Solar on Multifamily Affordable Housing

SOMAH

Semiannual Progress Report

Reporting Period
July 1, 2024 – December 31, 2024

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1. Executive Summary

Covering the second half of 2024, this 11th Solar on Multifamily Affordable Housing (SOMAH) Program Semiannual Progress Report (SAPR) celebrates five years of program accomplishments. It highlights a significant increase in projects with 210 total application submissions in 2024 — an annual increase of 65% over 2023 — along with continued popularity of the Progress Payment Pathway, steady use of the Affordability Prescreen service, progress on system performance monitoring and impactful regulatory activity for program improvements to be implemented in 2025. Marketing efforts continue to target outreach efforts to best suit program applicants and participants to achieve SOMAH's environmental justice goals.

New applications received in Q3-Q4 2024 that remained active at the end of Q4 added 17.95 MW capacity toward the program's 300 MW goal. Twenty-two of these applications were prescreen conversions to application submittal and 10 were Track A applications. During this reporting period, the Affordability Prescreen service helped eight potential projects eliminate extra administrative burden by deeming them ineligible prior to a formal application submission. Additional funding was released for Pacific Gas and Electric Company (PG&E), San Diego Gas & Electric Company (SDG&E) and PacifiCorp Utilities Company, and the program maintained plentiful funding for all investor-owned utility (IOU) territories with immediate application review and no waitlists. The expected early 2024 spike of completed projects shifted to a high project close-out volume in the second half of 2024 due to extension requests as a result of industry impacts that perpetuated delays in construction timelines and project completion. A significant wave of project completions occurred in the second half of 2024 and will continue into 2025. For example, only 29 inspections were completed in Q1-Q2 2024 (PG&E, SCE and SDG&E territories) compared to 111 completed in Q3 and Q4, almost quadruple the previous reporting period.

The SOMAH Program Administrator (PA) continues to emphasize understanding and adapting to participant needs and challenges while striving to implement a resilient and successful program. One key supportive implementation effort during the second half of 2024 was the rollout of the Expected Performance-Based Buydown (EPBB) suspension in Liberty and PacifiCorp service territories, as well as for northern parts and tribal projects in PG&E's service territory, as directed in California Public Utilities Commission (CPUC) Decision (D.)24-11-006.

During the second half of 2024, on-site conferences and tenant education workshops showcased SOMAH-funded systems and promoted their benefits to tenants, property

owners and communities. This included in-person attendance at the Southern California Association for Non-Profit Housing (SCANPH) Annual Conference, the Non-Profit Housing Association of Northern California's Affordable Housing Conference, San Joaquin Valley Housing Summit and Bisnow Multifamily Annual Conference – West.

Community-Based Organizations (CBOs) continue to be strong partners for SOMAH, assisting in outreach and as advisors serving multiple audiences and the SOMAH PA. This past year, CBO partners led and participated in numerous in-person events to highlight the program's community and workforce benefits to property owners, tenants, community members and decision-makers. Moving forward, CBO outreach will prioritize tenant education support and property owner outreach within service regions.

1.1   COVID-19 Pandemic Acknowledgement

The current project queue demonstrates commitment to the program as the completed projects from this reporting period made meaningful efforts to adapt and evolve in the post-pandemic environment. Despite these impacts, the program has continued to see projects progress with their design, construction and interconnection efforts with the most completed projects in a six-month period since program launch occurring during this reporting period. The SOMAH PA remains committed to prioritizing health and safety, while working to advance the goals of the SOMAH Program and help build a resilient California.

2.   Background

The Solar on Multifamily Affordable Housing (SOMAH) Program provides financial incentives for installing photovoltaic (PV) energy systems on multifamily affordable housing. The program is designed to deliver clean power and credits on energy bills to hundreds of thousands of California's affordable housing residents. The program was created by California Assembly Bill (AB) 693 (Stats. 2015, Ch. 582), authored by former 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 funding for the program. CPUC D.17-12-022 (effective Dec. 14, 2017) implemented AB 693 and changed the name of the program to the Solar on Multifamily Affordable Housing (SOMAH) Program to distinguish it from other state clean energy and low-income solar programs. D.17-12-022 established the program's budget, incentive structure and eligibility policies, among other items. The program was further modified by the recent SB 355, signed October 7,

2023. SB 355 extends the program through 2032 and includes several modifications to expand program eligibility.

The SOMAH Program serves electric utility and Community Choice Aggregator (CCA) customers in the territories of Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), San Diego Gas & Electric Company (SDG&E), Liberty Utilities Company and PacifiCorp. Funded through greenhouse gas (GHG) allowance auction proceeds, SOMAH has a program budget of up to $100 million annually for 10 years and an overall target to install at least 300 megawatts (MW) of generating capacity by December 31, 2032.

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

2.1 Application Pathways: Track A and Track B

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

using the Expected Performance Based Buydown (EPBB).[1] methodology. Track A is designed to provide Upfront Technical Assistance (TA) and Support Services for property owners who need assistance understanding if solar is right for their property. Technical Assistance and Support Services provide a well-rounded understanding of a property's energy needs as well as access to educational, technical and financial resources that facilitate valuable energy efficiency upgrades and solar installation. Participants who select Track A have their incentive funding earmarked for the duration of the Upfront TA period, prior to a reservation request. Track A participants typically do not have an identified solar contractor and are guided through a multiple bid process to select an eligible solar contractor for their project.[2]

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

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

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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. Per D.24-11-006 and effective as of November 14, 2024, the EPBB calculator was suspended for all future and active applications in Liberty, PacifiCorp and tribal applications in the PG&E territory as well as PG&E projects located at or above one minute south of the 39th parallel.

[2] Per D.24-11-006, the multiple bid requirement for Track A projects will be removed in a forthcoming handbook change in 2025.

![SOMAH logo]

Figure 1 – Track A and Track B Application Steps

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

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

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

2.3 Program Budget

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

2.3.1 Program Administrative Budget

The administrative budget is shared by the SOMAH PA, CPUC Energy Division and the IOUs. The SOMAH PA tracks the program expenses in four main categories: SOMAH Program Administration; Marketing, Education & 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, 2024.

Figure 2 – Total Program Administrative Expenditures by Category

Category	
SOMAH Program Administration	$23,837,820
SOMAH Marketing, Education & Outreach (ME&O)	$15,670,019
SOMAH Workforce Development	$2,621,187
SOMAH Technical Assistance	$2,124,409
SOMAH Evaluation Expenses[4]	$857,721
Investor-Owned Utility (IOU) Expenses	$6,239,893
Total	$51,351,049

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

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

[5] Detailed expenditure information may be accessed by opening the SOMAH Semiannual Expense Report here: https://www.californiadgstats.ca.gov/programs/.

2.3.2 Program Incentive Budget

The SOMAH PA publishes updated program incentive budget information for each IOU territory to the California Distributed Generation Statistics website[6] weekly. Because each IOU territory's annual incentive budget varies based on specific GHG allowance auction proceeds, the SOMAH PA maintains five individual application queues and up to five waitlist queues, when applicable. The funds for each utility territory may be released at separate times, with the collections based on each utility's Energy Resource Recovery Account (ERRA) or Energy Cost Adjustment Clause (ECAC). PG&E and PacifiCorp funding are released quarterly versus the annual lump sum release for other territories.

The following utility territories released funding during the second half of 2024: PG&E (November 2024), SDG&E (October 2024) and PacifiCorp Utilities (October 2024). Figure 3 summarizes the committed and remaining budget for the SOMAH Program. Figure 4 summarizes the program dollars collected by fiscal year to date for all five IOUs, including the Q4 releases mentioned above, and identifies application totals and available program funds.

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

![SOMAH logo]

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	1.011	3,236,081	0	0	0.182	382,457	0.051	72,177	1.244	3,690,715	279,709,299	171,885,795
	Track B	0	0	0	0	5.342	11,802,296	31.013	62,984,630	14.604	29,345,863	50.959	104,132,789		
	Total	0	0	1.011	3,236,081	5.342	11,802,296	31.195	63,367,087	14.655	29,418,040	52.203	107,823,504		
SCE	Track A	0	0	0	0	0	0	0.207	339,714	0.285	947,237	0.492	1,286,951	337,783,742	273,598,955
	Track B	0	0	0	0	1.507	3,446,039	15.000	33,079,421	13.351	26,372,376	29.858	62,897,836		
	Total	0	0	0	0	1.507	3,446,039	15.207	33,419,135	13.636	27,319,613	30.350	64,184,787		
SDG&E	Track A	0	0	1.242	3,975,364	0	0	0	0	0	0	1.242	3,975,364	92,638,062	63,642,497
	Track B	0	0	0	0	1.528	3,391,083	5.923	12,291,414	4.730	9,337,704	12.181	25,020,201		
	Total	0	0	1.242	3,975,364	1.528	3,391,083	5.923	12,291,414	4.730	9,337,704	13.423	28,995,565		
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	10,219,582	10,219,582
	Track B	0	0	0	0	0	0	0	0	0	0	0	0		
	Total	0	0	0	0	0	0	0	0	0	0	0	0		
Liberty Utilities	Track A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0	0	2,452,225	2,332,055
	Track B	0	0	0	0	0	0	0.055	120,170	0	0	0.055	120,170		
	Total	0	0	0	0	0	0	0.055	120,170	0	0	0.055	120,170		
TOTAL	Track A	0	0	2.253	7,211,445	0	0	0.389	722,171	0.336	1,019,414	2.978	8,953,030	722,802,910	521,678,884
	Track B	0	0	0	0	8.377	18,639,418	51.991	108,475,635	32.685	65,055,943	93.053	192,170,996		
	Total	0	0	2.253	7,211,445	8.377	18,639,418	52.380	109,197,806	33.021	66,075,357	96.031	201,124,026		

Figure 4 – Cumulative Program Budget

	2016 Budget ($)	2017 Budget ($)	2018 Budget ($)	2019 Budget ($)	Under-Collections True-up ($)	2020 Budget ($)	2021 Budget ($)	2022 Budget[7] ($)	2023 Budget ($)	2024 Budget ($)	Application Totals ($)	Total Budget ($)	Remaining Budget ($)
PG&E	1,740,992	4,359,110	39,330,000	33,963,300	31,620,584	34,898,605	28,448,281	41,600,106	38,400,027	25,348,294	107,823,504	279,709,299	171,885,795
SCE	2,733,251	4,536,050	41,400,000	30,581,476	45,542,591	20,410,891	57,569,657	66,028,108	43,839,644	25,142,074	64,184,787	337,783,742	273,598,955
SDG&E	0	0	9,270,000	9,104,076	11,343,785	10,294,957	9,831,156	17,308,193	13,454,945	12,030,950	28,995,565	92,638,062	63,642,497
PacifiCorp	422,443	961,291	1,009,512	1,150,528	0	1,177,394	1,090,332	1,512,862	1,606,391	1,288,829	0	10,219,582	10,219,582
Liberty Utilities	132,440	258,329	314,706	419,517	0	326,327	300,128	401,608	299,170	TBD	120,170	2,452,225	2,332,055
TOTAL	5,029,126	10,114,780	91,324,218	75,218,897	88,506,960	67,108,174	97,239,554	126,850,877	97,600,177	63,810,147	201,124,026	722,802,910	521,678,884

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

3. Program Progress — Key Performance Areas

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

3.1   Program Administration

The SOMAH Program opened on July 1, 2019, which included opening the online application database (PowerClerk®) for application submissions, launching the online bidding tool and commencing 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 $521 million across the program for this reporting period. No IOU territory has had a waitlist since Q4 2020 (SDG&E). Stakeholders and interested applicants should refer to the [program funding page](#) on CalSOMAH.org for up-to-date information on recently released and available funding per territory and can subscribe to the [SOMAH email list](#) for real-time notifications when additional funding is released.

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

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

The lack of a method for applicants to easily retrieve tenant consumption data before submitting a program application has historically resulted in a longer reservation request review timeline. In response to the 2021 Phase II Evaluation Report feedback finding the attainment and timing of consumption data was a barrier, the PA coordinated and implemented application-related program and process improvements throughout 2022–23. During Q3 and Q4 2024 the PA has continued improving the process of retrieving consumption data through leveraging increased communication and improved formatting in the data request process to shorten the reservation request review timeline. Application streamlining efforts have been included in each of the approved handbook versions starting in 2022 with Handbook 5. Historical information on SOMAH's handbook updates is outlined below and in Section 4.2.2, Program Handbook Records.

Figure 5 – Application Status by IOU Territory since Program Start

Program	Active	Complete/ Incentive Paid	Cancelled/ Withdrawn	**Total**
PG&E	277	140	219	**636**
SCE	95	73	100	**268**
SDG&E	61	32	56	**149**
Liberty Utilities	1	0	1	**2**
PacifiCorp	0	0	1	**1**
Total	**434**	**245**	**377**	**1056**

N = 1,056

Of the 147 total applications submitted between July and December 2024, 127 remain active at the close of the reporting period, an increase of 131% over the January through June 2024 reporting period during which 55 of the 63 applications submitted during that time remain active. Application submissions throughout the reporting period were steady with large spikes in August (32 submissions) and December (30 submissions). The increase in new applications was largely attributed to the program's newly expanded eligibility requirements and the PA's increased program engagement and re-engagement efforts. Of the 127 active submitted applications from July through December 2024, 56 new applications were submitted in Q3, and 71 were submitted in Q4. Ten of the new applications were Track A projects, all were submitted in the larger IOU territories (PG&E, SCE and SDG&E) and six participated in the Affordability Prescreen service. Track A application submissions have increased slightly since the last

reporting period. This increase can be attributed to the SOMAH PA's coordination with other energy efficiency program administrators and increased use of the TA and Support Services request form and prescreen service. The prescreen service provides property owners who are unfamiliar with SOMAH the ability to submit applications with confidence with the confirmation of eligibility for the program, an introduction to PowerClerk and the SOMAH PA and the generation of an application number making for a smooth transition into the application process. No new applications were submitted in Liberty Utilities or PacifiCorp territories this reporting period, but the SOMAH PA looks forward to further engagement with the northern utilities with a goal to increase participation in these territories in 2025 and beyond. The active application in Liberty Utilities territory has reached its Proof of Project Milestone. The previously active application in PacifiCorp territory was cancelled during this reporting period, with plans to re-enter the program in the future after resolving extenuating circumstances with site conditions and project planning. The SOMAH PA has been working on marketing and outreach coordination with both Liberty Utilities and PacifiCorp to increase program participation in these small multi-jurisdictional utility territories. The PA has discussed program barriers and disadvantages in the northern multi-jurisdictional utilities and, to address these issues, in Q3 the SOMAH PA developed Technical Assistance Preview Reports for the territories' likely eligible properties, as identified in the SOMAH property eligibility map. The PA completed a first round of property owner outreach directed at the owners of the identified potentially eligible properties in both the PacifiCorp and Liberty territories. The PA contacted each property owner individually and provided them with a high level technical assistance preview report, highlighting projected SOMAH benefits specific to their theoretical projects. The PA plans to build off this first round of outreach with an update to the technical assistance preview reports illustrating the impacts of the EPBB calculator removal for projects located in these two territories. This second round of outreach is planned to be finalized by Q2 2025. The number of total new applications (including both active and cancelled applications) submitted in the previous reporting periods are as follows:

