final incentive payments. The response rate has been low for both the property owner and applicant responses to the Project Completion Survey, but the PA is planning further engagement efforts with participants to integrate this feedback sharing as a part of their closeout activities for future projects. Figure 25 outlines payment details for the program with a summary of the number of progress payments and standard payments issued and the applicable associated dollar amounts.

Figure 25 – Program Payment Statistics[16]

Program	Progress Payments Issued	Progress Payment Amount	Final Incentive Payments Issued	Final Incentive Payment Amount	Total Incentive Payment Amount
PG&E	25	$3,751,358	22	$4,743,060	$8,494,418
SCE	19	$5,137,559	37	$11,347,654	$16,485,212
SDG&E	14	$2,428,999	13	$3,580,131	$6,009,129
Liberty Utilities	0	$0	0	$0	$0
PacifiCorp	0	$0	0	$0	$0
Total	**58**	**$11,317,916**	**72**	**$19,670,844**	**$30,988,760**

In Q3 and Q4 2022, 13 new projects enrolled in the Progress Payment Pathway compared to the 32 projects from the first half of the year. Not all the reported 58 progress payment projects have completed installations and received final incentive payment as shown in Figure 25. There have been no instances of projects dropping out between the disbursement of progress payments and the completion of the incentive claim process. Future Semiannual Progress Reports will continue to include an update of program payment activity as highlighted in Figure 25, as well as analysis of payment timelines and progression details as additional projects are completed and paid.

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

[16] Progress Payments Total and Final Incentive Payments Total include some invoiced, pending payments.

3.1.3 Online Bidding Tool

The online bidding tool is a platform used to connect property owners with eligible SOMAH contractors, providing an apples-to-apples bid comparison. The platform is available for all SOMAH participants and supports the multiple bid requirement for Track A projects. The online bidding tool maintains a repository of eligible SOMAH contractors that have completed the Contractor Eligibility Training webinar and registered their primary contact information with the SOMAH PA. SOMAH contractors can use the online platform to gain access to job leads, respond to project bid requests and demonstrate program compliance.

The online bidding tool serves three distinct functions. First, it allows the host customer to indicate their interest in receiving a bid from three contractors of their choice. This encourages the customer to do basic research on a contractor ahead of time, such as researching reviews, and then gives them the opportunity to select their top three contractors. Then, after the customer's selection of bidders, the tool notifies the SOMAH-eligible contractors, who then contact the host customer to begin the process of building a site-specific proposal. Finally, once all three contractors have completed proposals, the tool aggregates basic information about the proposal into a single user interface, which allows the host customer to compare topline proposal information, including project cost, size, estimated date of completion and ownership type. The online bidding tool integrates with SOMAH's Project Bid Form, the eligible format to meet the multiple bid requirement. Whereas contractors have unique proposal generation tools and layouts with different underlying assumptions, SOMAH's requirement of a standardized bidding form harmonizes the detailed elements of a proposal into a consistent format containing objective and verifiable information. In this reporting period, the PA has worked to incorporate small but meaningful updates to the bidding tool intake form with helpful text, required fields and clarified field labeling in order to provide the best user experience and ease of use with the tool.

While there was no new activity with the bidding tool in the first half of 2022, one Track A project engaged with the bidding tool in late Q3 to early Q4. Even with two new Track A projects approved in 2022, the lower engagement volume of the bidding tool limits the amount of meaningful feedback and data available at this time. The SOMAH PA looks forward to reporting tool usage metrics and customer experience information in subsequent Semiannual Progress Reports when more data is available in aggregate.

3.1.4 Eligible SOMAH Properties Map

Figure 26 provides an overview of the Eligible SOMAH Properties Map. A refreshed user interface was developed in Q2 2022 to include new features to make the map even

more user friendly and streamline the access and navigation of key features and data points. The map webpage received over 1,145 page views in Q3 and Q4 2022. This update release was underway in Q4 with additional updates to the map data, including incorporating CalEnviroScreen 4.0 properties.

Map data is based on data from the California Housing Partnership's Preservation Clearinghouse. It is designed for use by SOMAH participants and stakeholders, especially solar contractors. The SOMAH PA intends to update the underlying map data for potentially eligible SOMAH properties on an annual basis in the second half of the year. This year's update is slated for release in January 2023 due to additional data screening and scrubbing for CalEnviroScreen 3.0/4.0 properties and evolving eligibility criteria at properties reviewed. The interactive visuals show multifamily affordable housing as well as current SOMAH applications, allowing users to filter by street address, ZIP code, main SOMAH eligibility requirements, legislative districts, utility territories and SOMAH applications. The map provides color coding based on a property's location in CalEnviroScreen defined disadvantaged communities, utility territories, legislative districts and climate zone.

Figure 26 – Eligible SOMAH Properties Map

Property Locations and Disadvantaged Communities

Click on the "▶" button above for more map interaction options.

© 2022 Mapbox © OpenStreetMap
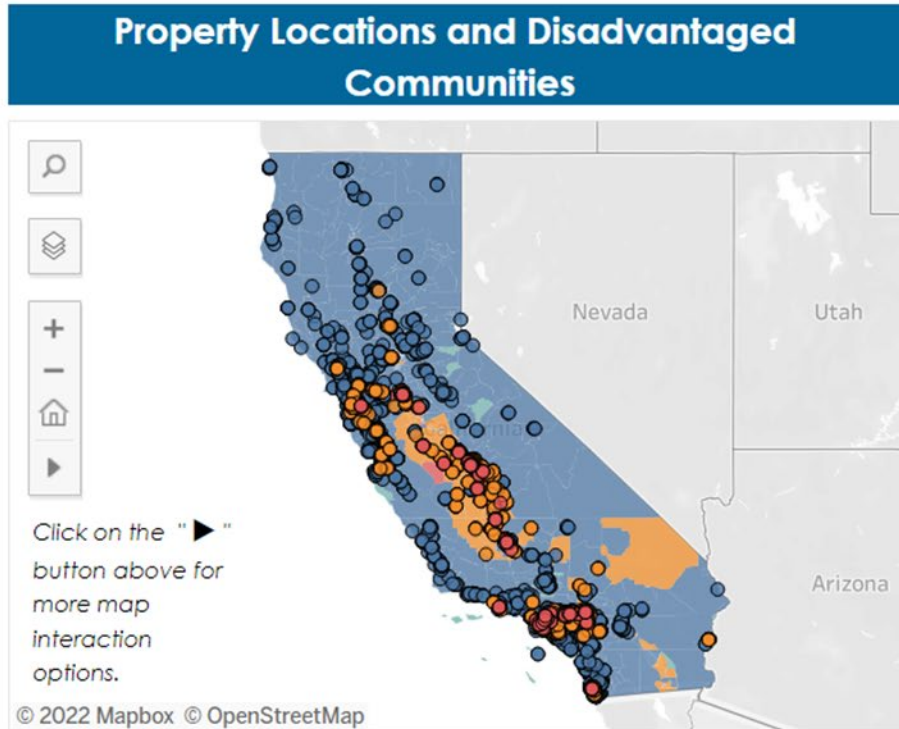
The **[5] Property Locations by [1] Disadvantaged Community** map displays the location of properties eligible for the SOMAH program. The color shows details about Disadvantaged Community (DAC) Census Tracts, which are defined based on CalEnviroScreen 3.0 criteria.

Communities

- Top 5% (Most Disadvantaged)
- 75-95% (Disadvantaged)
- Bottom 75% (Least Disadvantaged)
- No percentile available

Affordable Housing Units by Disadvantaged Community

Category	Units
Top 5% (Most Disadvantaged)	19,593
75-95% (Disadvantaged)	71,266
Bottom 75% (Least Disadvantaged)	173,042
No percentile available	1,029
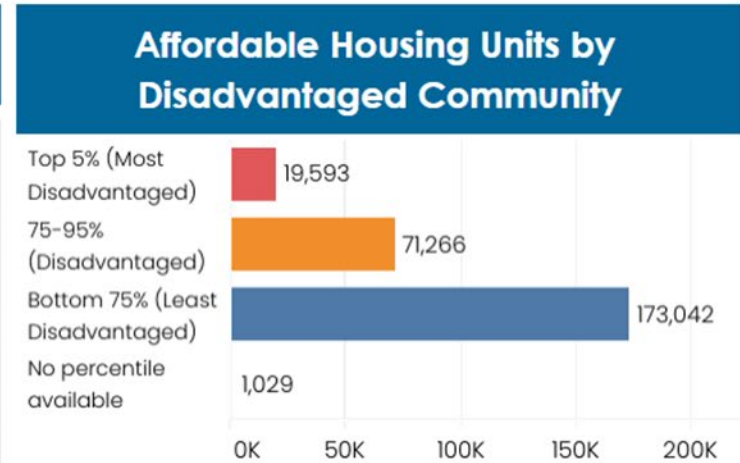
This chart shows the number of affordable housing units by disadvantaged community status.

Percent of Total Based on Filter Criteria

65.32%   26.90%
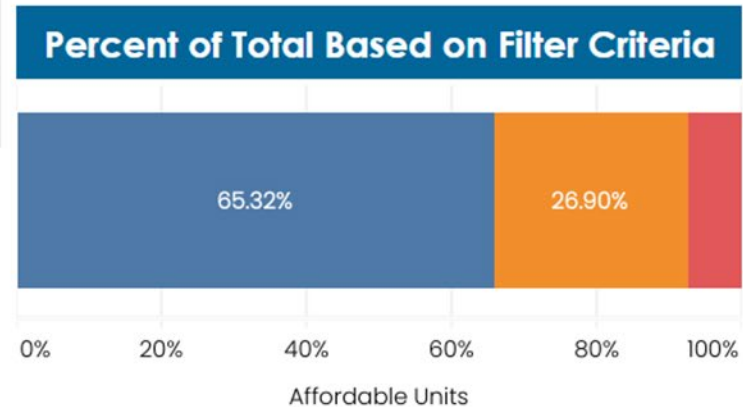
Affordable Units

This chart shows the percentage of affordable housing units by disadvantaged community status. The chart is sorted from largest percentage to smallest percentage.

3.1.5 California Distributed Generation Statistics

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

The working data set continues to be a frequented resource for program stakeholders and participants to glean insights on program progress and trends. Program data from the working data set also populates data visualizations on the SOMAH Statistics and Chart 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 populate with valuable data highlighting the noteworthy impacts of completed SOMAH projects. In June 2022, additional filtering features were deployed to the SOMAH charts and graphs page for dynamic viewing of key visuals across the participating territories and applicable data types.

In the second reporting period of 2022, the filters were fine tuned to address rounding and accurate reporting for program statics across territory and milestone categories. In Q4, a new field, "Application Submission Date", was added to the working dataset to provide additional data clarity on the entry point for Track A and Track B projects. This is in addition to the current status date that is also included in the working data set. Two column headers were also revised with additional labels and unit clarification along with revisions to the Read Me data key around the displayed information for reporting on array and inverter/module information. Section 4, Program Planning and Development, further elaborates on additional public reporting and transparency measures of the SOMAH Program.

3.2 Marketing, Education and Outreach

As the SOMAH Program increases the number of completed projects, the PA's audience engagement has emphasized storytelling through success stories, blogs and social media posts. Activities have included planning ribbon-cuttings, resuming in-person events and redesigning and launching a new SOMAH website with a new application flow and new resources and tools. The program celebrated many successes during this reporting period, as outlined by each audience type below. ME&O efforts were guided by the PA's 2022 ME&O Plan and focused on: 1) property owner outreach and growing the property owner pipeline, including the newly DAC-designated federal tribal land properties; 2) efforts to increase contractor and subcontractor diversity; 3) increasing in-person tenant education workshops; 4) showcasing job trainee solar career success stories; and 5) increasing stakeholder outreach.

3.2.1 ME&O Plan

SOMAH's annual Marketing, Education and Outreach Plan (ME&O Plan) guides the program's marketing, education and outreach activities, setting goals, objectives and tactics to reach SOMAH's priority audiences and supporting the overall program goals for 2022. Ultimately, the ME&O Plan uses outreach tactics to increase application submissions (Goals 1, 2 and 5) and to spread equitable sustainability for low-income and underserved communities (Goals 3 and 4).

The 2022 ME&O Plan was finalized in February after a public comment process. The 2022 ME&O Plan used Phase II evaluation recommendations, SOMAH internal surveys and focus group evaluations to help address outreach gaps per audience. SOMAH's 2022 ME&O Plan is centered on the same five goals as listed in the 2021 plan.