- July–December 2024: 147 new applications
- January–June 2024: 63 new applications
- July–December 2023: 81 new applications
- January–June 2023: 46 new applications
- July–December 2022: 35 new applications
- January–June 2022: 14 new applications
- July–December 2021: 127 new applications
- January–June 2021: 43 new applications
- July–December 2020: 63 new applications
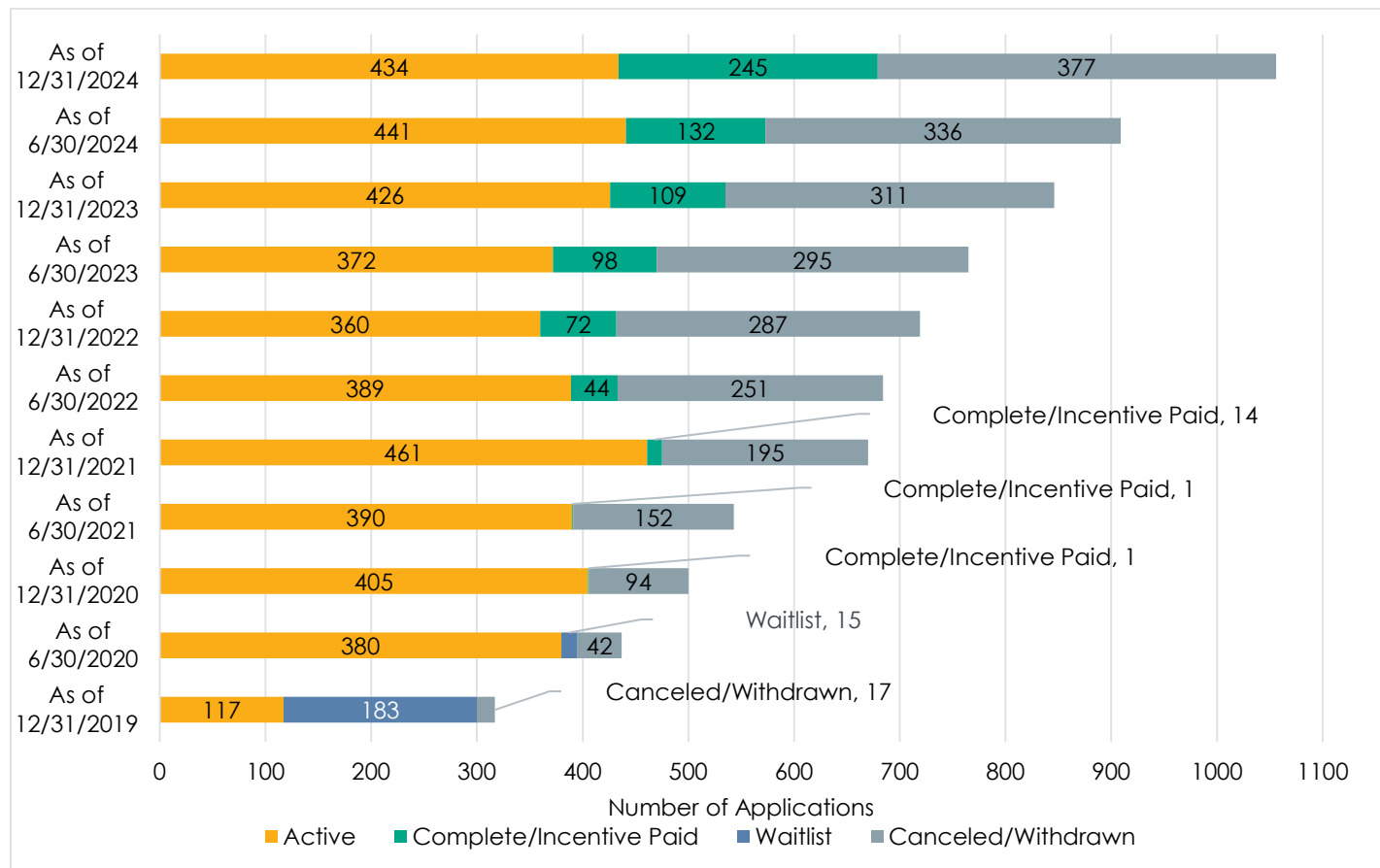- January–June 2020: 120 new applications

- July 2019-December 2019: 317 new apps

Total new application volume in 2024 surpassed the second highest annual volume in 2020, with 210 applications submitted. 2024 application volume (210 new applications) is up 327% from the application slowdown in 2022 (49) and up 65% from 2023 volume (127). Application spikes (greater than 100) occurred before the historic July 2020 and October 2021 incentive step-downs. These spikes correlated with applicants seeking the higher incentive rate before incentive levels decreased. Historically, the program was required to step down incentive rates annually on July 1 of each year. In 2021, the July 1 incentive step-down was postponed due to a pending National Renewable Energy Laboratory (NREL) report used for the incentive step-down analysis. The CPUC approved the SOMAH PA's 120-day extension request, which provided the PA time to complete the analysis and stakeholder outreach prior to the Step 3 incentive rate deployed on October 30, 2021. The absence of an application submittal spike in 2022 aligns with the deferred incentive step-down resulting from the PA's Petition for Modification of the incentive structure. The SOMAH PA was granted an extension to pause the incentive step-down until a Decision on the Petition for Modification was issued by the CPUC. As a result of the extension of the incentive step-down for 2022, the previous pattern of increased application submissions prior to July 1 did not occur in 2022. Per CPUC D.23-03-007, the annual incentive step-down has been removed from the program. See Section 4.2, Program Design and Updates for more information on these program changes. With the removal of the incentive stepdown via Handbook 7 in 2023, applicants can better align the timing of the project and the program application. The program no longer sees application spikes greater than 100 in a month and instead sees a more even spread of application submittals throughout the year, with the 2024 monthly peaks being around 30 applications a month.

Third-party evaluations (2020 Phase I SOMAH Process and Impact Assessment Report, 2021 Phase II Evaluation Report and 2023 Triennial SOMAH Evaluation Report) highlight the importance of pipeline management, which continues to be a key focal point for the SOMAH PA. Pipeline management efforts aim to increase and maintain program participation with continued new application submissions to meet the program's 300 MW goal. Section 3.2, Marketing, Education and Outreach includes more information about SOMAH's ME&O efforts on pipeline management and increasing program participation and diversity.

Figure 6 – Cumulative Applications Received

Date	Active	Complete/Incentive Paid	Waitlist	Canceled/Withdrawn
As of 12/31/2024	434	245		377
As of 6/30/2024	441	132		336
As of 12/31/2023	426	109		311
As of 6/30/2023	372	98		295
As of 12/31/2022	360	72		287
As of 6/30/2022	389	44		251
As of 12/31/2021	461	14		195
As of 6/30/2021	390	1		152
As of 12/31/2020	405	1		94
As of 6/30/2020	380		15	42
As of 12/31/2019	117		183	17

In November 2022, the SOMAH PA launched the Affordability Prescreen service, which provides potential participants with a high-level review of a property's regulatory documentation prior to submitting a formal application through the application portal PowerClerk. The opportunity to partially prescreen properties for SOMAH eligibility alleviates a significant administrative burden for both applicants and application assignees and has been a well-utilized resource for participants. Through the process, participants can also establish a dialogue with the SOMAH PA where questions that may arise during initial application review are answered and rapport is built prior to application submission. By using additional supportive measures, such as the Affordability Prescreen Service and suite of Technical Assistance and Support Services, quality leads with viable projects are better able to submit program applications in PowerClerk. See Section 3.2.4, Property Owners for more information.

With more prescreen requests and the SOMAH PA's desire to streamline the application process, the Affordability Prescreen process migrated to PowerClerk in June 2024. This enhancement integrates the popular service into the same platform as the program

application. Potential applicants can now submit a prescreen request directly through PowerClerk using the VersaForm feature. Unlike the previous iteration of this service, the VersaForm feature does not require a PowerClerk account for submission, further minimizing administrative burden on potential applicants. An additional goal of this process improvement is to increase familiarity with PowerClerk, further encouraging eligible prescreens to convert to an active SOMAH application. Relevant data is automatically copied into the new SOMAH application in the appropriate utility territory once the prescreen request is deemed eligible, reducing the data entry required of the applicant.

Since implementing the Affordability Prescreen service at the end of 2022, 36% of the Affordability Prescreen service entries have become active SOMAH applications and only six applications that have participated in the service have cancelled. The cancellations were due to ineligibilities stated in the initial prescreen review or the property was found to be master metered. The Affordability Prescreen service enables applicants to confidently submit applications that fulfill SOMAH eligibility requirements and helps applicants establish direct contact with the SOMAH PA. Prescreen data is tracked to record project conversion rates into active application submissions and/or prescreened projects where eligibility was confirmed that may need further marketing, education and outreach efforts. Common reasons for ineligibility of documents submitted to the Affordability Prescreen Service have included deed restrictions being expired or having less than 10 years remaining in their compliance period and lack of information within the document to locate the property. AMI restrictions are rarely referenced for ineligibility due to the recent Handbook 8 update expanding affordability requirements[8] and the option to use an income affidavit confirming the property meets the affordability requirements even if not explicitly stated or confirmed in the regulatory agreement. The volume of prescreens and throughput to new application submissions is as follows:

- July 2024–December 2024 — 46 prescreens processed
    - 25 eligible, 2 eligible with income affidavit, 19 ineligible
- January–June 2024 — 31 prescreens processed
    - 14 eligible, 1 eligible with income affidavit, 16 ineligible
- July–December 2023 — 27 prescreens processed

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

- o 8 eligible, 4 eligible with income affidavit, 15 ineligible
- January–June 2023 — 49 prescreens processed
  - o 18 eligible, 9 eligible with income affidavit, 22 ineligible
- September–December 2022 — 34 prescreens processed
  - o 25 eligible, 3 eligible with income affidavit, 6 ineligible

Since the rollout of the formalized prescreen offering, application cancellation reasons have excluded regulatory documentation ineligibility. This process has successfully lessened administrative burdens for both the applicant and SOMAH PA by identifying ineligible projects before they enter the pipeline and require a higher level of administrative effort to manage. Since its launch, the Affordability Prescreen service has identified 76 ineligible regulatory documents prior to application submittal, which was historically the highest reason for cancellation prior to Reservation Approval. This reporting period also recorded a decrease in the number of prescreens deemed "eligible with income affidavit." If the decrease in references made to the income affidavit continues, it will be viewed as a signal that the AMI eligibility updates implemented through Handbook 8 have lessened applicants' reliance on additional documentation being required for program eligibility, further increasing efficiencies and reducing administrative burden for all parties.

Applicants and property owners have also shared valuable feedback for projects that have chosen not to or are unable to move forward with the SOMAH Program after initial application submission. The SOMAH PA solicits additional details from all cancelled and withdrawn applications for tracking and reporting efforts. This feedback has helped the SOMAH PA address eligibility challenges and barriers to program participation via program handbook changes (currently on Handbook 8). Additionally, this cancellation feedback has positioned the SOMAH PA to prioritize outreach to potentially "recoverable" cancelled applications to determine if their needs can be addressed to facilitate future participation. This outreach is discussed further in Section 3.2.4, Property Owners. Applicant and SOMAH PA combined efforts resulted in 31 previously cancelled applications re-entering the program in the second half of 2024.

The SOMAH PA maintains consistent communication with SOMAH contractors who have active applications to understand their project timelines and any potential barriers. This interface with contractors and program participants also helps to support forecasting efforts for program activities as well as tailor project assistance for unique application situations. Over the past year, as application activity picked up for 18-month reservation expiration due dates, extension requests to the Incentive Claim Package deadline remained relatively constant. Q3 2024 had 109 extension requests

received while Q4 had 98 extension requests. The following are the Incentive Claim Package deadline extensions submitted in the previous reporting periods:

- July 2024–December 2024: 207 new extension requests processed
- January–June 2024: 322 new extension requests processed
- July 2023–December 2023: 251 new extension requests processed
- January 2023–June 2023: 243 new extension requests processed
- July 2022–December 2022: 171 new extension requests processed
- January 2022–June 2022: 98 new extension requests processed
- July 2021–December 2021: new 24 extension requests processed

The new extension requests refer to each individual extension request submitted, and applications may have more than one extension request throughout the application process. Each extension request is reviewed and addressed on a case-by-case basis. From program start to date, the average length of an Incentive Claim Package deadline extension request is 142 days. The maximum term per extension request is 180 days. Similar to previous reporting periods, the majority of extension requests cite one of two reasons: changes to the original design layout or funding of the project and problems in the permitting or interconnection process that caused a delay. Utility-related delays, such as long interconnection timelines, difficulty scheduling shutdowns and meter releases and inspection delays, were cited at varying levels of frequency across the SCE, SDG&E and PGE territories, as well as unforeseen engineering challenges. Despite these extensions, the program completed and paid out 103 projects from July through December 2024 with a significant group slated for completion in late 2024/early 2025.

The SOMAH PA uses application milestone deadlines and construction timelines to assess the progress of the application queue and for broader program planning, such as project completion estimates. In the first application step, the Reservation Request Milestone, the applicant is required to enter the project's projected or actual construction start date. This information helps identify where the project is in the life cycle of installation at the time of the SOMAH application. While the construction and interconnection processes are bifurcated from the SOMAH incentive application, the timing of installation and interconnection directly relate to the project's ability to submit for the incentive claim and progress payment (optional). After receiving reservation approval, at the start of each milestone (Energy Efficiency Compliance, Proof of Project and Incentive Claim) applicants are prompted to report if construction has started or update the projected construction start date, if not. As of Q1 2024, applicants are now required to provide the mechanical completion date of a project, which will indicate construction completion. Tracking mechanical completion dates will support the SOMAH PA in understanding the time it takes for a system to receive permission to

operate (PTO). Additionally, the Extension Request Form includes mandatory fields for applicants to provide an updated actual or projected construction start date to ensure quality information, the most up-to-date data capture and further insight into milestone progress. The additional construction start date validation provided via the Extension Request Form improves the accuracy of the data represented in Figure 7. Figure 7 shows the construction timeline information reported in applications through Q4 2024.

Figure 7 – Construction Timeline Insights

Date	Construction Commenced	Projected Construction Start Date
2019	4	0
2020	32	0
2021	77	3
2022	58	6
2023	77	84
Q1 2024	12	24
Q2 2024	3	30
Q3 2024	0	24
Q4 2024	0	13
Q1 2025	0	14
Q2 2025	0	4
TOTAL	263	202

Actual construction start timelines will continue to be updated as data is collected at different milestones in the application process. Throughout Q3-Q4 2024, 207 new extension requests were submitted, all of which contain the construction timeline. The additional data collected in the new mandatory fields shows more projects claiming actual construction start dates over projected construction start dates. In the projects that have submitted multiple extension requests, findings show the later extension requests (most recently submitted) are more likely to have already begun construction instead of providing a projected construction start date. The revised Extension Request Form allows the SOMAH PA to gain more visibility regarding construction timelines, project progression and the necessity for extension requests.

As seen in Figure 7, the number of projects reported to have projected construction start dates in Q3-Q4 2024 increased by 79% from the number of projects in Q1-Q2 2024. Construction timeline projections continued to shift through 2024 as projects progressed and were better able to forecast construction timelines with more certainty. Through feedback provided via extension requests and other direct applicant feedback, the

SOMAH PA anticipates a significant number of projects will enter the project completion phase in the first half of 2025. The 2024 emphasis on closing out existing projects should impact Figure 7 in the next reporting period with many projects in the "Construction Commenced" column moving to completed status.

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

Figure 8 – Current Milestones by IOU Territory

Program	Upfront Technical Assistance	Reservation Request	Energy Efficiency Milestone	Proof of Project Milestone	Progress Payment Pathway	Incentive Claim	Complete/ Incentive Paid
PG&E	20	62	17	75	77	26	140
SCE	2	15	3	35	37	3	73
SDG&E	4	20	3	15	18	1	32
Liberty Utilities	0	0	0	1	0	0	0
PacifiCorp	0	0	0	0	0	0	0
Total	**26**	**97**	**23**	**126**	**132**	**30**	**245**

N = 679

Figure 9 – Percentage of Active Applications by Milestone and Territory[9]
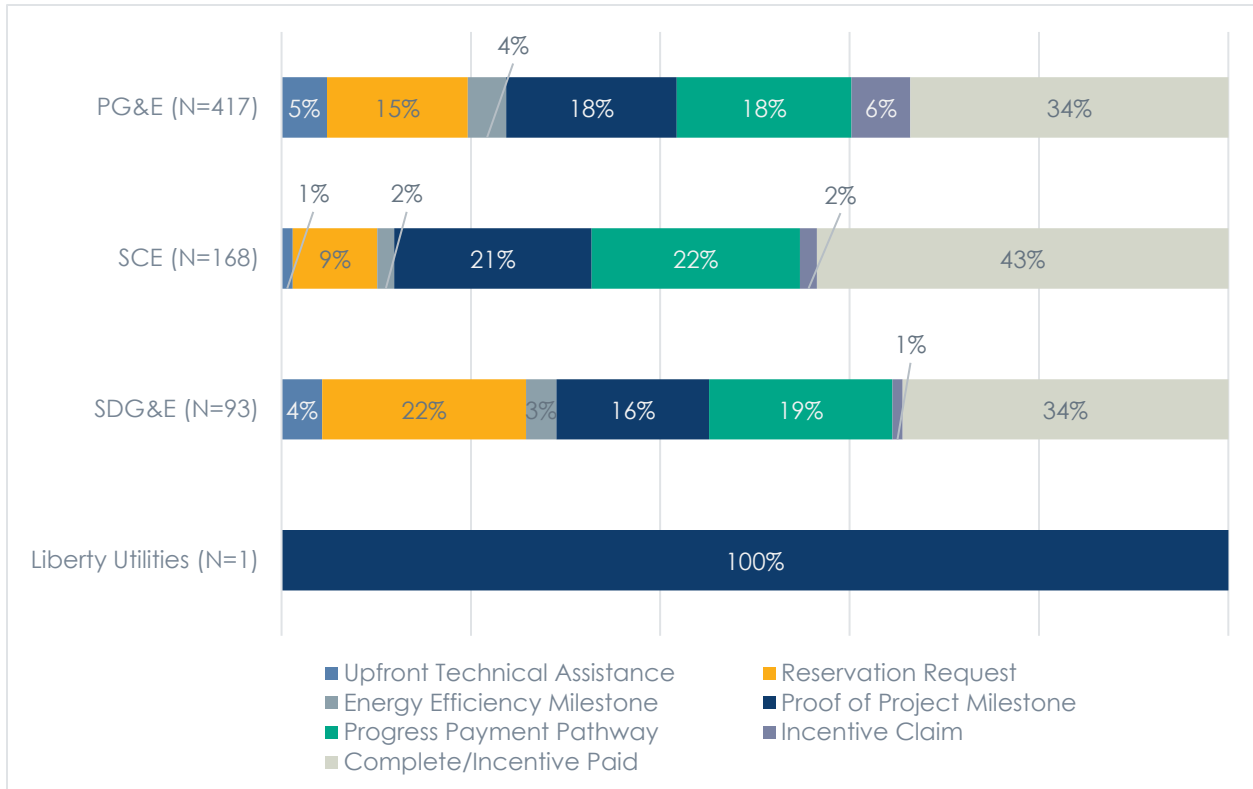
N = 679

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

In Q3-Q4 2024, 10 new Track A applications were submitted. Prior to submitting Track A applications, six of the applications utilized the prescreen service. Of the 10 Track A applications working with the SOMAH PA to submit the documentation required for the Upfront Technical Assistance stage in PowerClerk, seven are suspended awaiting

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

additional documentation from the property owners and three are pending review. The lengthier review process for Track A projects can be attributed to the additional support property owners require during the SOMAH application process as they familiarize themselves with the program requirements, platforms, etc. The SOMAH PA works with property owners to ensure they receive guidance through every part of the Track A application process. More information can be found in Section 3.5, Technical Assistance.

Figure 10 – Applications by Incentive Track since Program Start

Assigned Incentive Track	Active	Complete/ Incentive Paid	Cancelled/ Withdrawn	**Total**
Track A	31	2	46	**79**
Track B	403	243	331	**977**

N = 1,056

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

- Income-Qualified: 66% of property residents have incomes at or below 80% AMI as determined by the California Department of Housing and Community Development.
- DAC: The property is located in a disadvantaged community (DAC) as identified by CalEPA.
- Tribal Ownership: The property is owned by a California Native American tribe.[10]
- Public Housing Authority: The property is rental housing property that is owned by a public housing authority or public housing agency.[11]

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

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

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

Figure 11 – Overall Property Eligibility Pathways
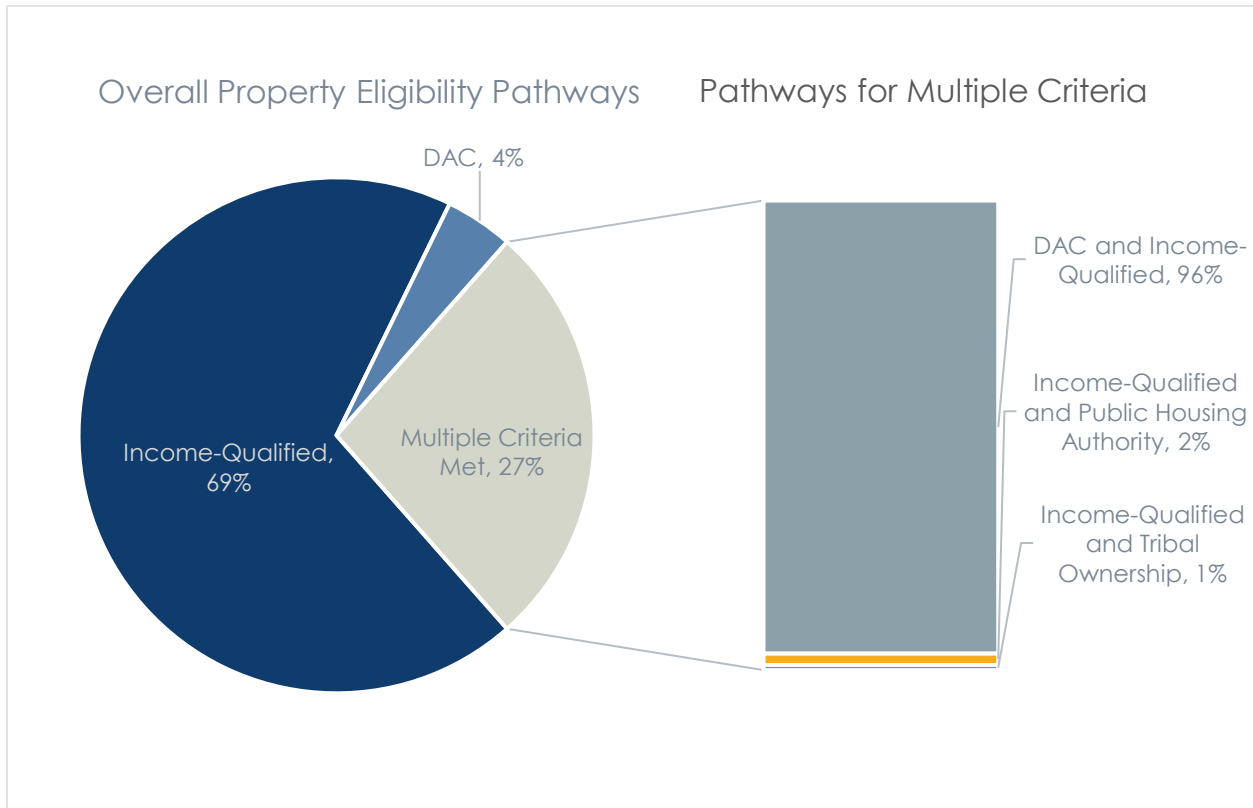
Of the 679 active applications[12] received, approximately 68% qualified through only the income pathway, approximately 3% qualified through just the DAC pathway and approximately 29% qualified for the program through multiple criteria met. In the first two years of the program, participation of DAC projects fluctuated between 25-30% of SOMAH projects. At the close of this reporting period, the overall percentage of all applications located in DACs rose slightly from 29% to 31%, staying within previous ranges for this statistic.

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

Figure 12 – Property Eligibility by Incentive Track [13]
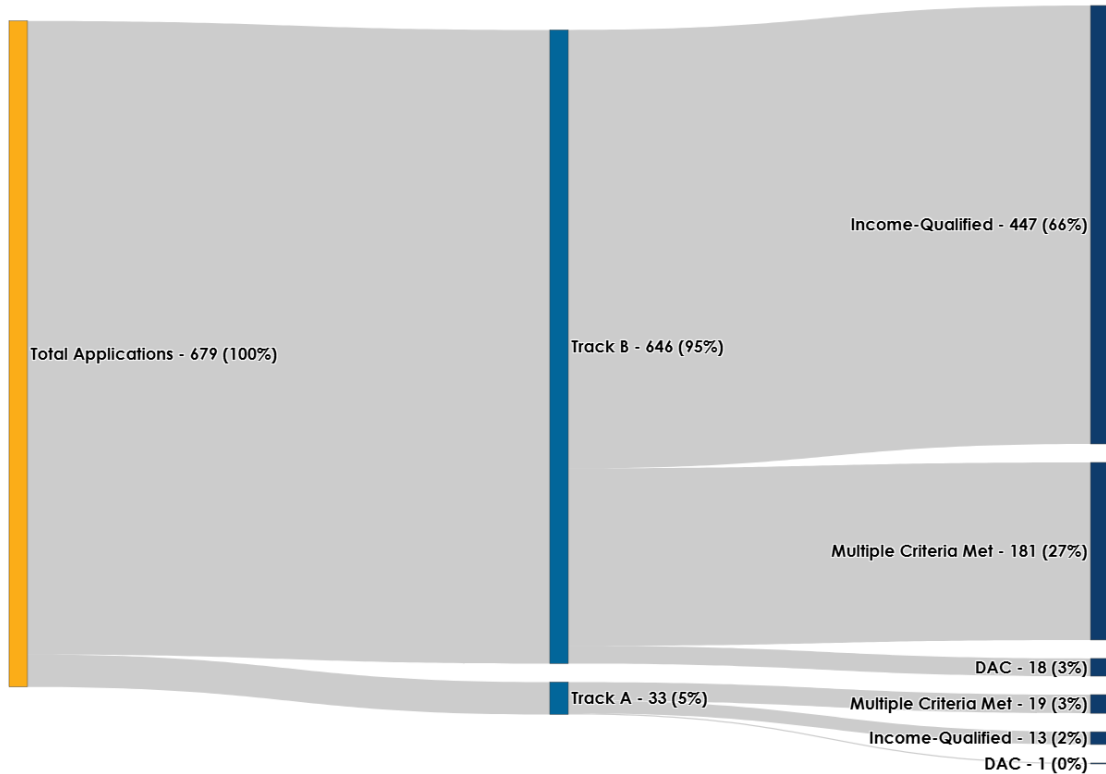
Figures 13 and 14 further break down the property eligibility statuses by count and percentage to highlight the number of DAC and Tribal Ownership-qualifying properties.[14] The SOMAH PA continues to consider ways to increase participation for DAC-qualifying properties and will continue work to meet the benchmark and support overall program goals. Two impactful updates that have supported increasing DAC project participation in SOMAH are the Handbook 5 update to uphold eligibility for otherwise eligible properties within both the current and immediately previous version of the CalEnviroScreen and the inclusion of federally recognized tribal lands as part of the

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

CalEnviroScreen DAC designation. Both updates support additional potentially eligible properties to qualify for SOMAH through their DAC status.

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

Figure 13 – Property Eligibility by Reservation Status since Program Start

Property Eligibility	Pending Reservation Approval	Reservation Approval Received	Complete/ Incentive Paid	Cancelled/ Withdrawn
Multiple Criteria Met	37	99	64	85
DAC	2	12	5	26
Income-Qualified	46	238	176	265
Tribal Ownership	0	0	0	0
Public Housing Authority	0	0	0	0
Data not reported	0	0	0	1

N = 1,056

Figure 14 – Property Eligibility by DAC/Tribal Ownership Status since Program Start
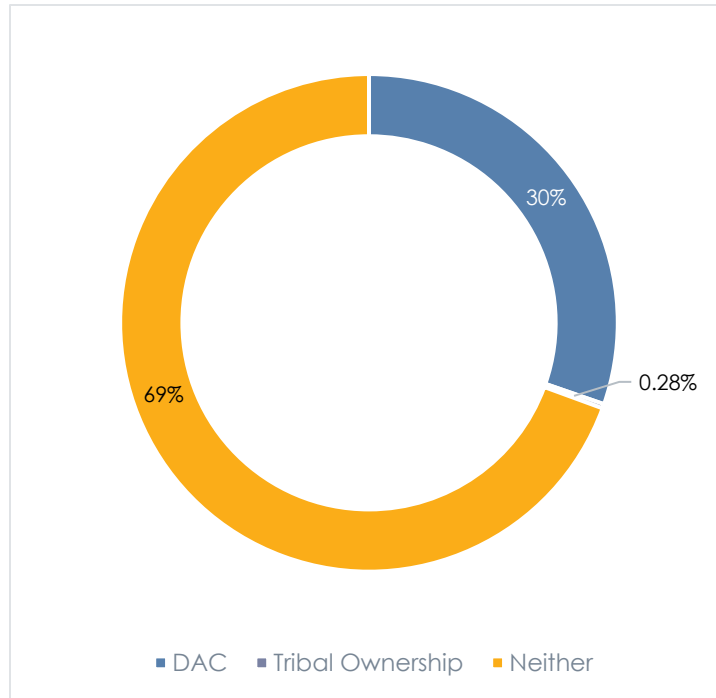
N = 1,056

The Reservation Request Milestone is the application entry point for Track B projects, the majority of SOMAH's application pipeline, and the second application step for Track A projects. The Reservation Request Package is a robust and distinguishable milestone for all projects to complete. Split into Phase I and Phase II, the Reservation Request Package includes up to eight required documents and an application deposit (for nonpriority groups) before achieving reservation approval in Phase II of the Reservation Request Milestone. The three main components of the Reservation Request Milestone are: 1) eligibility verification through review of the associated eligibility documentation; 2) IOU data request for consumption data and system sizing; and 3) the application deposit (for nonpriority groups.[15]) before issuing a reservation approval. This approval is an important achievement for projects and for programmatic data and milestone tracking.