SOMAH's 2022 ME&O Goals

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

Goal 2: Continue building a robust and diverse contractor base and support eligible contractor retention.

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

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

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

The SOMAH PA is currently working on the 2023 ME&O Plan that will be finalized by February 2023 after a public comment period. Though the 2023 ME&O Plan's primary goals will remain the same, outreach strategies are continuously refined where successful outreach approaches lead to higher engagement.

3.2.2 Monitoring, Evaluation and Research

Central to the SOMAH ME&O strategy is monitoring and evaluating the SOMAH PA's efforts. The PA uses mixed methods to monitor and evaluate ME&O efforts, including surveys, qualitative interviews and program data analysis as well as reporting and transparency activities. The efforts are determined by the PA based on the program implementation plan, handbook, annual ME&O plans and other ongoing needs as determined.
The objectives of SOMAH Program participants research are:

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

Surveys are issued to all SOMAH audiences at different stages in the process, from ME&O efforts, through the application, to post-application. Feedback from surveys of SOMAH key audiences will be used to inform ongoing ME&O outreach efforts and the application process. The PA anticipates reporting on these surveys in Q3 2023, pending adequate project completion and survey response rates (i.e., the ability to report on surveys depends on when the PA receives statistically significant data for each survey). See Figure 27 for a summary of planned and completed surveys. Some surveys previously reported on have been removed.

In addition to surveys, the SOMAH PA began conducting future-focused research. This research is designed to: 1) identify opportunities to increase diverse contractor participation in SOMAH as prime or subcontractors; 2) spot opportunities to increase overall property owner participation in SOMAH; and 3) evaluate program retention. These research projects are outlined.

Surveys

Several surveys to key audiences are ongoing. To date, responses for project completion surveys have not reached a statistically significant number of responses. The SOMAH PA is making a coordinated effort to boost response rates for these surveys. Statistically significant numbers for these surveys are expected by Q3 2023 and should yield actionable insights into the program experience of contractors and property owners.

Figure 27 – Number of 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
Applicants	Project Completion Survey: Applicant	Deployed with final incentive payments.	Launched Q3 2021	Ongoing post-incentive claim
Property Owners	Project Completion Survey: Property Owner (non-applicant)	After incentive claim approval	Launched Q2 2022	Ongoing post-incentive claim
Property Owners	Property Owner Survey – No Application – In listserv	In SOMAH email listserv, no application	Launched Q3 2020	Annually*
Property owners	Property Owner Survey – No Application – Not in listserv	Before joining SOMAH email listserv	Launched Q3 2020	Ongoing
Property Owners	Technical Assistance (TA)	Post-TA, pre-Reservation Request	Launched Q4 2021	Ongoing post-TA
Tenants	Tenant Education	Post-project installation	Launched Q1 2022	Ongoing post-install
Job Trainees	Job Trainee Experience Survey	Post-project installation	Q1-Q2 2022	Ongoing post-install

* Paused in 2021 due to redundancy with third-party evaluator survey.

ME&O Program Research

SOMAH's research projects are outlined in Figure 28. During Q3 2021, the PA created a research plan to better understand the program's participants, audiences and successful projects. This plan is routinely updated as focus and priorities change. This plan encompasses a mixed methods approach that includes research to evaluate: 1) where and how property owners learn about SOMAH; 2) what motivates them to participate; and 3) what causes them to withdraw their applications. The research will continue into 2023 and be reported in future Semiannual Progress Reports.

Figure 28 – SOMAH 2021-22 Program Research

Project Descriptions	Research Objectives	Audience	Timeline
Contractor Focus Groups	• Understand barriers to contractor participation in SOMAH, especially small, minority-owned and women-owned businesses. • Identify solutions to encourage more contractor participation in SOMAH.	Non-participating solar contractors	Delivered Q1 2022
Property Owner Pipeline Analysis	• Understand notable gaps in pipeline development and applicant retention. • Identify what ME&O activities are likely to result in lead generation.	Participating property owners SOMAH PA	Q3 2022
Property Owner Focus Groups	• Gauge property owner interest in installing solar on their properties. • Understand solar installation priorities for property owners (including general operations as well as capital projects). • Identify structural barriers to participation. • Identify ways SOMAH can use its resources to support target audience participation.	Non-participating property owners	Q2-Q3 2022
Subcontractor Interviews	• Understand subcontractors' experiences in the SOMAH Program and what structures facilitated their participation.	Participating subcontractors	Q3-Q4 2022

	• Determine what aspects of their experience are replicable for like-sized contractors.		
Tenant Education Focus Groups	• Evaluate the effectiveness of SOMAH's tenant education materials. • Create engaging and effective materials for residents receiving solar through the SOMAH Program.	Participating SOMAH tenants	Q2 2022

Contractor Focus Groups

To better understand barriers to participating in SOMAH, the SOMAH PA organized focus groups with targeted eligible contractors (small businesses, minority/women-owned) who had not yet participated in the program. These focus groups were developed with the Transparency and Insights (T&I) team at the Center for Sustainable Energy. To provide anonymity to participants, the T&I team led these focus groups, handled all analysis and provided a summary report with recommendations to the SOMAH PA.

The SOMAH Program identified 62 solar contractors for focus group participation, engaging six participants, including one multifamily property developer. Focus groups were held virtually on July 13 and 14, 2021. Participants were primarily small contractors, as minority/women-owned contractors proved difficult to engage. Participants represented a wide range of service territories ranging from regional to statewide as well as experience with large-scale solar installations. Focus group participants identified several key themes that pose barriers to their participation in SOMAH. The key barriers identified were:

- Lack of clarity about SOMAH Program components.
- SOMAH Program requirement concerns.
- Small business challenges.
  - o Reliance on referrals.
  - o Lack of time to cultivate SOMAH-eligible projects.
  - o Multifamily not their core business.
  - o Competition.
- Business return on investment.

Key recommendations coming from these focus groups were to:

- Offer more opportunities for contractor engagement.

- Expand resources for contractors and marketing their availability.
- Consider creating a contractor engagement position(s).
- Provide additional workforce development support for small contractors to meet job trainee requirements.
- Support small contractors to participate as subcontractors.

Property Owner Pipeline Analysis

The purpose of this project was to provide a summary view of property owners' experience in the SOMAH Program from initial awareness to project completion. The following two data summaries were developed to summarize the ME&O property owner participation analysis from 2021:

- 2021 Property Owner Engagement Matrix
  - Summarized overall ME&O efforts and number of new property owners engaged in the program.
- Property Owner Participation Pipeline
  - Identifies the stages in the SOMAH project cycle where property owners were likely to cancel projects.

Key takeaways and recommendations from this research are below.

Key Takeaways	Recommendations
Currently available ME&O data does not allow for the determination of conversion rates.	Collect data on how property owners learned about SOMAH on both the program application and webinar registration forms (along with firmographic information to determine if attendees are property owners). This information will assist in measuring ME&O conversion rates and impact of contractor solicitation on property owner participation.
The impact of contractor solicitation on property owner participation is unknown because it is conducted outside of the SOMAH Program purview.	
Track A participants are more likely to cancel applications.	Conduct research to determine viable solutions to barriers Track A participants face in completing projects.
Property owner's chance of canceling applications drops precipitously after funding is reserved.	Target property owners going through the reservation request process for further

	research on what is leading to cancellation rate.

Further details on the methods, findings and considerations have been provided to the SOMAH PA in a draft report.

Subcontractor Interviews

The purpose of this research was to understand why prime contractors (primes) use subcontractors for SOMAH projects and how these two program stakeholders develop partnerships. We engaged program stakeholders in interviews designed to:

- Explore participating contractors' and subcontractors' experience in the SOMAH Program to understand what structures facilitated their relationship and participation.
- Determine what aspects of the contractor and subcontractor relationship and experience are replicable for like-sized contractors to scale up participation from both entities.

The SOMAH Program identified two prime contractors using 13 subcontractors for SOMAH projects. Interviews were held virtually with the prime contractors on May 19, 2022, and May 25, 2022, and subcontractor interviews were held virtually between May 20, 2022, and July 20, 2022. In total, two primes and five subcontractors were interviewed for this study.

Prime contractors stated their reasons for subcontracting were to support SOMAH's mission to diversify its contractor base, fill in gaps of crew experience and availability, expand their service regions, increase their pipeline of projects and maintain project costs. Primes and subcontractors connected with each other primarily through a prior connection or network referral before primes utilized the SOMAH-eligible contractor list and met subcontractors after the acceptance of a bid. The qualities that prime contractors look for in selecting subcontractors are, in the order of importance, their commercial building, prior installation and interconnection experience.

When working on a SOMAH project, each entity was responsible for specific roles. The prime contractors were typically in charge of making the project sale, handling the SOMAH Program application and designing the system and interconnection along with submitting the interconnection permit. Subcontractors typically took care of the installation with either or both entities in charge of procurement. Subcontractors' overall

experience working on SOMAH projects largely went as expected, although not always. This caused some concerns such as project delays, increased costs and getting paid on time. All subcontractors were interested in becoming primes in the SOMAH Program, but they face several challenges to stepping into that role. The key challenges to becoming a prime were identified as:

- Bandwidth to handle and manage the program application
- Ability to engineer the system and create and submit the interconnection design
- Lack of an operations team
- Lack of a sales team.

Based on the interview findings, the following topics for consideration were crafted to help support prime contractor and subcontractor engagement with the SOMAH Program. They are:

- Opportunities for networking
- Further vetting contractors
- Resources for program support.

Further details on the methods, findings and considerations from these interviews can be found below.
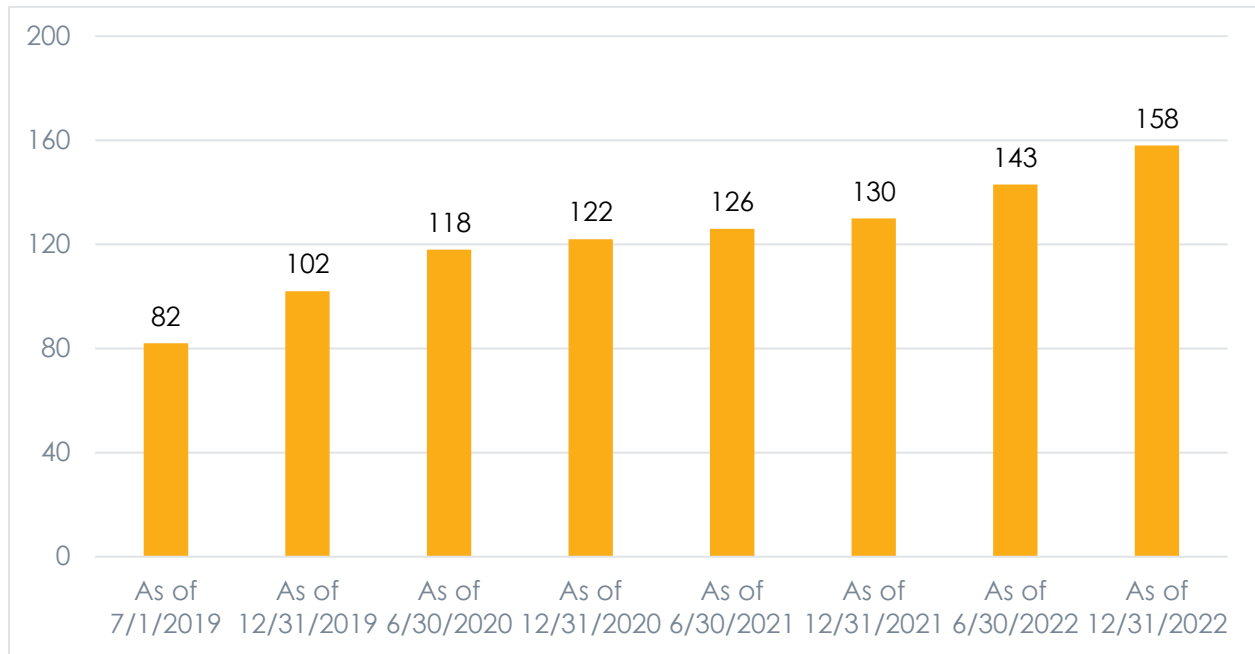
3.2.3 Contractors

The SOMAH PA engages with active SOMAH contractors through the Track B application pathway. Through this reporting period, the SOMAH PA continued to focus outreach efforts to contractors through digital channels and virtual events. As COVID-19 restrictions were lifted, SOMAH was able to attend more in-person events. For example, the SOMAH PA attended the RE+ Conference, a solar and renewable energy conference, in September 2022. The PA had a booth (shared in partnership with SCE) and participated in a job fair and two speaking opportunities, including a panel led by a SOMAH CBO member from the California Environmental Justice Alliance (CEJA).