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

As depicted in Figure 13, at the close of Q4 2024, there were 85 applications yet to receive reservation approval. Track A applications that have not yet submitted a reservation request account for 26 of the 85 applications. The remaining 59 applications are in the Reservation Request Milestone and of those, 12 applications are currently in Processing Data Request status, in Data Results Shared status or Pending Application Deposit status before receiving final reservation approval. The remaining 47 applications are in Reservation Request Submitted, Pending QA, Suspended or Review status. Most of the program's applications have passed the Reservation Request Milestone; 349 applications have received reservation approval, and 245 are completed and paid projects.

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

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

The annual ESA referral data request is a rolling list of completed projects. Since 2021, the IOU reporting captured ongoing efforts of ESA Common Area Measures and in-unit engagement for SOMAH projects. As of 2024, the IOU reporting will capture Multifamily Energy Savings efforts for SOMAH projects. The SOMAH PA will collect reportable feedback for the 2024 annual ESA referral data request in Q1 2025, enabling the PA to

report on a full year's worth of data. Results and summaries of the available information on completed projects will be reported in the July 2025 progress report. The SOMAH PA will continue to collect ESA data on completed projects on an annual basis.

Figure 15 – System Ownership Type
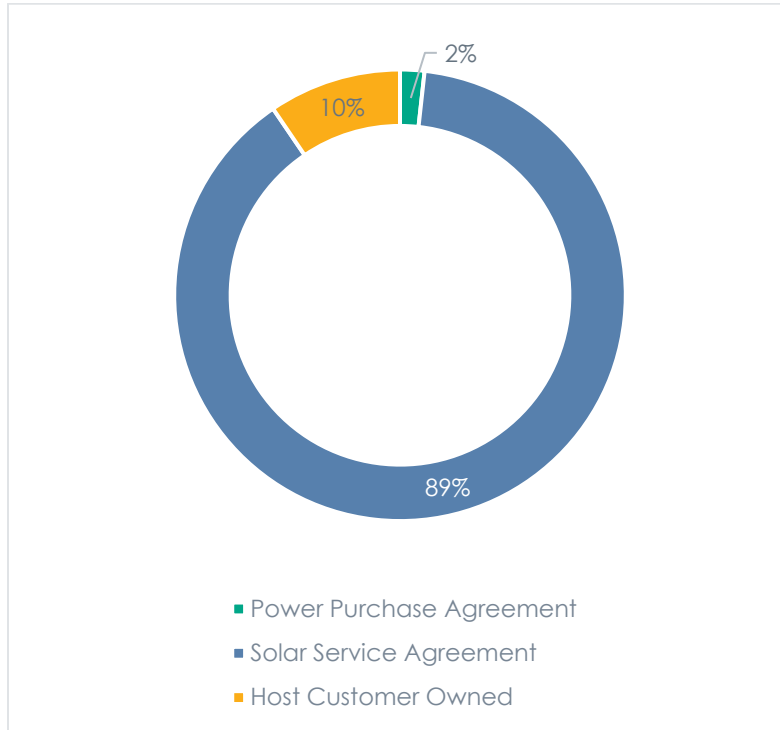
N = 631

As Figure 15 shows, the majority of SOMAH projects, 89%, are Solar Service Agreement (SSA) systems, similar to what some contractors term power purchase agreements (PPAs). With Handbook 5, the SOMAH PA began differentiating contract types between SSAs and PPAs to capture the most accurate information based on the solar PV contract. Feedback shared by past third-party program evaluations, and by both property owners and contractors, suggests the third-party ownership option is more financially feasible for property owners given the minimal upfront costs associated with this arrangement. Additionally, some contractor companies have preferred system financing/ownership options for their installations, which is a likely influence on the system ownership breakdown for the current application queue. The SOMAH PA has continued to engage with interested parties to support additional PPA providers approved for the program. Additional information on PPA providers can be found in Section 3.2.3, Contractors.

Figure 16 – System Ownership Type by Property Eligibility
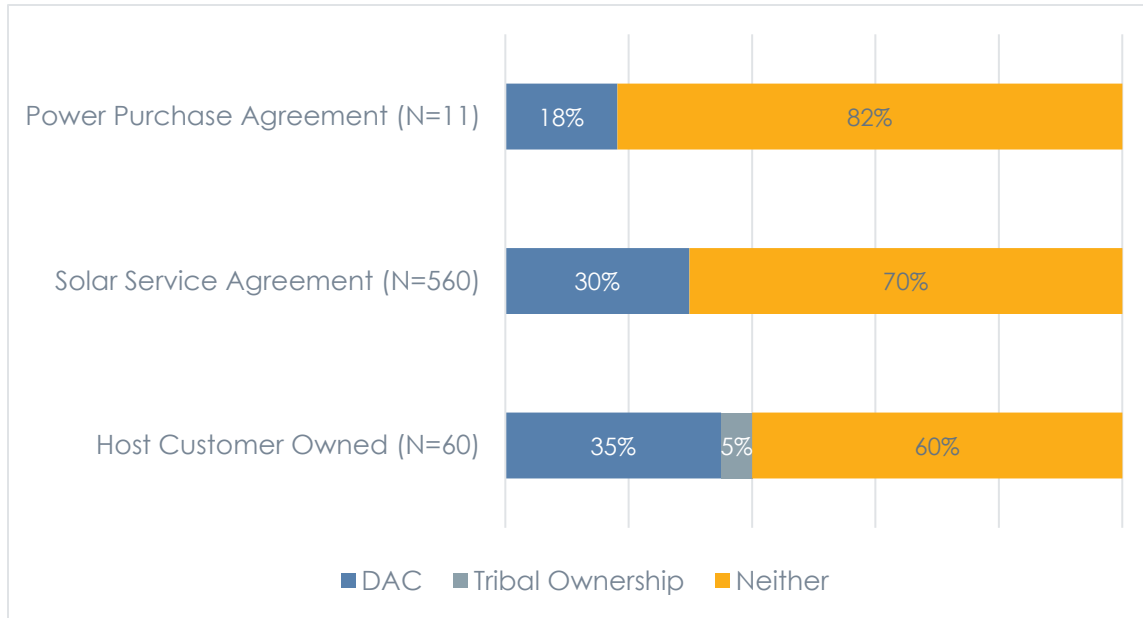
N = 631

Figure 16 further segments system ownership types by DAC, Tribal Ownership or neither DAC nor Tribal Ownership properties. Figure 16 illustrates that 35% of host customer owned systems are reported to be installed in DACs and another 5% at tribal-owned properties. In comparison, 30% of solar installations in DACs have entered an SSA. The data shows that DAC and tribal-owned properties are more likely to purchase their solar systems than enter into an SSA or PPA.

Figure 17 – Application Reservation Status by Incentive Track[16]

Total Applications - 679 (100%)

Track B - 646 (95%)
- Reservation Approval Received - 344 (51%)
- Complete/Incentive Paid - 243 (36%)
- Pending Reservation Approval - 59 (9%)

Track A - 33 (5%)
- Pending Reservation Approval - 26 (4%)
- Reservation Approval Received - 5 (1%)
- Complete/Incentive Paid - 2 (0%)
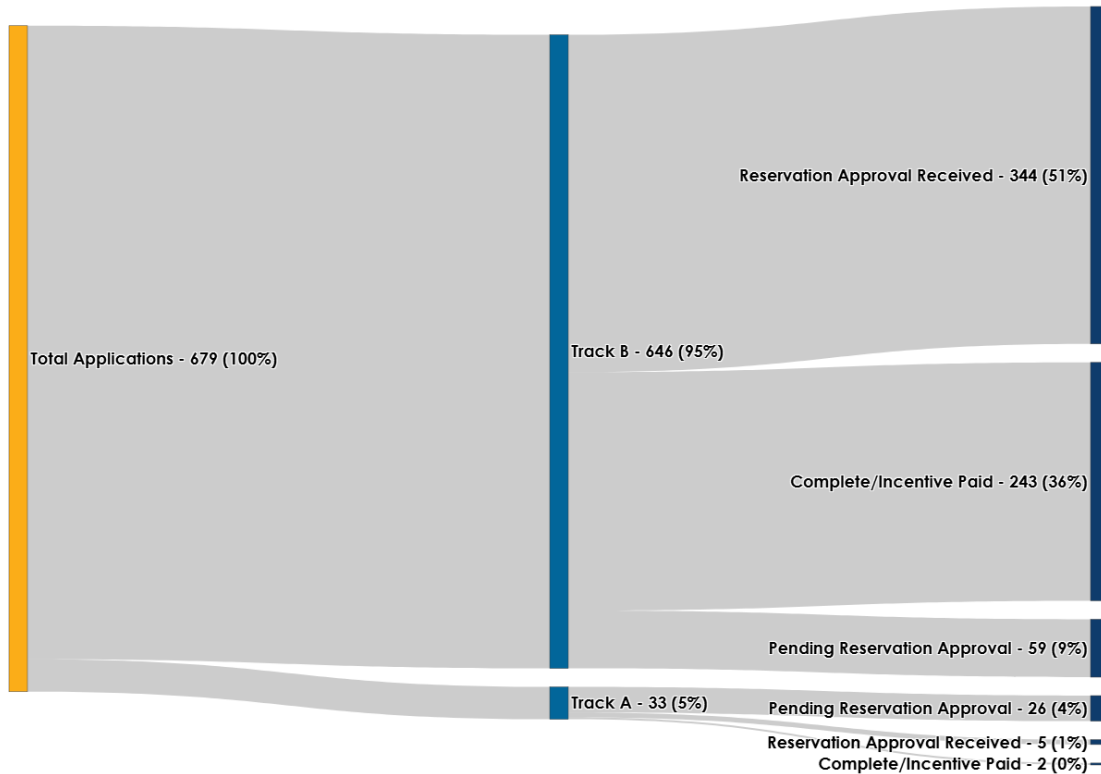
See Appendix A for a full list of application statuses and descriptions.

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.
- Pathway 2 – One of the following:
  - Recent or active participation in an approved whole-building energy upgrade program.

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

- o Documentation of a recent California Tax Credit Allocation Committee rehabilitation.
- o Documentation that the property was completely constructed under a recent version of Title 24.

To accommodate COVID-19 challenges with completing Pathway 1, whole-building walk-through audit, the SOMAH PA introduced the EECM Postponement option in early July 2020 as a temporary program response, allowing projects that received reservation approval to postpone submitting their EECM documentation up to submission of the Incentive Claim Milestone. At the Q2 2021 Public Forum, the SOMAH PA announced an end to the EECM Postponement option effective September 13, 2021, and continued to honor projects that were approved for postponement with no impacts to those project timelines. As projects continue to progress toward project completion, the postponed EECM documentation is submitted to and reconciled by the SOMAH PA. In the second half of 2024, the majority of outstanding applications in EECM postponement advanced toward project completion and fulfilled the EECM requirement. Of the 277 applications that have participated in EECM postponement only 29 are left that have yet to fulfill these requirements. The SOMAH PA anticipates the remaining applications with EECM postponement will be submitted and reach the Incentive Claim Milestone by the end of 2025.

Completing application milestones is a critical step in the application process and important for collecting valuable program data. In this reporting period, the program has applications in all stages of application, construction and completion processes representing each of the program's four application milestones (plus the fifth optional milestone, Progress Payment Pathway.[17]). The Reservation Request and Energy Efficiency Compliance Milestones are important steps in determining project eligibility and the eligible system size, as they consider consumption history and available energy efficiency upgrades. Proof of Project and Incentive Claim Milestones provide information on the contracted and executed system as well as proof of compliance with the program's job training and tenant education requirements.

At the close of Q4 2024, 30 projects are currently working through the Incentive Claim Milestone. Of those Incentive Claim projects, 24 are in the inspection phase, two are pending IOU approval and four are in suspended status awaiting corrections. Based on

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[17] Per D.24-11-006, the Progress Payment Pathway will become default with an option to opt-out. This change will be implemented through a forthcoming handbook change in 2025.

application timelines and reporting progress, the SOMAH PA anticipates an increase in projects moving toward incentive payment in the first half of 2025.

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

N = 653

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. 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	Cancelled/ Withdrawn
PG&E	157.4	140.8	104.7	177.6
SCE	150.7	183.2	186.8	210.5
SDG&E	117.6	132.8	147.8	151.9
Liberty Utility	0.0	55.2	0.0	93.2
PacifiCorp	0.0	0.0	0.0	111.6

N = 985

Figure 20 – Distribution of System Sizes (kW)
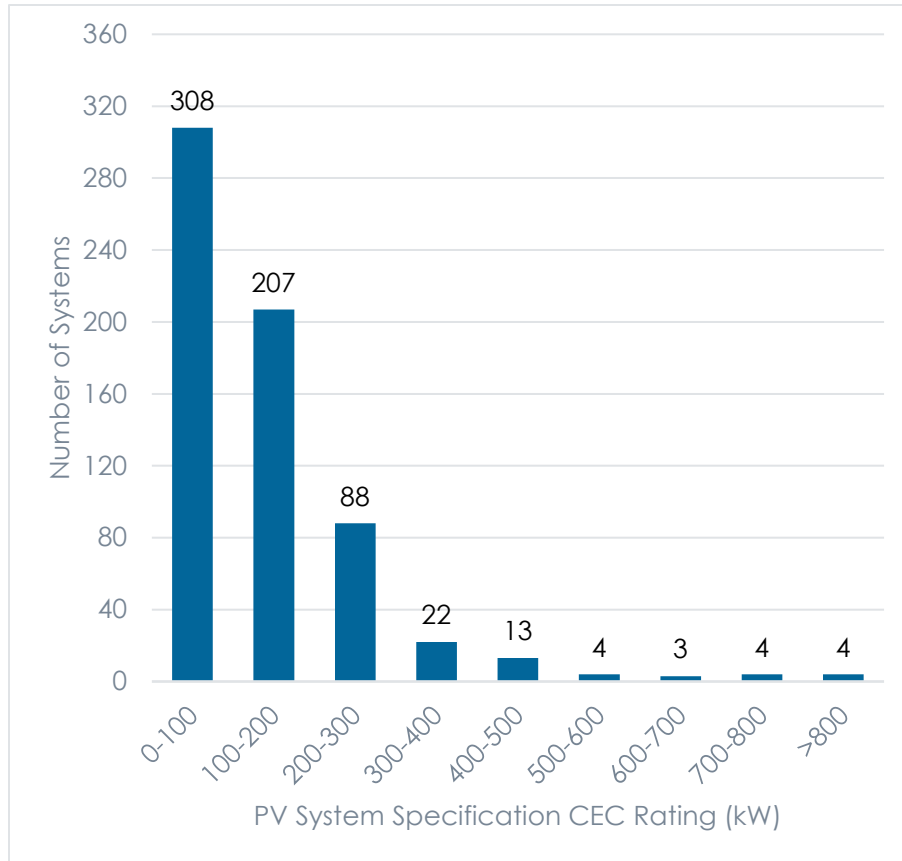
N = 653

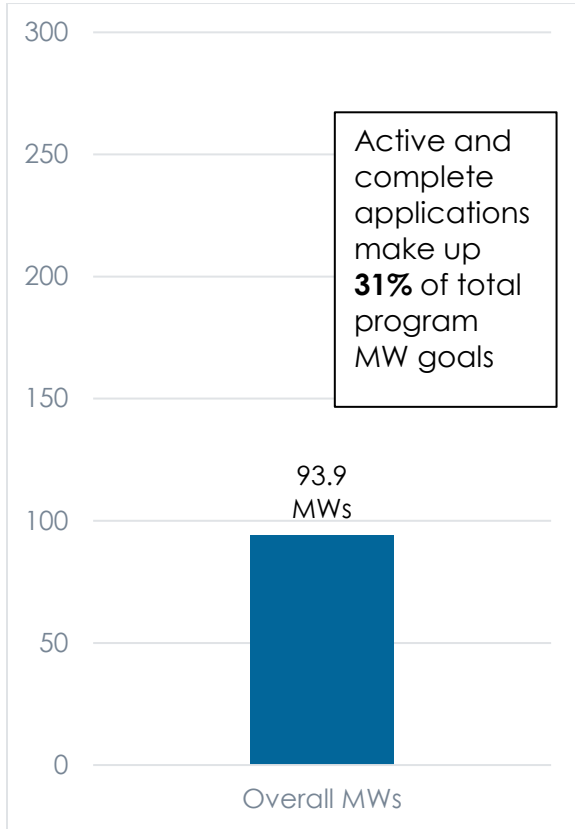From the projects with approved reservations, application data from PowerClerk shows projects reduce their system size by an average of 37% from initial submission. The trend to reduce the system size after IOU consumption data sharing (post-reservation submittal and pre-reservation approval) continues. However, application data from PowerClerk also shows newer projects (submitted in 2021-23) are trending with smaller adjustments overall. Of the 57 applications that reached reservation approval in Q3-Q4 2024, 21 projects adjusted their system size during the Reservation Request Milestone, while the remaining 36 maintained their originally submitted system size through reservation approval. Of the 21 projects that adjusted system size, six projects increased the system size from what was originally submitted, a different trend from previous years. Due to available program funds and lack of a waitlist, contractors have more flexibility when submitting a SOMAH application and use the Reservation Request Milestone to fine-tune their system size prior to signing the Reservation Request Form.

![SOMAH logo]

Figure 21 – Progress to 300 MW

Figure 22 – Percentage of Program MW by Reservation Type

Active and complete applications make up **31%** of total program MW goals

93.9 MWs

Overall MWs

N = 653

- Pending Reservation Approval
- Reservation Approval Received
- Complete/Incentive Paid
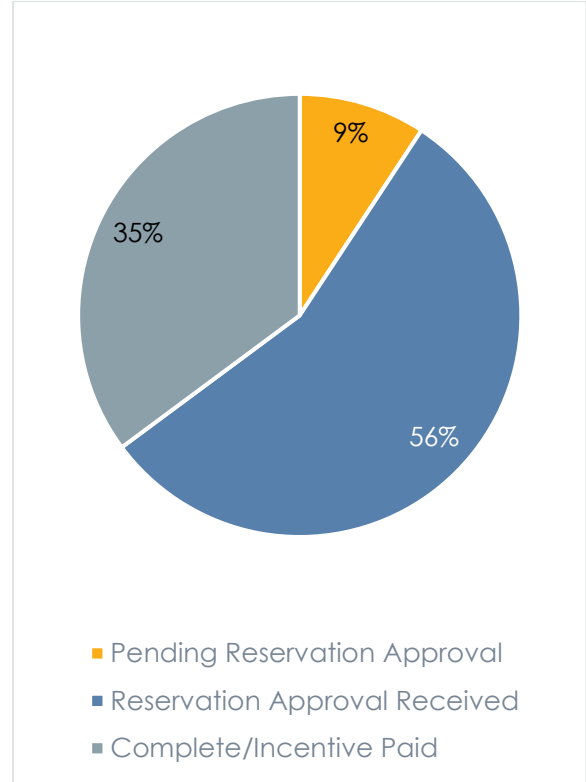
N = 653

Additionally, the average system cost is $4.27/watt CEC-AC.[18] with a total expected aggregated annual output of 100,600,268 kWh.[19] for the active.[20] SOMAH projects in queue. Completed projects made up 35% of total application volume at the close of Q4 2024. This percentage remains consistent with the ratio of active to completed applications at the end of 2023, illustrating a continuation of the 2023 trend that reported the number of new applications and the number of completed projects increasing proportionally. The percentage of pending reservation approval projects increased from 7% at the end of 2023 to 9% at the close of this reporting period. The increase in the percentage of applications awaiting reservation approval is likely due to the recent uptick in the number of new reservation requests.

Figures 23 and 24 show the geographic distribution of property locations for applications received and completed projects to date. A more detailed view is provided for higher density project regions in the San Francisco Bay, San Diego and greater Los Angeles areas.

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[18] 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.

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

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

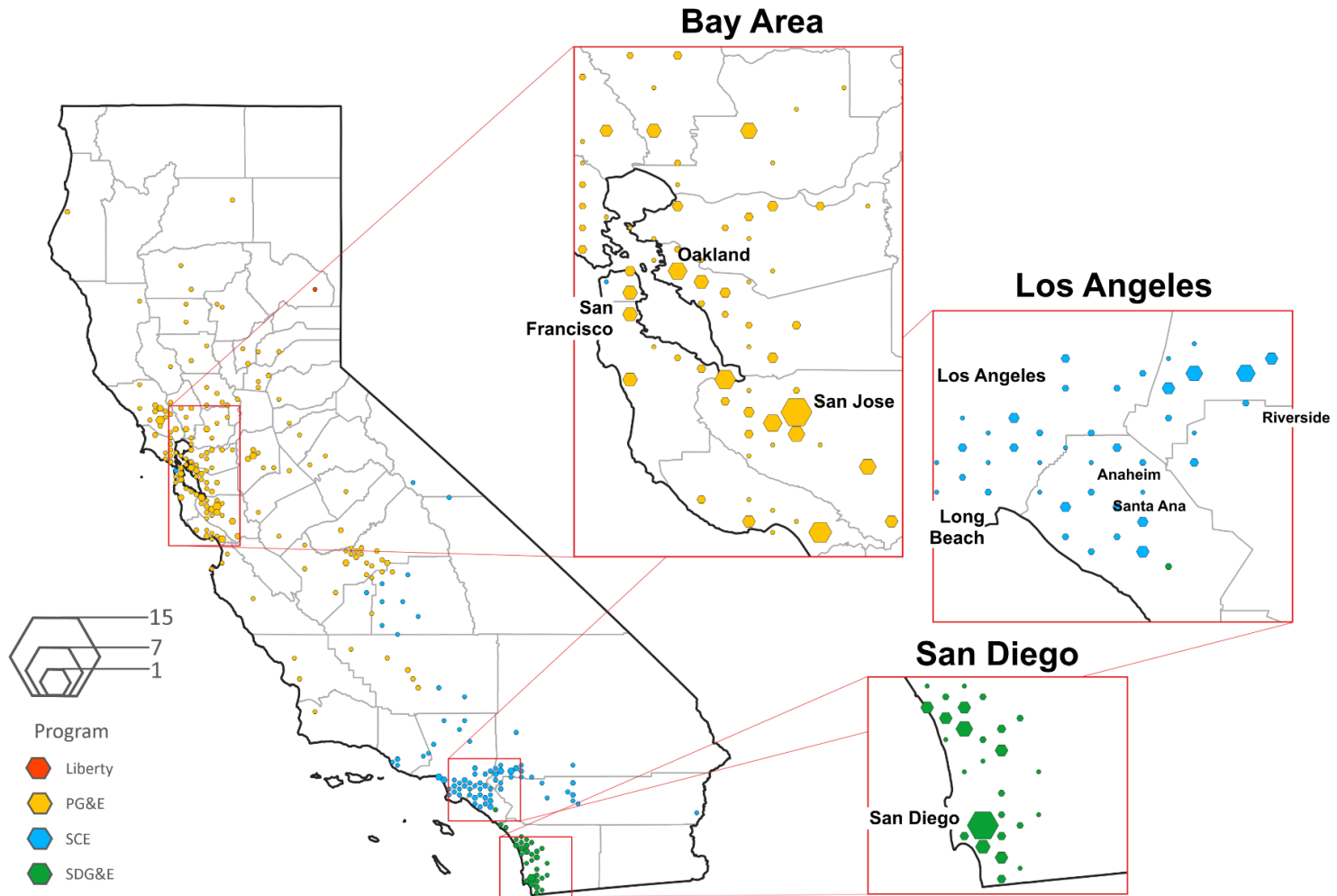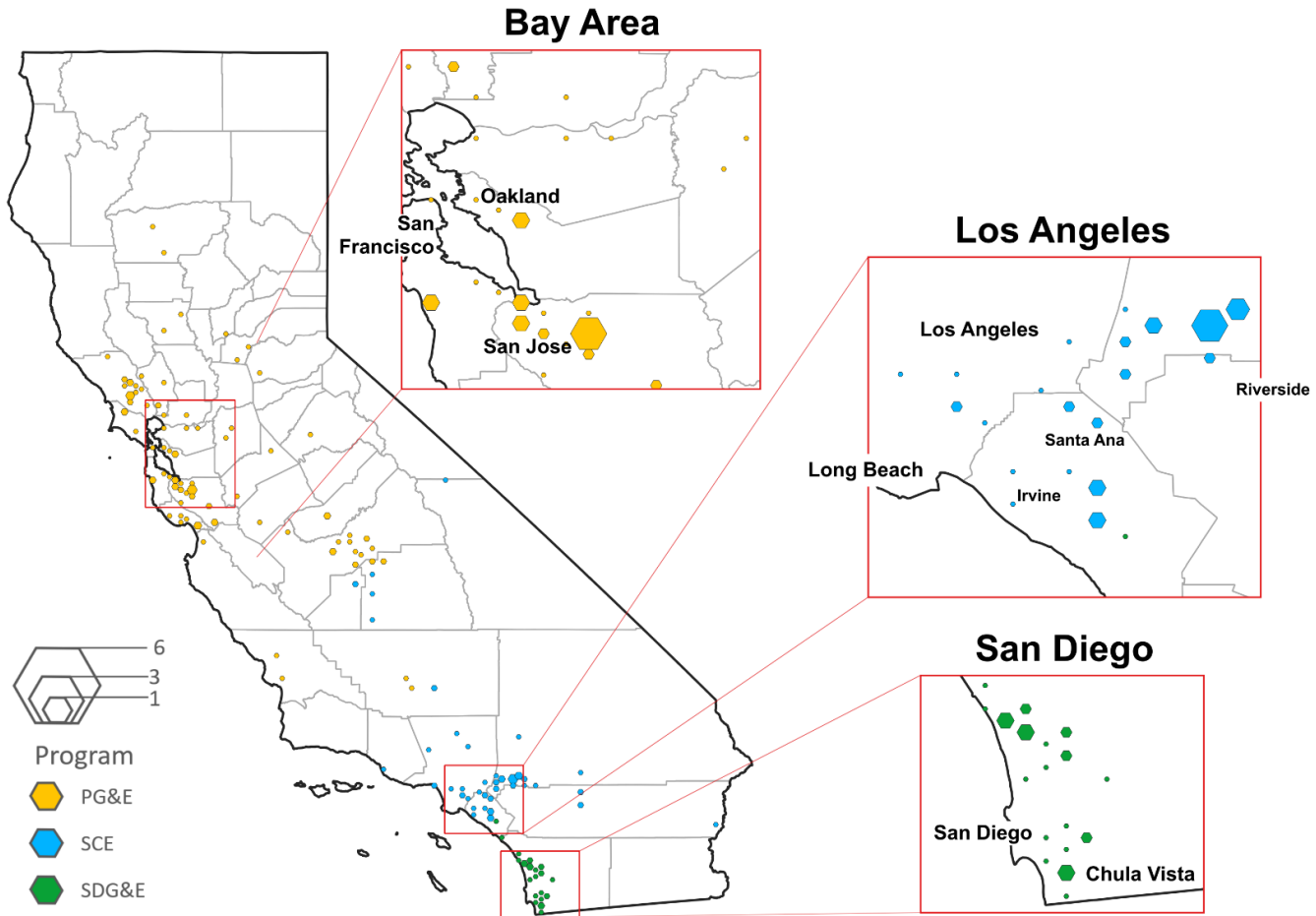**Figure 23 – Active Project Density and Location Visualizations**

Figure 24 – Completed Project Density and Location Visualization

3.1.2 Program Payments

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

As highlighted in Figure 25, 315 applications opted in to the Progress Payment Pathway, amounting to $90,964,340 in paid out incentives. As a result of the popularity of the Progress Payment Pathway and to streamline the administrative process, progress payments will become the default option pursuant to D.24-11-006. Projects will be able to opt-out and pursue a single, final payment if a project chooses to, and the program requirements for the progress payment will not change. Further information can be found in Section 4.2.1, Decision 24-11-006.

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

Upon launching the progress payment offering, additional data fields were added to the working data set on the California Distributed Generation Statistics website that indicates an approved opt-in to the Progress Payment Pathway and the resulting progress payment amount. Since launching the Progress Payment Pathway in April 2021, the offering's popularity has continued to increase over time, now totaling 315 projects in four years of availability. The program's progress payment history is summarized by the payment list below:

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

The increase in progress payments year after year has remained consistent throughout its launch. After its first year, 2022 had 50 additional progress payments issued, and 64 additional progress payments were issued in 2023. Q3-Q4 2024 registered 94 additional progress payments, resulting in 2024 issuing a total of 193 progress payments, the most so far in a year. In total, 148 of the projects that enrolled in the Progress Payment Pathway have reached the Incentive Claim Milestone and have received their final incentive payment. The timeline for these projects shows the progress payment allowed participants to receive the benefit of a partial incentive payment, on average, eight months prior to their final incentive payment. This timeline supports the SOMAH PA's goal to alleviate financial barriers and support project viability.

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

- July–December 2024: 71 progress payment requests received
- January–June 2024: 112 progress payment requests received
- July–December 2023: 53 progress payment requests received
- January–June 2023: 22 progress payment requests received
- July–December 2022: 13 progress payment requests received
- January–June 2022: 28 progress payment requests received
- July–December 2021: 9 progress payment requests received
- April–June 2021: 4 progress payment requests received

More than half (56%) of applications eligible to receive the two-payment pathway have opted into progress payment. At the end of Q4 2024, of the eight contractors with completed projects, five of the contractor companies have used the Progress Payment Pathway at least once. By advertising progress payment to contractors and many projects reaching mechanical completion, the use of the Progress Payment Pathway remained consistent in Q3-Q4 2024 and is expected to continue increasing in 2025. Figure 25 outlines details for the payment program since its launch with a summary of the number of progress payments and standard payments issued and the applicable associated dollar amounts.