The PA continues to engage contractors through ongoing bimonthly Applicant and Contractor Eligibility Trainings. Through this reporting period, eligibility training sessions were held in July, September and December 2022. The applicant and contractor trainings had a total of 41 attendees out of 107 registrants. Attendees included new contractor companies, new staff members for already eligible contractors and representatives from energy efficiency agencies. There was a collective marketing effort in promoting the eligibility training starting with several social media posts in SOMAH's Facebook, LinkedIn and Twitter. The September eligibility training had a paid
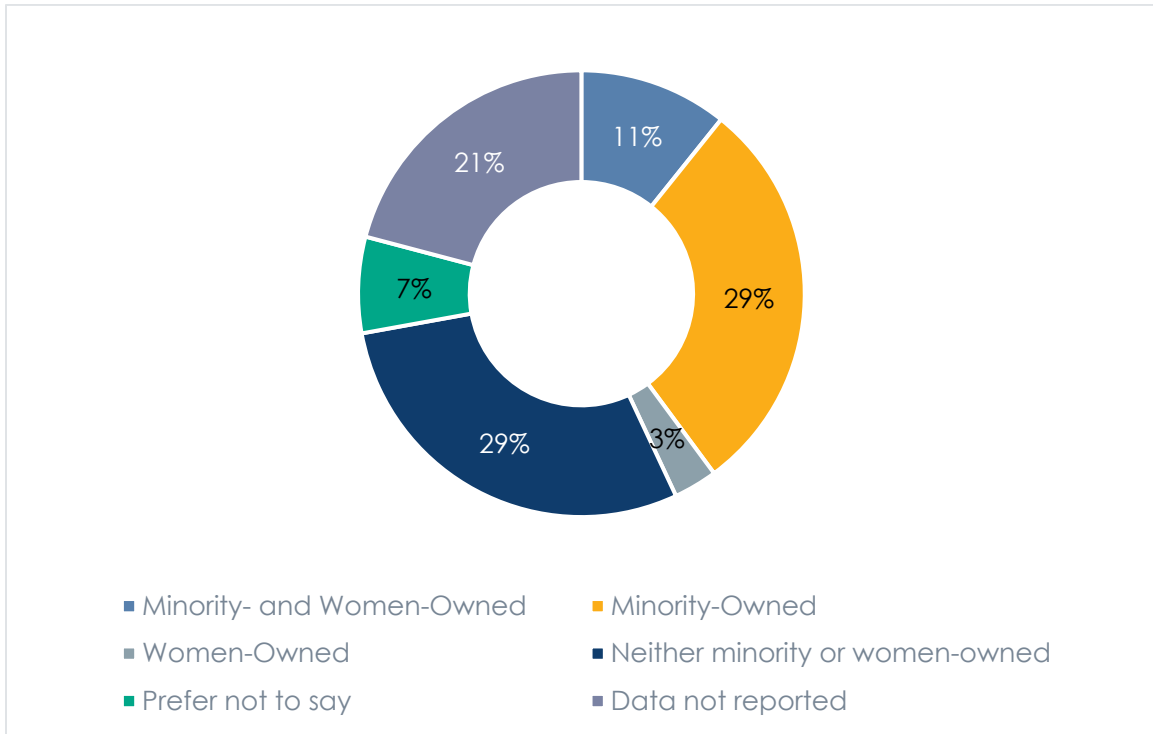
media campaign on SOMAH's social media channels as well as Google Ads. For the December eligibility training, SOMAH had a paid campaign through the San Francisco Bay View Black Newspaper social media channels and website ads. This reporting period saw the highest number of registrations and new contractor participation since the first year from program launch. Both the paid campaigns and RE+ Conference can be credited with the success in new contractors being added to the program. Beyond advertising, the SOMAH PA also conducted direct outreach to contractor companies via email and phone. At the close of 2022, there are a total of 158 SOMAH-eligible contractors, as shown in Figure 29.

Figure 29 – Number of Eligible Contractors Over Time

This reporting period, there were 11 new SOMAH-eligible contractors and one new subcontractor. The one subcontractor and nine out of the 11 contractors identified as minority owned. There was also diverse geographic participation, as registrants from Sebastopol, South Lake Tahoe, Central Valley to Descanso engaged with the program. Contractors headquartered in three IOUs' territories were represented in the Applicant & Contractor Eligibility Trainings, including SDG&E, SCE and PG&E territories.

Figure 30 – Eligible Contractor Statistics

Legend:
- Minority- and Women-Owned (11%)
- Minority-Owned (29%)
- Women-Owned (3%)
- Neither minority or women-owned (29%)
- Prefer not to say (7%)
- Data not reported (21%)

N = 158

SOMAH continues to strive to increase participation by diverse contractors, defined by SOMAH as minority, women and/or LGBTQIA+ owned companies, as well as small companies with less than 25 employees. As mentioned, most of the new contractors, plus the new subcontractor participating in the program are identified as minority-owned, which paired with an overall increase in diverse contractor participation in the program. Our efforts are moving in the right direction to encourage participation of contractors who reside across the state. As mentioned above, SOMAH worked on increasing minority-owned contractors by co-marketing with the San Francisco Bay View Black Newspaper.

Figure 31 – Active Contractor Diversity
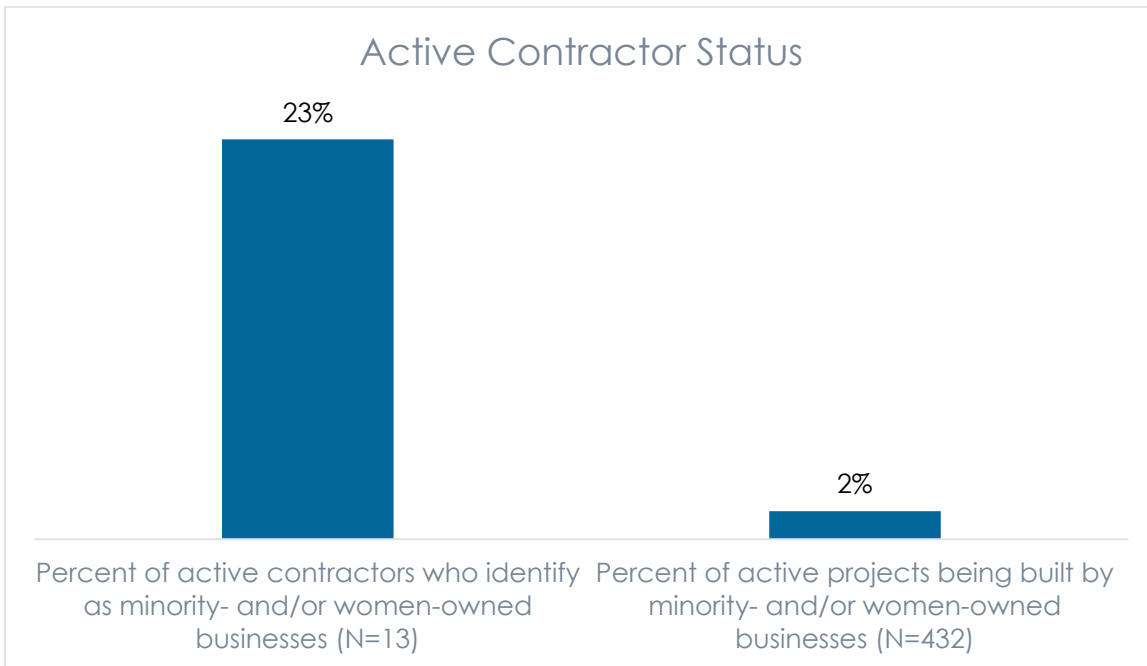
In 2022, the SOMAH PA saw an increase in interest from power purchase agreement (PPA) providers who would like to be paired with contractors and subcontractors working on SOMAH projects. Two PPA providers became SOMAH-approved in 2022, and additional outreach and meetings were held with other providers that could likely become eligible in 2023. This pairing will help with financial burdens and limitations with ownership options that smaller contractors have listed as a barrier to participating in SOMAH.

Subcontractor pairing with contractors with applications is ideal once an application has met Reservation Request Approval. This reporting period, we had most application submissions later in the year. Therefore, subcontractor pairing will be a bigger effort at the beginning of 2023 once new applications reach an approved status. The one subcontractor that started work on a SOMAH project in this reporting period is still considered a success as every new program participant is helping increase program diversity.

Figure 32 – Subcontractor Statistics
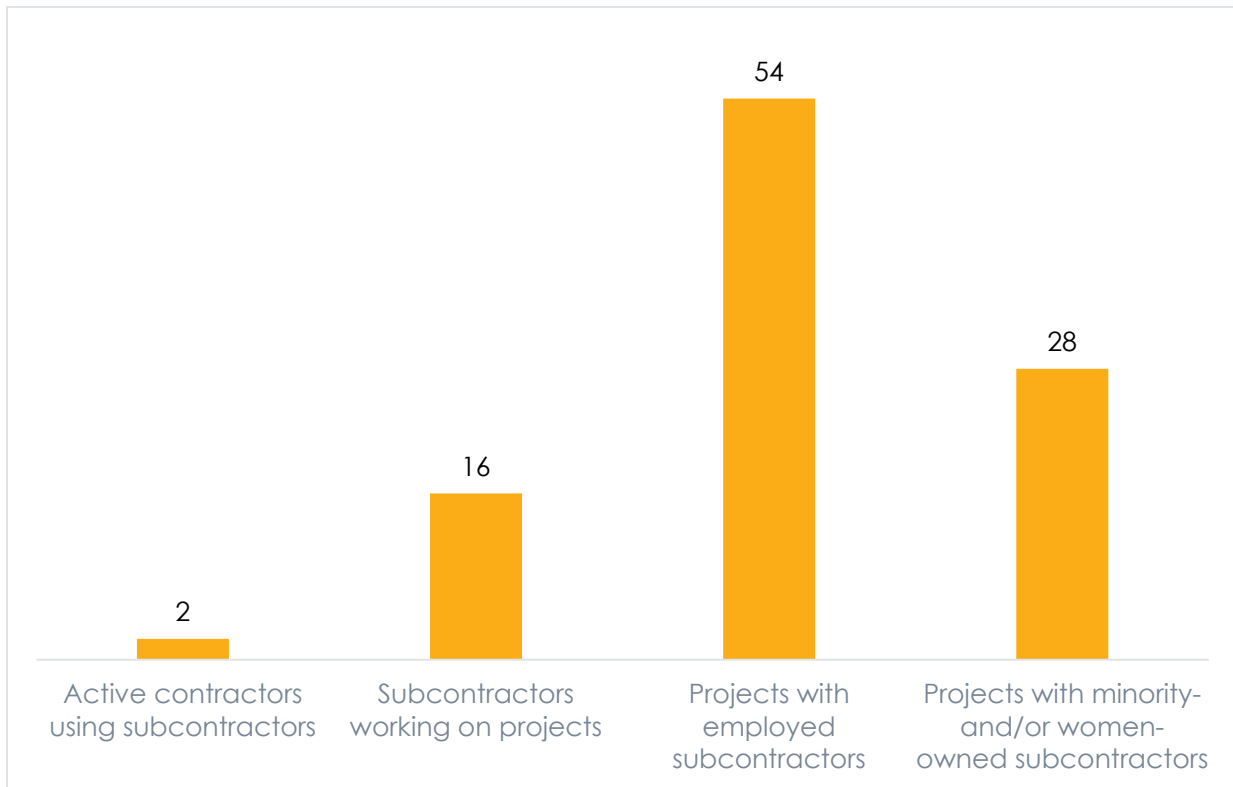
3.2.4 Property Owners

As COVID-19 restrictions were primarily lifted throughout the year, both an in-person and digital outreach approach was conducted with property owners. The SOMAH PA began attending in-person conferences and events in early 2022 and continued throughout the year. Primary channels of engagement were direct email outreach, email announcements through the CalSOMAH listserv, webinars, conferences, social media, paid media campaigns and video content.