Figure 25 – Program Payment Statistics.[21]

Program	Progress Payments Issued	Progress Payment Amount	Final Incentive Payments Issued	Final Incentive Payment Amount	Total Incentive Payment Amount
PG&E	211	$30,533,974	133	$14,639,506	$45,173,481
SCE	68	$15,563,743	66	$18,861,299	$34,425,042
SDG&E	36	$5,515,915	30	$5,849,903	$11,365,817
Liberty Utility	0	$0	0	$0	$0
PacifiCorp	0	$0	0	$0	$0
Total	**315**	**$51,613,632**	**229**	**$39,350,708**	**$90,964,340**

With the uptick in progress payments, there has also been a dramatic increase in inspections and progress completion, resulting in a high number of final incentive payments throughout Q3-Q4 2024. Q1 and Q2 had a lower volume of project completion across PG&E, SCE and SDG&E territories with only 29 inspections. In comparison, Q3 resulted in a dramatic uptick with 40 inspections, more in one quarter than the whole first half of 2024. This higher volume of activity continued through the end of year with Q4 reaching 71 more completed inspections plus 24 more projects that were in the process of being scheduled and inspected at the close of the reporting period.

Mirroring the uptick in inspections, there was also increased final payment activity in this reporting period with 103 projects in Q3-Q4 2024 receiving final incentive payments. This

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

reporting period had more final incentive payments issued than in all program history. In total, 229 projects have received their final payment, and 65% of those projects opted for a progress payment. The program's first final payment was issued in Q4 2020, and there was a 6-month gap in payments in the beginning of 2021. Payments picked up in the second half of 2021, and from then on, final payments have consistently been issued. With the increase in progress payments in Q3-Q4 2024, more than half of the projects that received their final payment have chosen the two-payment pathway rather than the standard one-payment option. The program's cumulative final payment history leading up to 229 final payments is summarized below:

- December 2024: 229 final payments issued
- June 2024: 127 final payments issued
- December 2023: 109 final payments issued
- June 2023: 98 final payments issued
- December 2022: 77 final payments issued
- June 2022: 38 final payments issued
- December 2021: 14 final payments issued
- June 2021: 0 final payment issued
- December 2020: 1 final payment issued

In Q3-Q4 2024, 94 projects received a progress payment, and three of those projects received a final incentive payment. Not all the reported projects have completed installations and received the final incentive payment as shown in Figure 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 on 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.

Increased Incentive Reporting

As of December 31, 2024, 232 projects of the maximum 306 eligible applications submitted the required supporting documentation and were fully approved for the increased incentive offering to existing applications that resulted from Handbook 7. To date, projects that received the revised incentive had an average 12% increase in total incentive. Compared to the pre-revised incentive amounts, over $14.2 million more in incentive funding was allocated to applications that had their revised incentive requests fully approved. The SOMAH PA expects the remaining eligible conditionally approved applications to receive higher incentives in 2025 given the milestone deadlines for the relevant applications.

Application Deposits

The electronic payment option for application deposits has become a very popular option for participants, which was a motivation for the SOMAH PA to streamline other payment and incentive claim processing. The electronic payment offering started with application deposits and was further extended to progress payments and final incentive claim payments. At the close of this reporting period, all but eight incentive payments and 19 deposit fee refund payments issued were via electronic payment method.

Clarification provided by the SOMAH PA's June 2024 Advice Letter 153-E outlines that previously forfeited application deposits may be re-used only for cancelled projects that re-enter with a new application, and only up to the total dollar amount of the prior application deposit. The clarification of the ability to re-use forfeited deposits for project re-entry was made to further address participation barriers and financial burden for program participants, while still retaining the programmatic benefit the deposit requirement brings to elevating the quality of incoming applications. This additional detail is reflected in the Application Process and Documents section of the SOMAH website under the Application Deposits tab. In Q4 2024, the first requests for deposit re-use were received. In total, in 2024, three forfeited application deposits, totaling $12,500, have been re-used. Forfeited deposit re-use represents a tangible removal of a program re-entry barrier for projects that are restarting. With previously cancelled projects now having the option to re-use forfeited deposits if they re-enter the program, the PA will continue to report on deposit re-use and its relation to cancelled application re-entries reported on in Section 3.1.1, Applications and Incentive Statistics and related outreach efforts are reported on in Section 3.2.4, Property Owners.

3.1.3 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 can be used to meet the multiple bid requirement for Track A projects. The online bidding tool maintains a repository of eligible SOMAH contractors who have completed the Contractor Eligibility Training webinar and registered their primary contact information with the SOMAH PA.

The online bidding tool allows the host customer to request a bid from up to eight contractors of their choice. This encourages the host customer to conduct basic research on contractors ahead of time. After the host customer's selection of bidders, the bidding tool notifies the eligible SOMAH contractors, who then can accept or decline the bid request. If the contractor accepts the bid request, they can contact the host customer to begin preparing a site-specific bid proposal. Once all contractors

who accepted the bid request have completed and submitted proposals, the tool aggregates basic information about the proposals 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. Whereas contractors have unique proposal generation tools and layouts with different underlying assumptions, SOMAH's requirement of a standardized Project Bid Form harmonizes the detailed elements of a proposal into a consistent format containing objective and verifiable information. To provide the most accurate and best user experience, the SOMAH PA reviews the online bidding tool weekly to engage unresponsive contractors, perform outreach to contractors with expired licenses and remove contractors with suspended licenses.
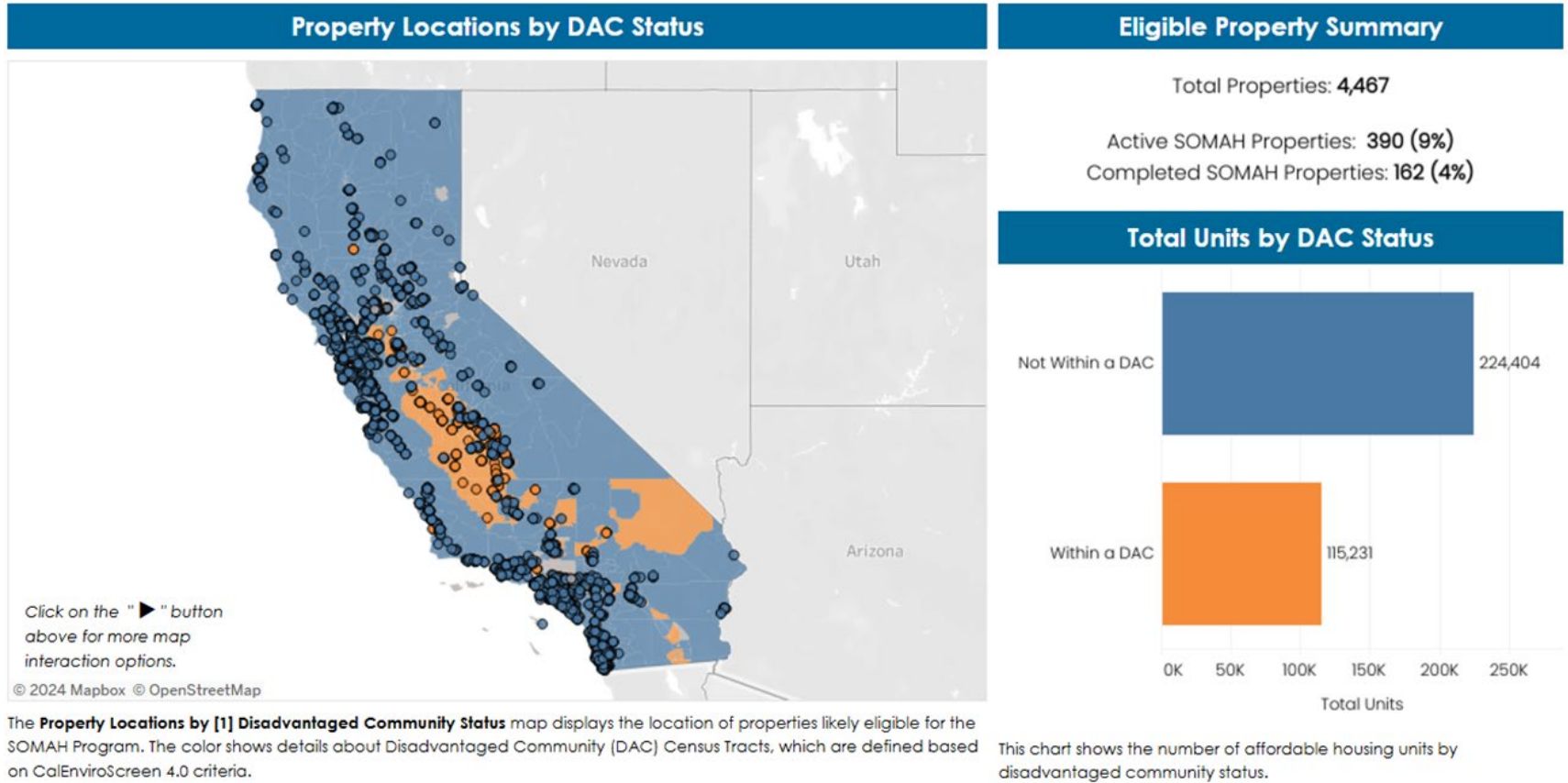
Although there was no new activity with the bidding tool in Q3-Q4 2024, several property owners still obtained multiple bids by directly communicating with contractors rather than using SOMAH's bidding tool. The lower engagement volume of the bidding tool limits the amount of meaningful feedback and data available at this time. However, the SOMAH PA looks forward to reporting bidding 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. In Q3 2024, the PA created an Eligible Properties Map Guide to provide direction on interpretating and utilizing the map for stakeholders. This public resource can be found on the Eligible Properties Map page. The map webpage received over 884 page views in Q3-Q4 2024.

Map data is based on data from the California Housing Partnership's Preservation Clearinghouse, which includes HUD-subsidized properties, USDA Section 515 rural properties, properties financed with Low-Income Housing Tax Credits and local funding sources. The map is designed for use by SOMAH participants and stakeholders, especially solar contractors. The SOMAH PA intends to update the underlying map data for potentially eligible SOMAH properties annually. This year's update to underlying map data was completed on April 15, 2024. Data on properties with active SOMAH applications was most recently updated on October 1, 2024. The interactive visuals show multifamily affordable housing as well as current SOMAH applications, allowing users to filter by county, city, ZIP code, street address, SOMAH status, total units, senate and assembly district, main SOMAH eligibility requirements, legislative districts and utility territories. The map provides color coding based on a property's location in CalEnviroScreen-defined disadvantaged communities, electric utility territories, legislative districts and county.

Figure 26 – Eligible SOMAH Properties Map

Property Locations by DAC Status

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

© 2024 Mapbox © OpenStreetMap

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

Eligible Property Summary

Total Properties: **4,467**

Active SOMAH Properties: **390 (9%)**
Completed SOMAH Properties: **162 (4%)**

Total Units by DAC Status

	Total Units
Not Within a DAC	224,404
Within a DAC	115,231

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

3.1.5 California Distributed Generation Statistics

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

The working data set continues to be a frequently used resource for program stakeholders and participants to glean insights on program progress and trends. Program data from the working data set also populate data visualizations on the SOMAH Statistics and Charts page of the California Distributed Generation Statistics website. Eleven charts and graphs are currently displayed on the page covering essential program metrics and participation statistics. With the increased activity for project completion over the past year, these charts and graphs have continued to provide valuable data highlighting the noteworthy impacts of completed SOMAH projects. Section 4, Program Planning and Development, further elaborates on additional public reporting and transparency measures of the SOMAH Program.

3.2 Marketing, Education and Outreach

As the SOMAH Program increases the number of completed projects, the PA's audience engagement has emphasized storytelling through success stories, blogs and social media posts. Activities have included planning ribbon-cuttings, in-person events and improved resources and tools. The program celebrated many successes during this reporting period, as outlined by each audience type below. ME&O efforts were guided by the PA's 2024 ME&O Plan and focused on: 1) outreach to property owners and federally recognized tribes; 2) efforts to increase applications by new contractors and subcontractor participation; 3) providing job trainee opportunities and promoting job trainee participation; 4) increasing in-person tenant education workshops; and 5) increasing stakeholder co-marketing partnerships.

3.2.1 ME&O Plan

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

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

Drafting of the 2025 ME&O Plan is underway as of this reporting period. Overall, the SOMAH PA plans to keep many of the ME&O goals the same as in previous years. Tactics and efforts that have proven successful will continue, while adjustments will be made toward any challenge areas and to incorporate updates to key performance indicators (KPIs) and reporting on CBO partnerships, as well as any other items related to ME&O outlined in D.24-11-006.

3.2.2 Monitoring, Evaluation and Research

The SOMAH PA uses mixed methods to monitor and evaluate ME&O efforts, including surveys, qualitative interviews, program data analysis, reporting and transparency activities. Research efforts are determined by the PA based on the program implementation plan, handbook, annual ME&O plans and other ongoing needs. The objectives of SOMAH Program participant research are:

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

Surveys are issued to all SOMAH audiences at various stages, from ME&O outreach efforts through the application process to post-application. Feedback from surveys of SOMAH key audiences is used to inform ongoing ME&O outreach efforts and the application process. See Figure 27 for a summary of planned and completed surveys. Some surveys previously reported on have been removed to showcase the most relevant and recent program activities. In addition to surveys, the SOMAH PA began

conducting future-focused research. This research is designed to: 1) identify opportunities to increase diverse contractor participation in SOMAH as prime or subcontractors; 2) spot opportunities to increase overall property owner participation; 3) evaluate program retention; and 4) understand the market for SOMAH. These research projects are outlined in Figure 27.

Figure 27 – Completed and Planned Surveys by Category

Audience	Survey Name	Milestone/ Timeline	Launch Date	Frequency
Contractors	Job Trainee Performance Survey	Post-project installation	Launched Q3-Q4 2021	Ongoing post-installation
Contractors	Job Trainee Employed Survey	Post-project installation	Launched Q3-Q4 2021	Ongoing: 3, 6 and 9 months after reported trainee hiring
Contractors	Contractor Workforce Survey	As available	Launched Q2-Q4 2023	Completed
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	Completed
Job Trainees	Job Trainee Experience Survey	Post-project installation	Q1-Q2 2022	Ongoing post-installation

ME&O Program Research

SOMAH's research projects in 2023-24 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 was routinely updated as focus and priorities changed, and research continued in 2024. In addition to participant research, the PA has conducted a deeper dive into eligible properties to better understand the market for SOMAH properties. Previous research projects included Contractor Focus Groups, Property Owner Pipeline Analysis, Subcontractor Interviews, Tenant Education Focus Groups, and Building Inventory Analysis. Please refer to prior Semiannual Progress Reports for further information on research projects before 2023.

Figure 28 – SOMAH 2023-24 Program Research

Project Descriptions	Research Objectives	Audience	Timeline
Eligible Contractor Outreach and Interviews	• Engage contractors to determine their 2024 SOMAH participation plans. • Understand barriers to participation and gaps in knowledge about SOMAH resources that preclude participation. • Determine challenges contractors face in submitting applications and how the SOMAH PA can facilitate.	SOMAH PA	Q3 2024

Eligible Contractor Outreach and Interviews

During this reporting period, the SOMAH PA conducted research to target specific contractors for outreach to determine if they plan to participate in SOMAH. Once a response was received, the SOMAH PA used conversational interviews to explore barriers and gaps in program resources and knowledge that may be precluding their participation. Additionally, the interviews explored the challenges contractors may have in applying and what the SOMAH PA can do to facilitate and encourage their application submissions. The SOMAH PA conducted 11 interviews and found that the majority of interviewees (80%) were likely or very likely to submit a SOMAH application. The main challenges they faced in applying were:

- The need for clarification on the application process.
- Utility delays.
- NEM 3.0 returns.
- Difficulties meeting job training requirements.

They found most SOMAH resources useful, such as the property eligibility map, the SAPR report, online resources and the toolkits provided. For those who were unlikely to apply (20%), their barriers were mainly financial. Some were new companies that lack personnel and others mentioned difficulties with certain solar policies, such as virtual net metering (VNEM) and Net Energy Metering 3.0 (NEM 3.0) and with the utility companies.

Contractors did not provide many suggestions or recommendations; however, some were that SOMAH should include a battery storage component to the program, conduct more outreach and provide property owners with resources to help them understand the long-term benefits of SOMAH.
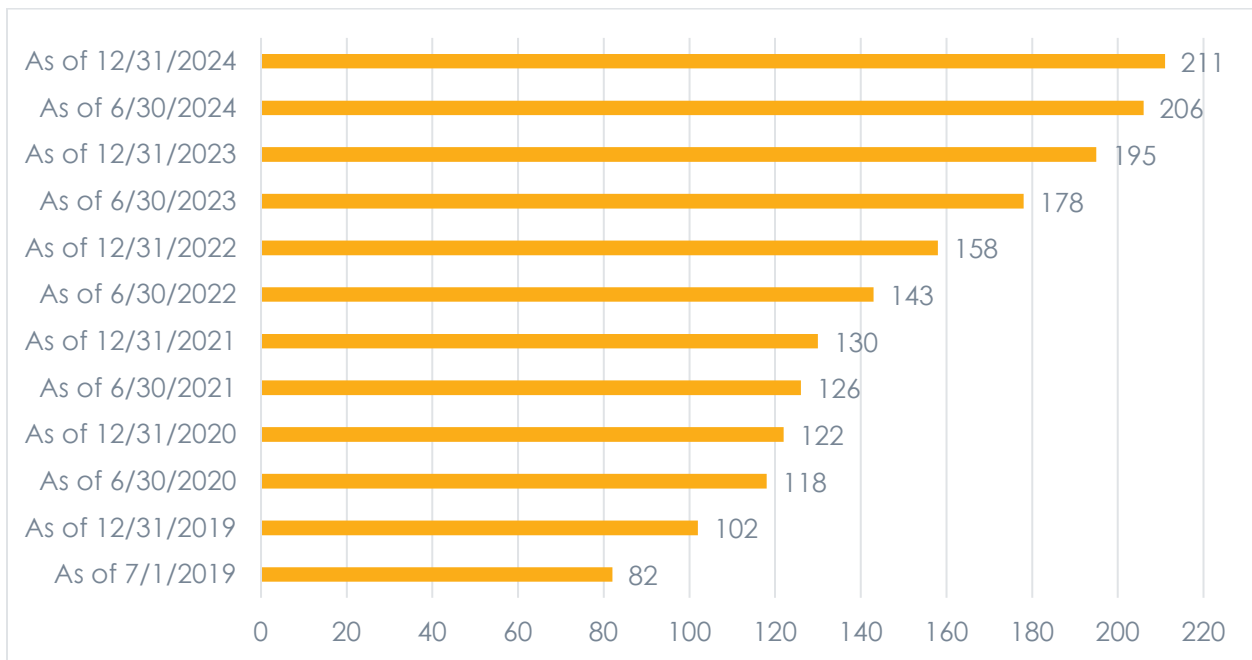
3.2.3 Contractors

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

The PA continues to engage contractors through ongoing quarterly Applicant and Contractor Eligibility Trainings. During this reporting period, eligibility training sessions were held in August and October 2024. The applicant and contractor training sessions had a total of 31 attendees out of 77 registrants. Attendees included new contractor companies, new staff members for already eligible contractors and representatives from energy efficiency agencies. Training session promotion included several social media posts on SOMAH's Facebook, LinkedIn and X channels. At the close of this reporting period, there were a total of 211 SOMAH-eligible contractors, as shown in Figure 29.

**Figure 29 – Number of Eligible Contractors Over Time**

This reporting period, there were five new SOMAH-eligible contractors and three new subcontractors. The PA continues to prioritize outreach efforts in geographic regions with low application submissions such as Central Valley and PacifiCorp and Liberty territories. In 2023, the PA conducted contractor research of larger nonparticipating contractor companies throughout California that have not completed the SOMAH contractor eligibility process and looked specifically at Liberty Utilities and PacifiCorp

service territories. Direct contact with these nonparticipating contractors was initiated in the second half of 2024 and will continue to expand into 2025. This outreach focuses on increasing the number of SOMAH eligible contractors, thereby increasing program participation.

One applicant and contractor office hour webinar was offered during this reporting period. Office hour webinars were started in 2023 to address topics contractors had expressed difficulty in understanding and provide an open forum for questions. This year, SOMAH covered Handbook 8 changes in March, Technical Assistance and Support Services in June and highlighted property leads and tribal resources available to contractors in September. The three webinars had a combined registration of 71 with 28 attendees. SOMAH will host its first office hours of the year in March 2025. This session will cover how SOMAH projects can co-enroll in other energy efficiency programs, focusing specifically on the Multifamily Energy Savings Program.

**Figure 30 – Eligible Contractor Statistics**
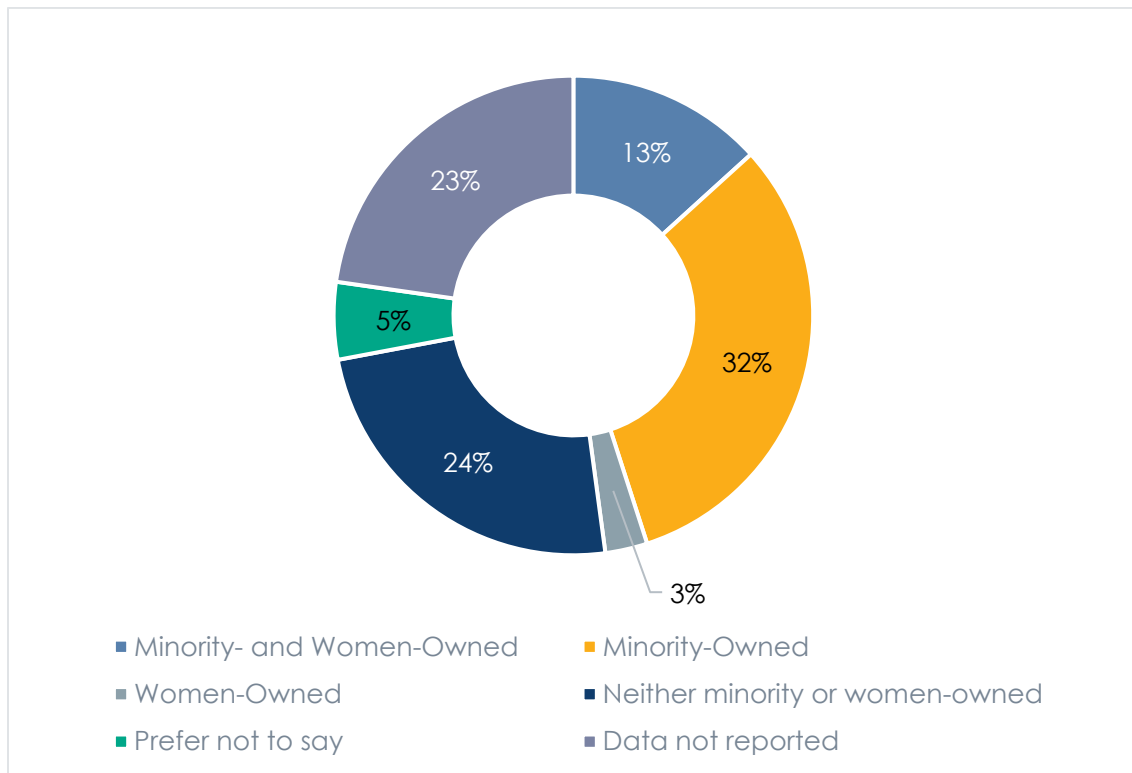
N = 211

SOMAH continues to strive to increase participation by diverse contractors, defined by SOMAH as companies owned by minorities, women and/or LGBTQIA+ as well as small companies with fewer than 25 employees. Out of the total 211 SOMAH eligible contractors, 157 identified as small companies. Of the five new contractors this reporting period, three identified as minority owned and one identified as woman owned.

Figure 31 – Active Contractor Diversity
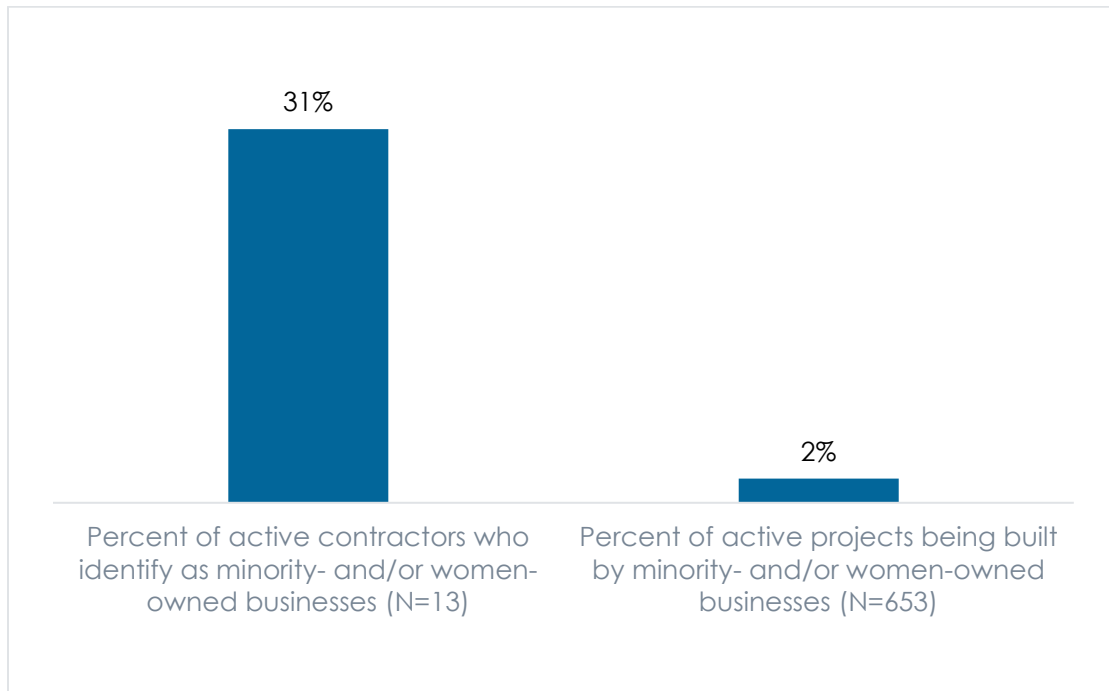
In 2024, the SOMAH PA approved two additional power purchase agreement (PPA) providers interested in pairing with contractors and subcontractors on SOMAH projects. A PPA Providers page on the SOMAH website provides the names and contact information of pre-approved PPA companies. SOMAH PPA providers were featured in the June 2024 SOMAH Scoop newsletter. The PA continues to do outreach and meet with new providers to increase participation in the program. This pairing helps with overcoming financial burdens and limitations with ownership options that smaller contractors have listed as a barrier to participating in SOMAH.

This reporting period had three new subcontractors on SOMAH projects. Increases in project completions have helped increase subcontractor participation reporting as prime contractors manage the application process and/or financial side of SOMAH projects, including PPAs. SOMAH contractors were featured in the December 2024 SOMAH Scoop newsletter to highlight how easily contractors can find subcontractors listed on the SOMAH website.

Once a project has reached completion, the SOMAH PA receives information about subcontractors used at SOMAH projects. Over the past year, reporting of subcontractor use overall has increased. As highlighted in the 2023 SOMAH Second Triennial Report, subcontractors are increasing overall contractor diversity despite a lack of diversity of prime contractors because the subcontractors are often diverse businesses.[22]

Additionally, the SOMAH PA conducted subcontractor interviews in Q3-Q4 2022 that provided further insights and information on the relationships between primary and subcontractors as well as their roles and overall engagement in the program. The subcontractor information collected from the application process also provides insights into the diversity of contractors engaging in and benefiting from the SOMAH Program. Currently, five contractors are using subcontractors on 189 different projects. In total, there are 35 separate subcontracting companies working in support of completing SOMAH projects.

Figure 32 – Subcontractor Statistics
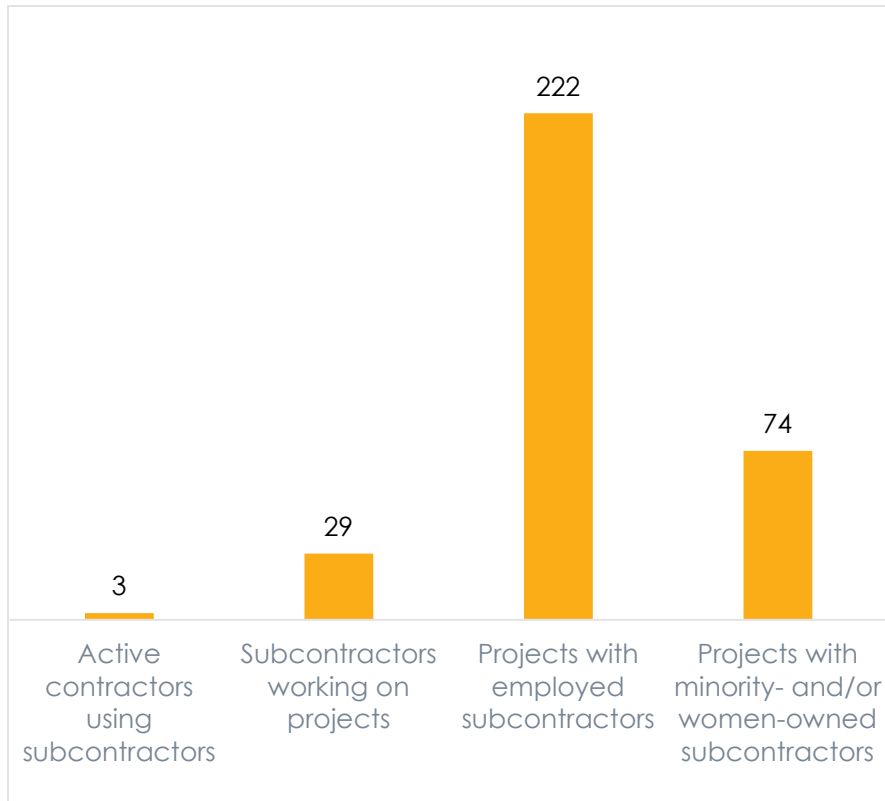
[22] Diverse businesses are small (i.e., < 25 employees) or underrepresented-owned businesses.