Direct outreach

During this reporting period, direct emails were sent to 70 for-profit property management companies (PMCs) and 125 nonprofit PMCs, including 41 housing authorities and 10 tribal entities. These companies represent a large portion of the total amount of eligible properties, as a single PMC can have numerous properties in their

portfolio. Direct outreach emails were sent to invite property owners to events, offer portfolio reviews and make the initial introduction to the SOMAH Program.

One specific focus of direct outreach during this time was PacifiCorp and Liberty property owners. Outreach was done to 26 for-profit owners in these areas in Q4 2022, as there are significantly less applications and overall engagement in these geographic regions.

An additional outreach effort completed during this reporting period was building out the property owner contact base. The SOMAH PA has continued to utilize a database called RocketReach to obtain current contact information for PMCs, whereas this information may have been outdated or even nonexistent in some cases. Building out this contact database allows for outreach to be more impactful by casting a wider net.

Additionally, the PA's ME&O Salesforce database was expanded by obtaining conference attendee lists with contact information. The SOMAH PA attended the California Council for Affordable Housing Conference at the end of June and added 50+ contacts from top developers in California to the Salesforce database. This database maintenance and expansion is a key step in getting more engagement and interest in the SOMAH Program from property owners. The PA plans to request and utilize attendee lists at future conferences and events where possible.

DAC and Tribal Outreach

One of the SOMAH PA's goals is to increase participation among properties located in DACs. During this reporting period, property owner outreach in DACs accounted for 454 properties contacted out of the 1,762 total, as shown in Figure 33. Direct outreach efforts via Salesforce emails were able to specifically target PMCs with properties in DACs. Additionally, the SOMAH PA completed six interest calls with SOMAH-eligible property owners, providing a portfolio review, a brief overview of the SOMAH Program and a Q&A session to wrap up. Connecting with property owners will continue to be a focus in 2023, while continuing an emphasis on reaching out to owners in DACs.

Figure 33 – Properties Contacted by DAC Status
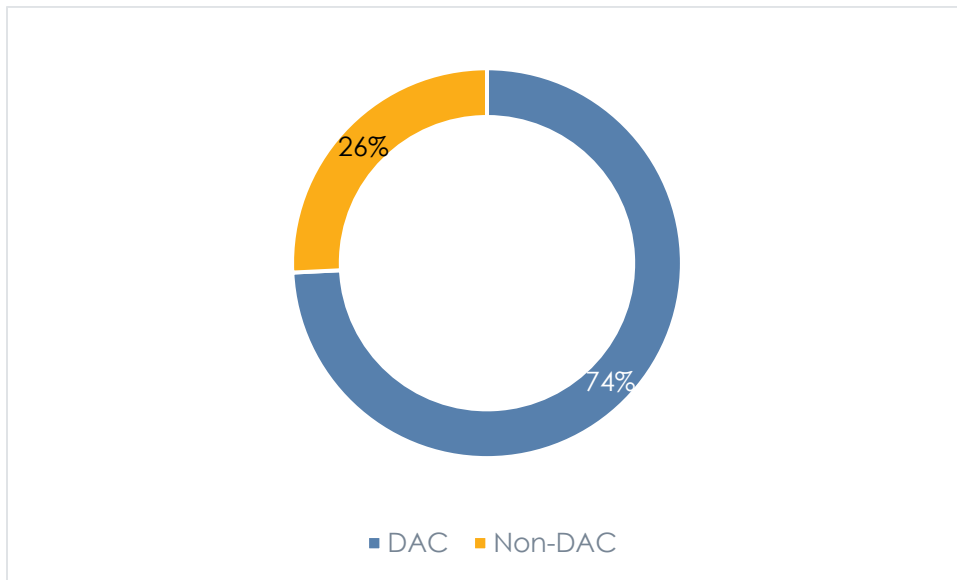
N = 1,762

The SOMAH PA is focused on engaging tribal entities and increasing the number of applications on tribal lands. This reporting period, the SOMAH PA placed an emphasis on information gathering through research on the structure of tribal entities. Other focused activities included completing a PA-wide cultural competency training specifically concentrated on engaging with tribes and attending two tribal roundtables. Through gathering background information on tribal entities, the SOMAH PA is better positioned to engage with tribes in 2023 and will likely have more success with outreach attempts and application document guidance as a result of this information and increased awareness.

The SOMAH PA organized two calls with contractors who work with tribal properties to better understand the challenges they have faced through participating in SOMAH while working with tribal entities, specifically. These contractor meetings were great opportunities to learn about the present barriers and how the SOMAH PA can work to mitigate these barriers to increase participation. The SOMAH PA is also working to develop supporting resources in summary of the types of tribal properties and acceptable documents, which will be made available in Q1 2023. In December 2022, the SOMAH PA, developed a Tribal Barriers to Entry Memo with the assistance of the Advisory Council (available in the Media Center).

As introduced in Section 3.1.1, Application and Incentive Statistics, the updated CalEnviroScreen 4.0 now designates lands under federally recognized tribes as disadvantaged communities (DACs). This increases opportunities for tribal program participation in SOMAH, due to the eligibility of DAC properties. The SOMAH PA is also planning a ribbon-cutting event with the Bishop Paiute Tribe Community Development in 2023. Case study content will be created from this ribbon-cutting, which will build credibility among the tribal community by showcasing a successful project and the benefits it brings.

Digital Marketing and Events

In Q1 2023, the SOMAH PA will launch a property owner nurture email campaign to engage owners who are already interested in SOMAH and subscribed to the program's email list but may not have any active projects yet. This email campaign will provide property owners with informational content pieces about SOMAH so they will feel encouraged and confident to submit an application by the end of the campaign. Some content pieces that have been developed and are already available on the SOMAH website include e-books that cover various topics such as Upfront Technical Assistance, property eligibility requirements, as well as solar installation expenses and finance options. Additional content includes an overview video on the SOMAH Program specifically for property owners and success stories on completed SOMAH projects.

The SOMAH PA did not host any webinars during this reporting period, as all webinars took place in the earlier part of the year. However, the PA did participate in two co-marketing webinars with 3C-REN and MCE. The 3C-REN webinar had 25 attendees, and the MCE webinar had 25 attendees. Both co-marketing webinars were for property owners and focused on regional energy programs as well as a SOMAH overview and project case studies.

In 2023, the PA plans to host a variety of webinars for the property audience. These topics include a SOMAH overview highlighting Technical Assistance and Support Services, the Solar 101 series and a roundtable discussion, where ideally an already participating owner could share their experience participating in SOMAH, including lessons learned and tips for fellow owners. We have learned that peer-to-peer sharing is very important to property owners, as they find it valuable to hear from others with similar circumstances.

Property Owner Outreach Events

- Ventura County Housing Conference (10/13/2022)
  - Panel: The Future of Energy at Home (joined by Community Environmental Council)
- Southern California Association for Non-Profit Housing (SCANPH) Annual Conference - (10/28/2022)
- SDHF: Annual Affordable Housing & Community Development Conference - (11/1/2022)
  - Panel: How Community Partnerships Can Increase Energy Equity (joined by CEJA)

The SOMAH website and social media channels served as additional channels for digital marketing and engagement with the property owner audience. The main property owner's webpages on the SOMAH website performed well during this period with a total of 1,229 page views, plus 1,322 page views of the property owner paid media landing page. On October 31, 2022, the new program website launched, with updates that aim to greatly improve user experience and provide program information in a clear manner supporting user engagement for all audiences. A Check Eligibility Form was added to the homepage, which had nine submissions leading to six communication emails in the first two months from going live.

The SOMAH PA also deployed different paid digital marketing campaigns from April 1 to September 30, 2022, via Google ads, Facebook, LinkedIn and Twitter platforms. The campaigns generated 178,067 impressions and 1,814 clicks on Google Ads, 146,870 impressions and 1,497 clicks on Facebook and 320,875 impressions and 1,559 clicks on LinkedIn.[17] In May 2022, the paid property owner campaign integrated an interest form sign-up sheet on a landing page. Once an interested owner submitted their contact information, the SOMAH PA reached out to schedule an interest call and discuss program eligibility, incentives and benefits. From July 1 to September 30, 2022, there were a total of 20 interest forms submitted, with seven from nonprofit property owners and 15 from for-profit developers. The SOMAH PA will continue these engagement

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[17] An impression is that a platform user saw the ad, while a click is a user who interacted with the ad by clicking on it. If the ad was clicked, the user would be sent to the SOMAH website to review specified content in the ad.

efforts and coordination of interest calls, which allow for a deeper look into property eligibility.

The email listserv increased to 32 new property owners during this time, with 21 subscribers attained while the paid marketing campaigns were deployed, which indicates that it was a successful method in generating leads for new property owner engagement. The listserv provides important program updates, including funding announcements, program changes and alerts about upcoming events and webinars. Additionally, the listserv subscribers will receive the nurture campaign content launching at the beginning of 2023.

Figure 34 – Property Owner Subscribers Over Time
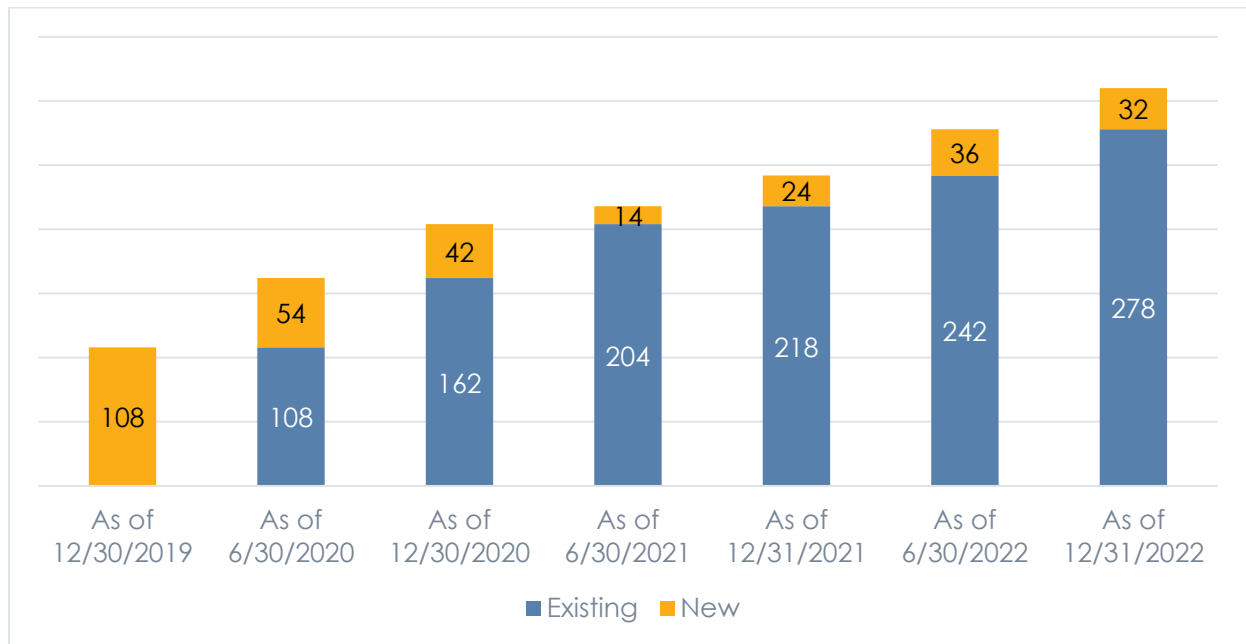
Finally, SOMAH's community-based organization (CBO) partners continue to support property owner outreach through direct outreach efforts, leading to interest calls. CBO partners conduct direct outreach including emails, phone calls and in-person site visits to properties located in communities with whom they have working relationships. During this reporting period, there were a significant number of property owner handoffs from the CBO partners, which led to four interest calls and five additional Upfront Technical Assistance Preview Report requests, further exemplifying the benefits of SOMAH's CBO partnerships in bringing new connections to the program.

CBO partnerships have proven to be extremely important to ensure that SOMAH outreach messaging and materials are appropriate and well-informed to reach multifamily affordable housing providers and their residents across the state. Additionally, the CBO partners have provided invaluable marketing support for the promotion of SOMAH events and program updates. See Section 3.2.5 for more information about SOMAH's CBO partnerships.

3.2.5 Tenants

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

Community-Based Organization Partnerships

The SOMAH PA continues to work closely with the program's now eight CBO partners[18] to support outreach to the community-at-large, property owners, governmental stakeholders, job trainees and tenants aiming to increase SOMAH awareness and participation in the program. During this reporting period, CBOs organized or participated in 33 outreach events or workshops. Additionally, CBOs conducted 54 outreach activities, including email, 1:1 meetings, presentations, and mailer campaigns, to engage property owners. CBOs also participated in 54 outreach activities to engage government stakeholders.

CBO administrative loads decreased as the organizations built more capacity and gained deeper technical understanding of the program. This reduction in administrative effort has allowed CBO partners to increase their community outreach and focus on reaching their diverse audience types.

[18] SOMAH CBO partners include California Environmental Justice Alliance, The Asian Pacific Environmental Network, Communities for a Better Environment, Community Environmental Council, Environmental Health Coalition, OC Goes Solar, Self-Help Enterprises, and The Niles Foundation.

Tenant Education

Updated Strategies

The SOMAH PA continues to promote its Tenant Education Services for applicants through continued quarterly Tenant Education Trainings/Webinars for SOMAH applicants, including the Applicant and Contractor Eligibility Training and public forums. The SOMAH PA has seen an increased interest in tenant education service with 38 calls to the Tenant Hotline in 2022. Fourteen of the calls were connected to eight unique SOMAH projects. The PA has noticed as tenants and on-site managers take advantage of the Tenant Hotline, the team is able to engage properties and often able to provide an on-site tenant education workshop.

Over the last two quarters, the SOMAH PA and CBO partners have responded to a total of five tenant education service requests, converting to four in-person tenant education workshops. Additionally, the SOMAH PA extended contracts with two additional CBO partners through to December 2023, totaling six renewed contracts for 2023.

Tenant Education Surveys

The SOMAH PA continues to implement and analyze tenant education surveys and evaluations. In November, the SOMAH PA deployed its full tenant education survey to a total of nine properties, three each in SCE, PG&E and SDG&E territories, for a total of 695 tenant units. Surveys were modified from the pilot deployment to allow online responses in addition to direct delivery as well. The goals of these evaluations were to: 1) assess existing tenant education materials; 2) evaluate how tenant education requirements are being met, as well as challenges and barriers faced; and 3) ensure that survey participation is significant. Additionally, tenants receive a $20 incentive once completed surveys are received by the SOMAH PA.

Surveys were deployed November 1, 2022, with responses required for virtual submittal or postmarked by December 15, 2022. The SOMAH PA will analyze the survey results in Q1 2023, which will inform tenant education changes, including revision to current tenant education materials and program requirements. More information on these results and efforts will be included in the next progress report.

Lastly, the SOMAH PA socialized potential tenant education requirement changes with stakeholders, including CBO partners, the Advisory Council, JTO Task Force and attendees at the public forum. Expected changes include:

1. NEW: Handbook change
   - Contractor Tenant Education Requirement
     - Share revised: 60 days or more before install
       - Get paid to install solar
       - What to expect with SOMAH
       - Site Safety Map
2. CHANGE: Handbook change
   - Host Customer/Property Owner
     - Share: 60 days or more after install
       - IOU ESA Materials
       - How will your utility bill change?
       - Simple ways to save on energy
3. NEW: Handbook change
   - Required online Tenant Education Training in addition to contractor training
     - By project leads
       - Track A: Host Customer/Property Owner
       - Track B: Contractors

Final tenant education requirement changes will be informed by tenant education survey results, and subsequent changes will be rolled out in 2023.

Data from tenant education affidavits shows 94% of tenant education materials were provided via direct delivery, and 6% were sent via indirect mail.

Affidavit Ensuring Tenant Education

The SOMAH PA also continues to review the Affidavit Ensuring Tenant Education to understand how tenant education is being conducted and provided. Currently, there are 133 signed affidavits, of which 6.02% of projects met the first tenant education requirement outreach method via USPS, and 93.98% via direct delivery to tenants. For the second tenant education outreach method, 98 of the 133 signed affidavits, or 73.68%, indicate that the SOMAH-approved materials are provided in common areas within the property.

While the second method of tenant education outreach is not prescribed, the SOMAH PA wants to ensure that the methods of engagement utilized effectively inform tenants of the benefits of SOMAH. The SOMAH PA intends to utilize the data collected from the Affidavit Ensuring Tenant Education, along with the tenant education surveys, to inform the tenant education requirement changes and Tenant Education Services.

Figure 35 – Method of Delivery for Tenant Education Materials, Second Requirement
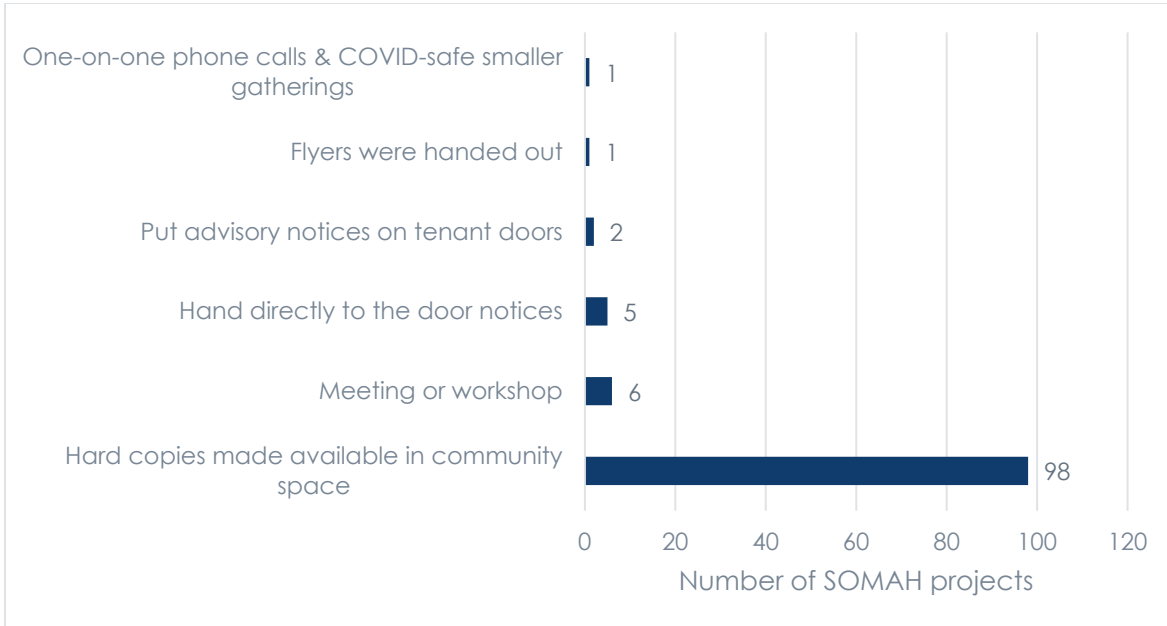
N = 133

3.2.6 Stakeholders

Stakeholder outreach is an important part of the SOMAH Program's ME&O efforts. SOMAH stakeholders include, but are not limited to, local government offices, elected officials, IOUs, CCAs, regional energy networks (RENs) and California energy efficiency program administrators. Building and maintaining partnerships with stakeholders strengthens the credibility of the SOMAH Program and ensures the program is reaching target audiences across the state. The goals of stakeholder outreach are to: 1) spread awareness of the SOMAH Program; and 2) encourage actions such as co-marketing efforts to reach potential participants and ultimately generate new projects.

Throughout 2022, the SOMAH PA engaged in activities across these two focuses, including, but not limited to, collaborating with energy efficiency programs through RENs and the IOUs, speaking at conferences and webinars and developing co-marketing materials. The following sections summarize the PA's accomplishments from July through December 2022.

IOUs, CCAs and RENs

This reporting period, the SOMAH PA maintained collaboration with the IOUs —Liberty Utilities, PacificCorp, PG&E, SCE and SDG&E. The SOMAH PA met regularly throughout the year with PG&E and SCE Single Point of Contacts (SPOC) and Energy Saving Assistance Common Area Measures (ESA CAM) programs. On November 9, 2022, the SOMAH PA participated in a Joint Utilities Income-Qualified and Clean Energy Programs Workshop. The SOMAH PA also worked with the IOUs to obtain logos for the updated SOMAH website to increase legitimacy of the program, which can be seen at the bottom of the new SOMAH homepage.

Additionally, from April through July, SoCalREN included updates on the SOMAH Program in e-news blast updates to participating contractors. On July 12, 2022, the SOMAH PA co-hosted a webinar with SoCalREN. Links to SoCalREN, BayREN and 3C-REN were included on a Stackable Programs page on the SOMAH website. The SOMAH PA participated in a webinar hosted by MCE in partnership with the City of Richmond on August 17.

Local Governments and Elected Officials

During the second half of 2022, the SOMAH PA also met with representatives from four cities and one county — City of Richmond, City of Chula Vista, City of Berkeley, City of Fremont and County of Contra Costa. The SOMAH PA worked with the City of Richmond through coordination on a webinar hosted by MCE, as described in the section above. Collaboration with the City of Chula Vista resulted in an article in its November newsletter about a completed SOMAH project as well as an introduction to the city's housing department. The SOMAH PA made a connection with the City of Berkeley through participation in a Local Learning Resource Network (LERN) webinar with CivicWell on July 12, 2022. This led to connections with the cities of Fremont, Costa Mesa and Berkeley. In follow up, the PA met with the City of Berkeley and provided additional resources on potential eligible properties in their jurisdiction. The PA collaborated with the City of Fremont to create a co-marketing flyer for the city to distribute to property owners. The PA began discussions with the County of Contra Costa and intends to coordinate on a webinar in early 2023. CivicWell also included an article on SOMAH in a quarterly publication that goes out to about 3,000 staff in local governments throughout California.

Additionally, the SOMAH PA presented to two local advocacy groups that led to more local government and stakeholder connections — WeAll CA in September and Sierra Club of Los Angeles in October 2022. The SOMAH PA reached over 35 attendees across

the two groups and made direct connections with the City of Santa Paula, City of Pomona and County of Los Angeles. The SOMAH PA also participated in panels at two conferences related to main stakeholder groups in October 2022, Central Coast Sustainability Summit and San Diego Green Building Conference. The SOMAH PA also displayed a poster at the 13th Annual California Climate and Energy Forum Poster Session. These activities led to new connections made with the Smart Energy Homes program, City of Carlsbad and City of Encinitas.

Finally, the SOMAH PA completed direct outreach to the City of Chula Vista Mayor, San Diego County Board of Supervisors District 1 and San Bernardino County Board of Supervisors District 1 and District 3 offices. The District 3 office promoted SOMAH in its newsletter and is going to make introductions with city governments within its jurisdiction. There are currently no planned actions with the District 1 office, but the SOMAH PA plans to maintain this partnership and work on collaboration efforts in early 2023.

Stakeholder Outreach in Collaboration with SOMAH CBOs

The SOMAH PA meets regularly with participating CBOs on stakeholder outreach, on either a monthly or quarterly basis depending on the CBO. The following leads were made by the SOMAH CBOs in the second half of 2022:

- California Environmental Justice Alliance (CEJA) – Connected the SOMAH PA with four San Bernardino County Board of Supervisor offices in October 2022.
- OC Goes Solar (OCGS) – Conducted direct outreach to the City of Santa Anna, City of Irvine and City of Buena Park; worked with Supervisor Katrina Foley of the Orange County Board of Supervisors for District 3 to include a feature on SOMAH in the August 5, 2022 Weekly Newsletter.
- Asian Pacific Environmental Network (APEN) – Made an introduction to MCE that led to the joint webinar on August 17, 2022, described above.
- Community Environmental Council (CEC) – Submitted an application for and co-presented with SOMAH at a panel presentation at the Central Coast Sustainability Summit on October 13, 2022, described above.

3.3 Workforce Development

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

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

During this reporting period, the SOMAH PA mutually ended its partnership with Rising Sun Center for Opportunity, a workforce development partner organization that was integral to the initial development and launch of SOMAH's job training initiatives. Since then, the SOMAH PA has added two program managers to its workforce development team to fill capacity gaps created from Rising Sun's departure. With this additional capacity, the workforce development staff will be able to directly support contractors with job training requirements and will also maintain and develop relationships with JTOs throughout the state.

Job Training Organization Outreach & Job Trainee Engagement

The current SOMAH application pipeline has created 785 job training opportunities. To broaden SOMAH's pool of eligible job trainees to participate in these opportunities, the SOMAH PA continues to actively contact and vet JTOs that serve targeted trainees and geographic regions where there is lower JTO engagement, including Northern California, the Central Valley, Inland Empire and San Diego County. The SOMAH PA also continues to focus outreach to JTOs that serve priority populations, such as justice system-impacted individuals and those facing other barriers to employment.

Since the last reporting period, the SOMAH PA has verified the eligibility of 17 new JTOs, for a total of 83 active JTOs. This reporting period, the SOMAH PA has been able to increase engagement with JTOs with increased team capacity to specifically focus on JTO partnerships. The SOMAH PA also continues to maintain strong engagement with existing JTO partners, who connect their students and graduates with the SOMAH Program. The SOMAH PA has added 96 new job trainees to the SOMAH Job Training Portal for a total of 465 job trainees engaged on the Job Training Portal.

In addition to engaging with JTOs across the state to expand SOMAH's network of eligible job trainees, the SOMAH PA continues to work with CBOs to inform their local communities about SOMAH's job training opportunities and facilitate local JTO connections. The SOMAH PA is also increasing tenant participation in job training opportunities through tenant education services.

The SOMAH PA continues to engage with job trainees and solar job seekers by facilitating career development workshops. In December 2022, the SOMAH PA hosted a Solar Career Pathways webinar for job seekers to learn about various PV installation career opportunities in the solar industry and hear the experiences of a SOMAH PV installation trainee. The webinar had 44 registrants and 30 attendees. During 2023, the SOMAH PA is developing a resources page on the Job Training Portal that will include access to free online solar training courses from HeatSpring's catalog of classes and a directory of local supportive services where job seekers can access support for transportation, childcare and other barriers to employment.

Contractor Job Training Support

This reporting period, the SOMAH PA maintained supportive efforts for participating contractors in meeting the job training requirements by directly connecting local job seekers and job trainees from the Job Training Portal to contractors with projects near installation. In 2022, the SOMAH PA received and facilitated 17 requests for support with job training from SOMAH contractors, and seven trainees were hired from PA referrals. As a result of this support, 100% of SOMAH projects that submitted the Job Training Affidavit with the Incentive Claim Milestone met all job training requirements.

Additionally, the SOMAH PA continues to organize and host programming to help contractors meet their job training requirements and support local and targeted hiring goals. In March 2022, the SOMAH PA hosted a Hiring with Purpose: Inclusive Hiring Practices for Solar Employers webinar for contractors, where equity, inclusion and diversity professionals in the solar industry shared their knowledge, best practices and tips on how to incorporate inclusive hiring practices during the hiring process. The webinar had 32 registrants and 24 attendees.

3.3.1 Local Hiring and Job Training Data

During this reporting period, the SOMAH PA received 43 Job Training Affidavits from projects that reached the Incentive Claim Milestone for a total of 79 projects that submitted affidavits. The Job Training Affidavits report 64 job trainees hired to work on SOMAH projects for 169 job training opportunities, with many of the job trainees working

on multiple SOMAH projects, gaining more hands-on experience and solar installation skills. The SOMAH PA has collected demographic information on 41 of the 64 hired job trainees (shown below). Data on job trainee advancement (i.e., the number of SOMAH trainees who become full-time solar employees) and retention is collected through surveys to contractors after each project reaches the Incentive Claim Milestone. To date, the SOMAH PA has received 111 job training surveys, and 22 job trainees were reported to be hired by the contractor for continued employment.

 Local & Targeted Hires
- 28% of job trainees reside in DACs
- 25% of job trainees were local hires (live in the same county as the SOMAH project)
- 78% of trainees were hired on a temporary basis while 15% were permanent hires
- 53% of job trainees were targeted hires
- 83% of trainees worked on direct PV installation
- 7% of trainees worked on post-installation operations and maintenance
- 3% of trainees worked on pre-installation design and engineering
- 21% reported as unemployed or underemployed at the time of SOMAH intake
- 15 tenants of SOMAH properties participated as job trainees
- 17 job training organizations have students or graduates that have participated in SOMAH job training opportunities
- $20.56: average trainee wage
- 70.75: Average number of training hours per project per trainee.

Figure 36 – Job Trainee Race/Ethnicity Breakdown
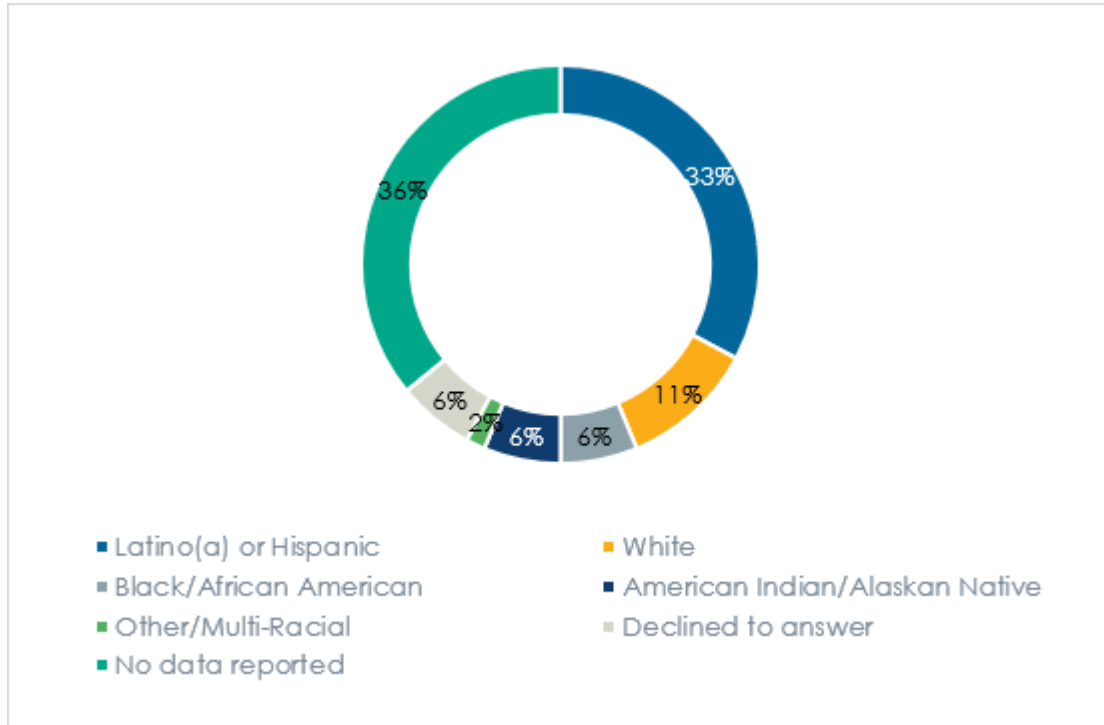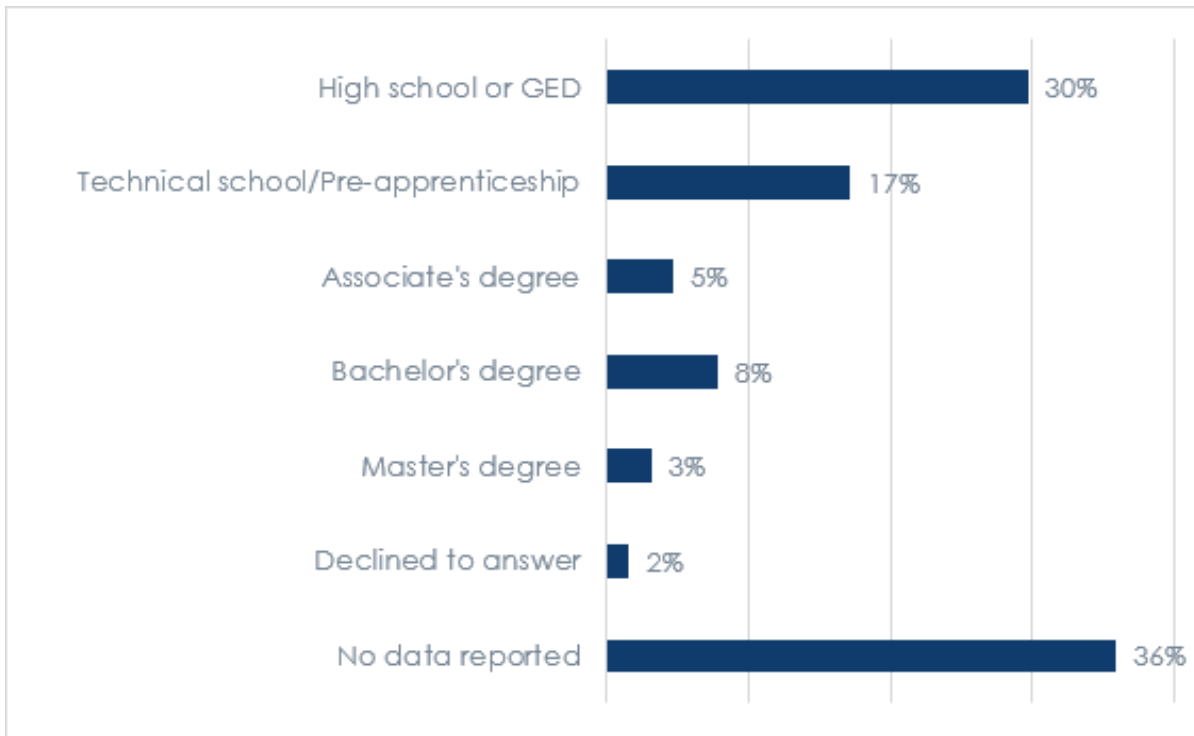

N = 64

Figure 37 – Job Trainee Gender Breakdown
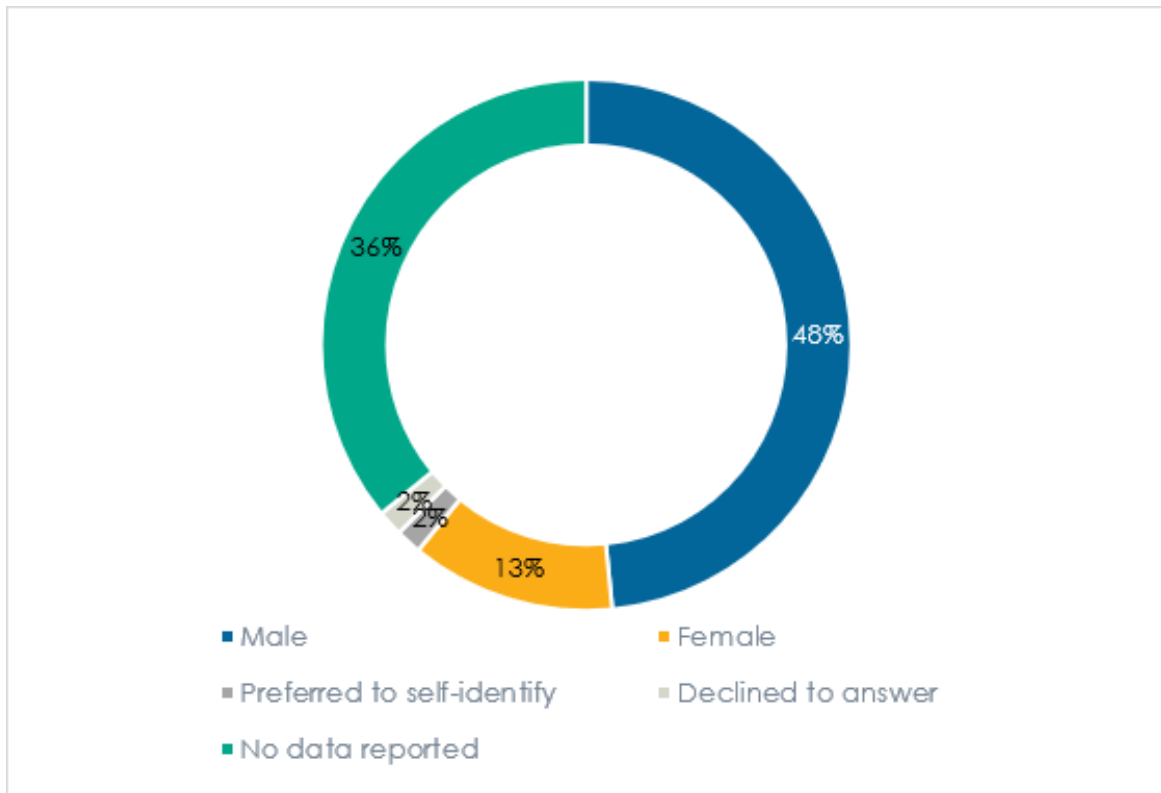
N = 64

Figure 38 – Highest Level of Job Trainee Education

N = 64

The PA is in the process of improving data collection and analysis. Future reporting will better reflect the results of our work in ensuring that SOMAH projects accomplish hiring requirements and in expanding access to training opportunities for local and targeted trainees.

3.4   Technical Assistance

The SOMAH Program offers two no-cost technical assistance (TA) options: Upfront TA support services and Standard TA support services. Installing solar PV on existing multifamily properties often requires property owners to navigate and overcome barriers, including complicated ownership and financing structures as well as crunching the numbers on solar costs and benefits. To help level the playing field and overcome these barriers, the SOMAH Program offers two TA options to provide personalized technical assistance support services to bridge these knowledge gaps and to help facilitate solutions to common issues faced along the way.

3.4.1 Upfront TA

Upfront TA support services are designed to supply property owners participating in Track A with educational, technical and financial resources to facilitate their solar PV installation. Offering Upfront TA support services not only sets the SOMAH Program apart from similar previous programs but provides property owners who are less familiar with solar equal access to program benefits.

Property owners enter Track A with varying levels of solar knowledge. Through guidance from a designated energy project manager, each property owner receives personalized support to accommodate their specific needs, including understanding the SOMAH Program process, investigating the solar potential at their property through the presentation of a solar feasibility report, selecting an eligible contractor using a multiple bid process and evaluating the costs and benefits of moving forward with a solar PV project.

To date, there have been 12 Track A projects that have received Upfront TA support services. Of those 12 projects, four have been canceled or withdrawn for various reasons.

Tenant benefits continue to be a central pillar of the SOMAH Program as well as a focus within Track A. For the eight active Track A projects, over 600 low-income households are projected to receive direct benefits from solar credits. Of the eight active Track A projects, seven received PV sizing analyses and proposed system designs where 89% of the clean energy produced is expected to benefit tenants via VNEM bill credits. The energy produced by these proposed systems is expected to offset approximately 73% of the tenants' historic annual electrical consumption. The average estimated system size for the seven projects is 124 CEC-AC kW with an average expected aggregate annual output of 212,109 kWh.

Figure 39 outlines additional system statistics across the IOU territories for the seven active Track A projects that have been approved for and received Upfront TA support services. It should be noted that the eighth active Track A project has an existing solar PV system with owner and tenant offset. The SOMAH Program is currently looking into options on how additional solar PV can be added to provide additional tenant benefits.

Figure 39 – Track A Summary

| IOU	Number of Active Track A Projects	Estimated SOMAH Incentive	Estimated System Size (CEC-AC kW)	Expected Aggregated Annual Output (kWh)
PG&E	2	$391,639	151	234,136
SCE	4	$1,163,580	471	837,539
SDG&E	2	$715,556	248	413,089
Liberty Utilities	0	$0	0	0
PacifiCorp	0	$0	0	0
Total	**8**	**$2,270,775**	**869**	**1,484,764**

Tenants will receive added benefits from the Track A projects that have decided to pursue deep energy retrofit scopes in conjunction with solar. Four out of the eight projects were either referred to SOMAH from a comprehensive energy efficiency program in which they are currently enrolled or used Upfront TA support services to receive a referral to, and enroll in, a comprehensive energy efficiency program.

To improve property owners' understanding of the intricate ownership and financing structures available, the solar feasibility report presented to property owners during Upfront TA has been updated to provide additional clarity on the system ownership options available, including a financial summary that compares the costs and benefits of common metrics across the different ownership types. The updates will further ensure that property owners are presented with offerings that they are likely to find in the market from contractors who bid on their projects.

3.4.2 Standard TA

Standard TA support services are available to both Track A and B projects and can be requested by property owners or their contractors at any time during their enrollment in SOMAH. Challenges and questions can arise at any point during a solar project, and Standard TA support services are designed to aid property owners and contractors when needed.

Figure 40 – Standard TA Services Requested
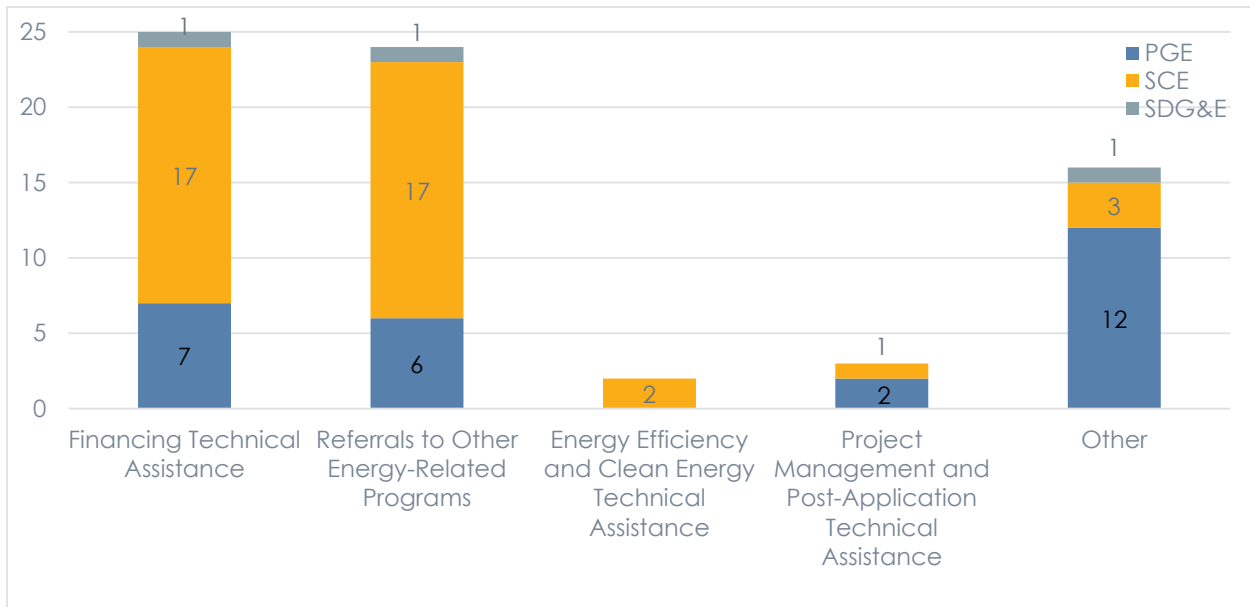
Most of the Standard TA support services provided to date have been financial assistance and referrals to other energy-related programs for projects looking to leverage SOMAH with other similar programs. Standard TA support services were provided to two projects to identify pathways to consider electrification and for assistance sizing their SOMAH PV system to account for energy efficiency upgrades. Other Standard TA support services that were provided include Energy Efficiency Compliance Milestone support, general program support in meeting program requirements, solar feasibility and utility data analyses. To date, 41 projects have made a total of 70 Standard TA requests. Figure 40 shows the breakdown of Standard TA support services provided across the IOU territories.

To date, there have been two projects with Track A connections that have requested Standard TA support services. One project was a Track A project that received Upfront TA support services and requested contractor support after their Reservation Request Package was submitted. Another project with the same host customer as a canceled Track A project requested support in meeting program requirements. One result of this request was a tenant education workshop.

4. Program Planning and Development

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

Official Record Maintenance

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

- SOMAH Incentive Budget Report and Working Data Set (updated weekly)
- Semiannual Progress Reports
- Semiannual Expense Reports
- Annual marketing, education and outreach (ME&O) plans

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

- Special reports to the California Legislature
- Third-party evaluation reports

Place of record: https://www.cpuc.ca.gov/General.aspx?id=6442454736

During this reporting period, the SOMAH PA highlights: 1) an update on activities related to reporting, feedback and accountability; and 2) approved handbook updates, including setting targets for DAC participation in the program.

4.1 Reporting, Feedback and Accountability Mechanisms

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

4.1.1 Public Forums

SOMAH public forums are quarterly events that 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 experience with the program, including challenges, barriers and areas for improvement.

The SOMAH PA held one public forum during this reporting period. The public forum included an update on key program statistics and activities across SOMAH's different program areas. In addition to the general program update on key statistics and announcements, the Q3 2022 Public Forum included a session that presented updates to SOMAH's tenant education requirements and future tenant education strategies.

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 event.

Q3 2022 Public Forum place of record

- SOMAH Public Forum Q3 2022 Presentation
- SOMAH Public Forum Q3 2022 Notes

4.1.2 IOU Working Group

During the reporting period, the SOMAH PA held five IOU Working Group meetings (July, August, September, October and November 2022). The Q3 and Q4 2022 working group meetings focused on the following topics:

- July 2022 – Application statistics and marketing coordination updates, SGIP/SOMAH crossover check in
- August 2022 – General program and marketing coordination updates
- September 2022 – General program and marketing coordination updates, review of program eligibility requirements
- October 2022– General program and marketing coordination updates, ESA Annual Data Request, IOU budget coordination, Incentives PFM update
- November 2022 – General program and marketing coordination updates, IOU budget coordination, updated SOMAH website, ESA Annual Data Request reminder.

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

4.1.3 SOMAH Advisory Groups

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

Advisory Council

The purpose of the SOMAH Advisory Council (SOMAH AC) is to ensure that the voices and interests of equity-focused community advocates and key stakeholders remain at the center of the SOMAH Program and that SOMAH maximizes benefits to low-income tenants and DACs by advising the SOMAH PA on program development and implementation. Since the last reporting period, there have been no changes to SOMAH AC membership. There are 11 members in this cohort — six new members and five returning members — that represent the fields of environmental justice, workforce development/labor, tenant rights and economic justice, affordable housing, tribal communities and the solar industry. The SOMAH AC meets quarterly and virtually. In Q4 2022, the SOMAH AC had its annual joint meeting with the JTO Task Force.

Q3 2022 topics and discussions included:

- A space for introductions and building connections between AC members
- An overview of SOMAH Program updates, stats and relevant regulatory and policy updates since the last quarterly meeting
- An introduction to SOMAH's design factor, its challenges and inequities and proposed ideas and solutions to address its challenges.

Q4 2022 meeting topics and discussions included:

- A space for introductions and building connections between AC and JTO TF members
- An introduction to the Inflation Reduction Act (IRA)
- An end-of-year reflection highlighting major successes and 2023 priorities for each of SOMAH's program areas
- Breakout discussions on planning for: 1) AB 2143 prevailing wage requirements; and 2) barriers to increasing tribal access in the SOMAH Program.

Job Training Organization Task Force

The purpose of the Job Training Organization Task Force (JTO Task Force) is to ensure that the voices and interests of job training organizations remain at the forefront of the

SOMAH Program's job training efforts. The JTO Task Force advises the SOMAH PA on strategies for engaging job trainees and the creation of resources to ensure that trainees obtain maximum benefit from training opportunities on SOMAH installation projects, including subsequent, full-time job offers in the solar industry and, over time, career advancement and wage growth. The JTO Task Force is composed of nine regionally diverse representatives from JTOs, including California Community Colleges, career technical education programs, community nonprofits and private job training centers. Similar to the SOMAH AC, the JTO Task Force meets quarterly.

In November of 2021, the SOMAH PA released a Request for Applications for new JTO Task Force members, and in February 2022, five new members were selected by a selection committee and joined the JTO Task Force. Five returning members continued into a second term for a total of 10 JTO Task Force members. Since the last reporting period, the JTO Task Force has held three quarterly meetings.

Q3 2022 topics included:

- Discussion of potential policy changes: 1) CSLB Licensing, which would preclude C-46 solar contractors from installing an energy storage system larger than 80 kWh when paired with PV; and 2) AB 2143, which would require all projects larger than 15 kW to pay all crew members prevailing wage.
- Continuation of the priority area workshop, focusing on the findings from the working groups: targeted JTO engagement and connection to jobs, opportunity accessibility and career advancement strategies. Reviewing the priorities from each working group and deciding which are immediate/short term and which are long term.

Q4 2022:

- Annual crossover meeting with the Advisory Council. Refer to Q4 2022 meeting topics highlighted under the Advisory Council section.

4.1.4 Third-Party Program Evaluation

As directed in D.17-12-022, Energy Division is to provide regular evaluations of the SOMAH Program to the Legislature. Verdant Associates has operated as the third-party evaluator for the SOMAH Program for Phase I and Phase II Evaluations, Vendor Assessment and the upcoming 2023 Triennial SOMAH Program Evaluation. These evaluation efforts are designed to assess program impacts and progress on metrics and reaching program goals.

Phase I, Phase II and Vendor Assessment

The Phase II Evaluation was finalized in October 2021, followed by the SOMAH PA working closely with Energy Division to complete the CPUC Response to Recommendation (RTR) process. The RTR was then finalized with public comments and replies in February 2022. Subsequently, the SOMAH Vendor Assessment was released later in February 2022, and the SOMAH PA completed the RTR process for that vendor evaluation in the following weeks. The CPUC website maintains records of all files relating to the SOMAH evaluation reports.

Through the RTR process for both the Phase II Evaluation and Vendor Assessment, the PA formally indicated the response to or implementation plan for the evaluation's recommendations and addressed public comments where applicable. The SOMAH PA continues to work closely with the Energy Division (ED) to identify opportunities to incorporate key recommendations into the program's overall priorities and strategic efforts. During regular check-ins with ED, the SOMAH PA and ED discuss ongoing actions for RTR implementation and overall program administration efforts. The SOMAH PA also presented on some of the recommendation implementation plans at the Q2 2022 Public Forum, with a session on streamlining SOMAH's application process focusing on updates to the Reservation Request Milestone and associated handbook changes, as mentioned in Section 3.1.0, Applications and Incentive Statistics.

Other Phase I and Phase II RTR implementation efforts from 2022 include some of the following:

- Assessment of canceled applications and re-engagement screening for outreach, included updated tracking of cancelation reasons
- Expanded suite of support services to enhance the program's technical assistance offerings
- Subcontractor engagement and partnerships with existing primary contractors to increase overall contractor diversity and track participation
- Investigation and partnership with bridge loan assistance and assessment of supportive financing offerings
- Review and refresh of property ownership type data to better capture characteristics of participating properties
- One-on-one outreach with non-participating property owners through interest calls, prescreen services and technical assistance
- Further review of SOMAH's eligibility criteria and barriers to participation where modifications could extend the program's reach

- Utilize and promote case studies for completed projects and engagement with ribbon-cuttings and community events
- Increased co-marketing with IOUs to further brand and program awareness and increased interaction with the program.

2023 Triennial Evaluation

With a significant shift in program activity through application milestone advances and completed projects since the data available at the Phase II Evaluation, the SOMAH PA has kicked off coordination for the 2023 Triennial Evaluation with third-party evaluator Verdant to align on available program data and program accomplishments. Through Verdant's proposed participation, process and impact assessments, the SOMAH PA will work to support the evaluation efforts into 2023 and complete the RTR process in the second half of the year following the June 2023 finalization of the Triennial Evaluation Report. Verdant held a public webinar on October 4, 2022, to share the research plan with stakeholders followed by public comments that were due October 14, 2022. The SOMAH PA has engaged in coordination efforts with Verdant through November and December 2022 to support their data collection efforts and upcoming analysis work in 2023 for the assessment.

The SOMAH PA will continue to reference, incorporate and address key findings and recommendations from the Triennial Evaluation into future internal evaluation efforts. Taken together, feedback and input from key audiences, participants, stakeholders and advisors will help inform and modify program areas to ensure the approaches are successful in reaching the audiences and communities SOMAH is designed to serve.

4.2   Program Design and Updates

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

Incentive Petition for Modification

On August 11, 2022, the SOMAH PA submitted a Petition for Modification (PFM) to address the program's annual incentive step-down and incentive levels. The SOMAH PA was intent on making the proposal as straightforward as possible to address the standstill of applications without bringing additional complexity to the program. The goals of the PFM are to: 1) eliminate the current annual incentive step-down methodology; 2) increase the incentive levels to better align with project costs; 3) prioritize DAC and tribal land properties with a higher incentive; and 4) authorize the SOMAH PA to propose future modifications through a Tier 2 Advice Letter. Through

increased incentives, the SOMAH PA intends to jumpstart the program, supporting both the existing project pipeline and attracting new applications. With slowing of applications over the past year (aside from the October 2021 incentive step-down spike), the high level of currently available funding represents an unnecessary delay in delivering energy credits and direct financial benefit to tenants across the state at a time of historic inflation. Increasing incentives to the proposed levels will spur participation, allow for the SOMAH Program to achieve the 300 MW minimum installation target and support the programmatic benchmark of 40% of participating projects located in DACs.

To address the timing of the annual July step-down, the SOMAH PA also submitted an extension request on June 24, 2022, to pause the incentive step-down. The request was subsequently approved on June 30, 2022, providing the SOMAH PA the opportunity to submit the PFM by October 1, 2022, with the incentive step-down paused until the PFM has been determined by the CPUC. The SOMAH PA currently awaits a Decision from the CPUC to determine next steps.

4.2.1 Program Handbook

This subsection 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 SOMAH Program Handbook.

Sixth Handbook Edition: Developed and Submitted

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

Figure 41 – Handbook Versions

Version	Major Updates	Approval Date
Handbook 1.0 (original)	• Established original program offerings and requirements	March 2019
Handbook 2.0	• SOMAH & MASH Stacking	May 2020
Handbook 3.0	• Progress Payments	December 2020
Handbook 4.0	• Application Pipeline Management (Lottery) • Required Notification for Early Job Trainee Termination • System Changes Affecting Incentive Amounts • Assorted minor updates	May 2021
Handbook 5.0	• 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 6.0	• Splitting Reservation Request into two phases to streamline application process • Removal of Multifamily Affordable Housing Document Cover Sheet • Removing the requirement of checklist for program participants • Removal of application deposits for ALL applicants	Pending

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

The SOMAH PA's proposed sixth handbook edition was submitted via a Tier 2 Advice Letter this period, protested in part, and substitute sheets submitted for clarification after a reply to the protest. Below provides a summary timeline regarding CSE Advice Letter 138-E:

- CSE Advice Letter 138-E: September 29, 2022
- Protest by Public Advocates Office: October 19, 2022
- SOMAH PA Reply to Protest to CSE Advice Letter 138-E: October 26, 2022
- Substitute Sheets for CSE Advice Letter 138-E: November 9, 2022, and December 14, 2022
- Protest to Substitute Sheets by Public Advocates Office: January 13, 2023
- SOMAH PA Reply to Protest to Substitute Sheets for CSE Advice Letter 138-E: January 23, 2023

Advice Letter 138-E was submitted to propose the following changes to SOMAH's Program Handbook.

- Create an application workflow change to break the Reservation Request Milestone into two phases with the intent to reduce administrative burden and provide a quicker timeline for IOU data request and data sharing
- Streamline the requirements and process flow of application submission and SOMAH PA review at the Reservation Request Milestone
- Remove the Cover Sheet document requirement
- Remove the Application Deposit requirement
- Adjust the timelines to submit the Reservation Request Package from Upfront TA Approval and the Energy Efficiency Compliance Milestone to after Reservation Request Approval
- Provide the option to conduct the final inspection remotely (when appropriate).

As of the publication of this SAPR, the proposed changes were pending and under review by the CPUC. If approved in whole or part, the SOMAH PA will report on implementation and efficacy of changes in future progress reports.

Future Handbook Edition Development: Planning Stages

This period, the SOMAH PA also began collating potential changes for future handbook editions, pending further PA analysis, stakeholder engagement and planning. These potential changes include the following.

- **Tenant Education:** Changes to SOMAH's tenant education requirements to ensure the delivery of timely information at various stages of program participation and the life cycle of a solar energy system installation project.
- **System Monitoring:** Changes, if needed, to provide the SOMAH PA the ability to monitor interval production data for incentivized systems, such as the information needed from applicants to access said information during the Incentive Claim Milestone. The development of this platform allows the PA to ensure incentivized systems are functioning and providing bill credits for owners and tenants as intended, as through post-installation technical assistance in partnership with contractors and owners.
- **Tribal Access:** Indeterminate changes arising from the SOMAH PA and advisory bodies' exploration of barriers to increased tribal participation.
- **Third-Party Evaluation Recommendations:** Indeterminate changes arising from SOMAH's second triennial third-party evaluation's findings and recommendations.

5. Conclusions

The SOMAH PA is committed to supporting applicants through environmental and economic barriers along with industry challenges. The SOMAH PA acknowledges historic inflation, supply chain challenges, ongoing effects of COVID-19 and construction delays have greatly impacted project completion. During the second half of 2022, the SOMAH PA filed a Petition for Modification (PFM) to increase SOMAH incentives and swiftly reviewed the newly submitted projects in Q3 and Q4 2022 after a slower start to program activity in the beginning of the year. The SOMAH PA also expanded services for participants such as the Affordability Prescreen and Technical Assistance (TA) and Support Services. To provide further resources and a better user design experience, the SOMAH PA released a new SOMAH website in November 2022. The SOMAH PA recognizes the importance of offering trainings and feedback opportunities to applicants and values the input provided from tenant surveys, subcontractor interviews and tenant education workshops that were hosted in the second half of 2022.

The SOMAH PA is dedicated to reaching the programmatic DAC benchmark by working closely with program partners and stakeholders and celebrates that CalEnviroScreen 4.0 now designates land under federally recognized tribes as DACs. The program continues to emphasize DAC and tribal communities as priority groups, who currently benefit from the waiver of application deposits as well, in an effort to decrease the financial barrier to participation. Furthermore, the SOMAH PA is focused on continued engagement and collaboration with tribal entities to increase applications on tribal lands. Engagement included conducting research on the structure of tribal entities, members of the SOMAH PA Team completing a cultural competency training concentrated on engaging with tribes and members of the SOMAH PA Team attending two tribal roundtables. The SOMAH PA greatly values input and collaboration from tribal entities and will continue to focus on understanding barriers faced by tribal properties in 2023.

Development of the 2023 ME&O Plan was guided by evaluation recommendations, internal surveys and focus group evaluations to address outreach gaps. Similar to 2022, the plan focuses on property owner outreach, the newly DAC-designated federal tribal land properties, contractor and subcontractor diversity, in-person COVID-19 safe tenant education workshops, showcasing job trainee solar career success stories and increasing stakeholder outreach. The 2023 ME&O Plan, which will maintain the same primary goals, will be finalized in Q1 2023. Survey responses and research to evaluate property owner's engagement, motivation and application obstacles are projected to be reported in Q3 2023. Connecting with property owners, with an emphasis on reaching out to owners in DACs, will remain a focus in 2023. The SOMAH PA plans to host a variety of webinars for the property audience and is planning a ribbon-cutting event with the Bishop Paiute Tribe Community Development in 2023.

Looking to 2023, the SOMAH PA anticipates a high rate of project completion along with an increased volume of progress payments and final incentive payments. The SOMAH Program was designed to deliver renewable energy and financial benefits to tenants of multifamily affordable housing. To ensure the communities the SOMAH Program is intended to serve are being supported equitably with a dynamic and adaptive program, the SOMAH PA continues to engage in evaluation efforts and solicits feedback and input from CBOs, participants, stakeholders and advisors. In the second half of 2022, the SOMAH PA began coordinating the 2023 Triennial Evaluation with third-party evaluator Verdant to assess available program data and accomplishments.

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.
- 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.

- 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

- 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.
- Pending IOU Approval – Progress Payment: The program administrator has completed the application review and is now pending payment approval by the IOU.
- Pending QA – Progress Payment Pathway: The Progress Payment Pathway has been reviewed by the program administrator and is pending quality assurance check.
- Pending Virtual Walk-through: Program administrator is completing a virtual walk-through. The application is held in this status until results are received and processed.
- 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 – Progress Payment Pathway: The application has been reviewed by the IOU and is in queue for review by the program administrator.
- Resubmitted IOU Approval – Progress Payment: The application has been reviewed by the IOU and is in queue for review by the program administrator.
- 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.

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 on-site PV system inspection and an on-site field inspection will be conducted. The application is held in this status until inspection results are received and processed.
- 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 statues

- Canceled: 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 canceled status after 14 days.
- Unsubmitted: Applicant has started the application, but the information is incomplete and not fully submitted.