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

3.2.4 Property Owners

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

Direct Email Outreach

During this reporting period, direct emails were sent to 164 property owner organizations/companies (property management companies or PMCs) including 23 housing authorities and 45 non-federally recognized and 78 federally recognized tribal entities.[23] These companies represent a large portion of the total number of eligible properties, as a single PMC can have numerous SOMAH-eligible properties in its portfolio. Direct outreach emails were sent to invite property owners to webinars and events, highlight prospective SOMAH projects, provide information on how to request Technical Assistance Preview reports, offer one-on-one portfolio reviews with a SOMAH PA member and introduce the SOMAH Program through a PowerPoint overview of the program, eligibility requirements and available incentives. In addition, the SOMAH PA conducted outreach to 18 property owner organizations and host customers clarifying previously forfeited application deposits are now able to be re-used for application re-entries.

A specific focus of direct outreach during this reporting period was information sharing for SOMAH's expanded eligibility requirements by targeting prospective property owners who may have previously been ineligible and/or may have had complications enrolling in SOMAH due to previous eligibility barriers. Examples include public housing authorities, tribal entities and properties with higher income thresholds. To engage these

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[23] Previously reported data includes the total sum of outreach across all divisions of the SOMAH Program.

property owners, the PA initiated multiple outreach campaigns to ensure that property owners had various communication touchpoints with SOMAH. Thirty Technical Assistance Preview Reports have been compiled and shared with property owners to provide them with key information to consider before getting started with a SOMAH project. The reports emphasize the financial aspects of projects including how SOMAH incentives can be co-leveraged with federal investment tax credits (ITC), a main topic of interest for property owners. The SOMAH PA intends to continue outreach efforts throughout the year to actively target properties that may more easily qualify for SOMAH through the expanded eligibility pathways. Planned activities include identifying co-marketing partners that serve public housing authorities and tribes, as well as continuing to disseminate direct outreach emails.

Additionally, the SOMAH PA is focusing outreach efforts to develop an email nurture campaign to target applicants with cancelled applications on a biweekly basis. Through the email nurture campaign, previously enrolled applicants will receive communications with messaging focused on resources for host customers, such as the available Technical Assistance and Support Services, financial feasibility, updated eligibility requirements and increased incentives. The goal of the email nurture campaign is to encourage these prospective leads to consider re-enrolling their projects and/or working with the SOMAH PA to identify additional properties in their portfolio that may be eligible for the program. Additionally, the SOMAH PA intends to launch a quarterly outreach effort starting in Q1 2025 to conduct direct outreach to all cancelled applications within the quarter throughout the remainder of the year.

Tribal Outreach

One of the SOMAH PA's goals is to increase participation among tribal entities. During this reporting period, the SOMAH PA connected with partner organizations that serve tribes including GRID Alternatives' Tribal Program and the California Coalition for Rural Housing (CCRH) to share program updates, discuss prospective projects and identify co-marketing opportunities. The PA plans to connect with additional tribal entities in 2025 to foster program utilization among tribes.

As reaffirmed by the 2023 Triennial SOMAH Evaluation Report, the SOMAH PA increased outreach to both federally and non-federally recognized tribes using a list of 180 tribal representatives from the Native American Heritage Commission. With this list, the SOMAH PA has been able to focus on specific IOU territories determined to have the highest potential for likely SOMAH-eligible properties and streamline outreach efforts. This reporting period, the PA focused on outreach to co-marketing partners in the PacifiCorp territory including the Tahoe Regional Planning Agency. The PA also expanded outreach in the SDG&E and PG&E regions.

Property Owner Outreach Events

The PA presented at three additional property owner events, including an in-person presentation in collaboration with the City of Irvine (32 attendees) and two virtual presentations with the Permanent Housing Learning Collaborative (20 attendees) and the San Diego Housing Federation Developer's Forum (20 attendees). These presentations included an overview of the SOMAH Program, available incentives, the enrollment process and how to leverage Technical Assistance and Support Services.

- Presentation for the City of Irvine and OC Goes Solar (August 7, 2024)
- SCANPH 2024 Conference (October 9-10, 2024)
- Permanent Housing Learning Collaborative (PHLC) Presentation (October 23, 2024)
- San Diego Housing Federation Developer's Forum (October 28, 2024)
- PG&E SPOC Multifamily Energy Efficiency Program Opportunities (November 14, 2024)

Website, Social Media & Digital Marketing

The SOMAH website and social media channels serve as additional sources 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 2,180 page views. New resources for property owners have been added continually to the website, including success stories, video testimonials and application tutorials. This reporting period the Check Eligibility Form on the SOMAH homepage had 77 total submissions. Once submitted, the SOMAH PA reaches out to schedule an interest call and discuss program eligibility, incentives and benefits. The SOMAH PA will continue these engagement efforts and coordination of interest calls, which provide a deeper look into property eligibility before a prescreen or Technical Assistance and Support Services are requested.

In Q3, SOMAH launched the new Tribal webpage, a dedicated resource for tribal property owners. The webpage is a significant step in expanding access to solar energy and supporting sustainable development within tribal communities.

The page provides tailored information for the unique needs of tribal communities, including:

Eligibility Requirements: Detailed criteria for tribal properties to qualify for SOMAH incentives.
Benefits of SOMAH: An overview of how the program reduces energy costs, promotes sustainability and fosters job creation.

Application Resources Guide: Comprehensive guidance for tribal groups to navigate the application process.

Bishop Paiute Success Story: A spotlight on the Bishop Paiute Tribe's achievements in harnessing solar energy for their community.

The CalSOMAH email listserv provides important program updates, including funding announcements, program changes and alerts about upcoming events and webinars. The listserv added 51 additional property owners during this reporting period. In Q3, SOMAH completed a comprehensive database cleanup, removing unsubscribed users, inactive/suspended accounts and invalid email addresses. While this reduced our total subscriber count from 458 to 213, it ensures more accurate engagement metrics. CSE's marketing team will conduct annual database maintenance to maintain the accuracy of the CalSOMAH email listserv.

Figure 33 – Property Owner Subscribers Over Time
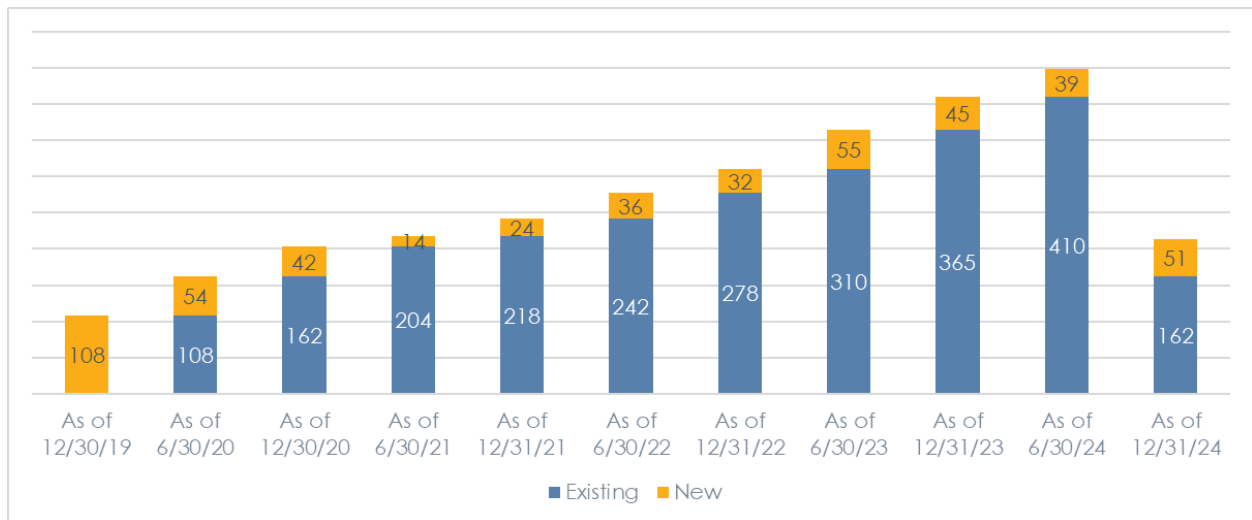
3.2.5 Tenants

The primary objectives of tenant education are to ensure residents of potentially eligible SOMAH properties and those living in participating properties are aware of the program and able to benefit from SOMAH in an equitable manner.

Tenant Education Services

The SOMAH PA continues to promote Tenant Education Services through quarterly tenant education trainings and webinars, including the Applicant and Contractor Eligibility Trainings and public forums. As an essential tool for tenants, the SOMAH PA has prioritized promoting the Tenant Education Hotline, specifically focusing on the hotline

during workshops and training sessions. In Q3-Q4 2024 the SOMAH PA received nine phone calls to the tenant hotline from eight unique callers connected to seven unique SOMAH projects.

For this reporting period, there were 10 in-person tenant education workshops at seven properties. These workshops were in the Southern California, Inland Empire and Bay Area regions and were facilitated in the following locations: Arroyo Vista in Mission Viejo, Claremont Village in Claremont, Chapel Lane in Ventura, Vista Point in Monterey, Hilton Street in Oakland, The Arbors in Richmond and Blossom Trail in Sanger. The following language needs were requested: English, Spanish, Chinese, Vietnamese and Farsi. Interpreters for Spanish and Chinese were hired to facilitate on-site translation as needed.

The SOMAH PA also continues to review affidavits to make sure the tenant education requirement for contractors and property owners is met. In Q3-Q4 2024, 96 projects submitted tenant education affidavits and reached the designated milestones (e.g., Proof of Project, Incentive Claim). These projects accomplished the tenant education requirements by completing both the first and second outreach touchpoints.

As of November 2024, the CPUC has ruled to eliminate the tenant education requirement from the program. This will go into effect by July 1, 2025.

The SOMAH PA is conducting a revision of the Tenant Education Toolkit and Tenant Education Services and plans to complete it in 2025. Revisions will incorporate the removal of the tenant education requirement as well as recommendations for improvement from previous evaluations and findings from tenant surveys.

Interconnection Impacts on Tenants

As more SOMAH projects complete and interconnect with the IOUs, more tenants are becoming aware of the solar projects at their properties and how they will benefit. With more completed projects, SOMAH is actively tracking the amount of time needed for projects to receive interconnection and the time from interconnection to receipt of bill credits. Recent data shows that for over 230 SOMAH projects, the timeline from construction start to interconnection is averaging over 12 months for the main IOUs (PG&E, SCE, SDG&E). Additionally, the average amount of time for residents to receive bill credits after interconnection is over three months.

Tenants remain a central pillar of the SOMAH Program, and the economic relief SOMAH aims to provide to the tenants is delayed when there are extended timelines for tenants to receive bill credits. SOMAH will continue to work with the IOUs to understand the

interconnection processes and reduce extended timelines as well as work with the CPUC to escalate extended timelines to reduce tenant impact.

3.2.6 Stakeholders

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

The SOMAH PA engaged in activities across these two focuses, including collaborating with energy efficiency programs through RENs and the IOUs, speaking at stakeholder-led events and webinars and developing co-marketing materials. The following sections summarize the PA's accomplishments in Q3-Q4 2024.

IOUs, CCAs and RENs

Throughout this reporting period, the SOMAH PA maintained collaboration with the IOUs: Liberty Utilities, PacifiCorp, PG&E, SCE and SDG&E. The SOMAH PA met quarterly with representatives of PG&E, SDG&E and SCE's Single Point of Contact (SPOC) services and the new statewide Multifamily Energy Savings (MFES) program, which launched in July 2023. To raise awareness of this program, updated information has been added to the SOMAH website for co-marketing. The PA focused the second half of the year on addressing co-enrollment of SOMAH projects in the MFES program, working closely to ensure alignment of the two programs and develop co-enrollment pathways. By Q2 2025, the PA plans to develop program co-enrollment guidelines, specifically how enrollment in the MFES program applies to SOMAH's Energy Efficiency Compliance Milestone.

During Q3-Q4, SOMAH's IOU partners co-promoted the program on several separate occasions. In the PG&E territory, SOMAH was featured in both the PG&E contractor newsletter as well as the PG&E property owner newsletter. Additionally, SOMAH presented at the PG&E Multifamily Energy Efficiency Program Opportunities webinar in November (14 attendees), which focused on leveraging different incentive programs across the territory. The SOMAH PA also featured San Francisco Community Power and PG&E Single Point of Contact Service (SPOC) in the Q3 SOMAH Scoop newsletter. Co-marketing the program has helped spread program awareness to customers of

participating IOUs. Finally, PG&E, PacifiCorp and SCE connected the SOMAH PA to IOU tribal liaisons for co-marketing opportunities.

Local Governments and Elected Officials

During this reporting period, SOMAH created a variety of new partnerships with local governments and elected officials. The PA met with the City of Oakland and the City of Woodland, which led to connections with their respective housing authorities. Additionally, SOMAH is now featured on the Rebates page of the City of Woodland's website. The PA also participated in two in-person presentations, one for the Southern California Tribal Chairmans Association (SCTCA) at the Pala Indian Reservation and a presentation at the City of Chula Vista's Benchmarking and Beyond event, alongside the Southern Multifamily Energy Savings Program. The SOMAH PA continues efforts to prioritize fostering relationships and participation in communities with lower engagement in the program. As a part of this effort, the PA plans to continue direct outreach to local government offices in Q1-Q2 2025, with the goal of sharing the program's newly expanded eligibility pathways and connecting with newly eligible properties across the state.

3.3 Workforce Development

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

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

Job Training Organization Outreach & Job Trainee Engagement

Completed or nearly completed SOMAH projects have created 730 job opportunities and 45,520 trainee hours. The current SOMAH application pipeline is projected to create 441 job training opportunities and 28,280 trainee hours. To broaden SOMAH's pool of eligible job trainees, the SOMAH PA continued to engage with JTOs that serve targeted trainees and geographic regions where participation has been lower historically, including Northern California, Central Valley and Central Coast. The SOMAH PA also continues to focus outreach to JTOs that serve priority populations, such as justice system-impacted individuals, trainees residing in rural areas and tribal communities.

During Q3-Q4 2024, there were 95 active JTOs in the JTO Directory. In this reporting period, the SOMAH PA prioritized existing JTO partnerships and focused on bolstering the HeatSpring SOMAH Academy program. Thirty new trainees were added to the SOMAH Job Training Portal for a total of 541 job trainees engaged on the portal.

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

Contractor Job Training Support

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

Additionally, the SOMAH PA organized programming to help contractors meet their job training requirements and support the program's local and targeted hiring goals. In September and December 2024, the SOMAH PA hosted Job Training Overview webinars for contractors that detailed SOMAH's job training requirements and the program's workforce development resources and services. Contractors were provided with a detailed demonstration of the Job Training Portal and how to leverage it to help meet their job training requirements.
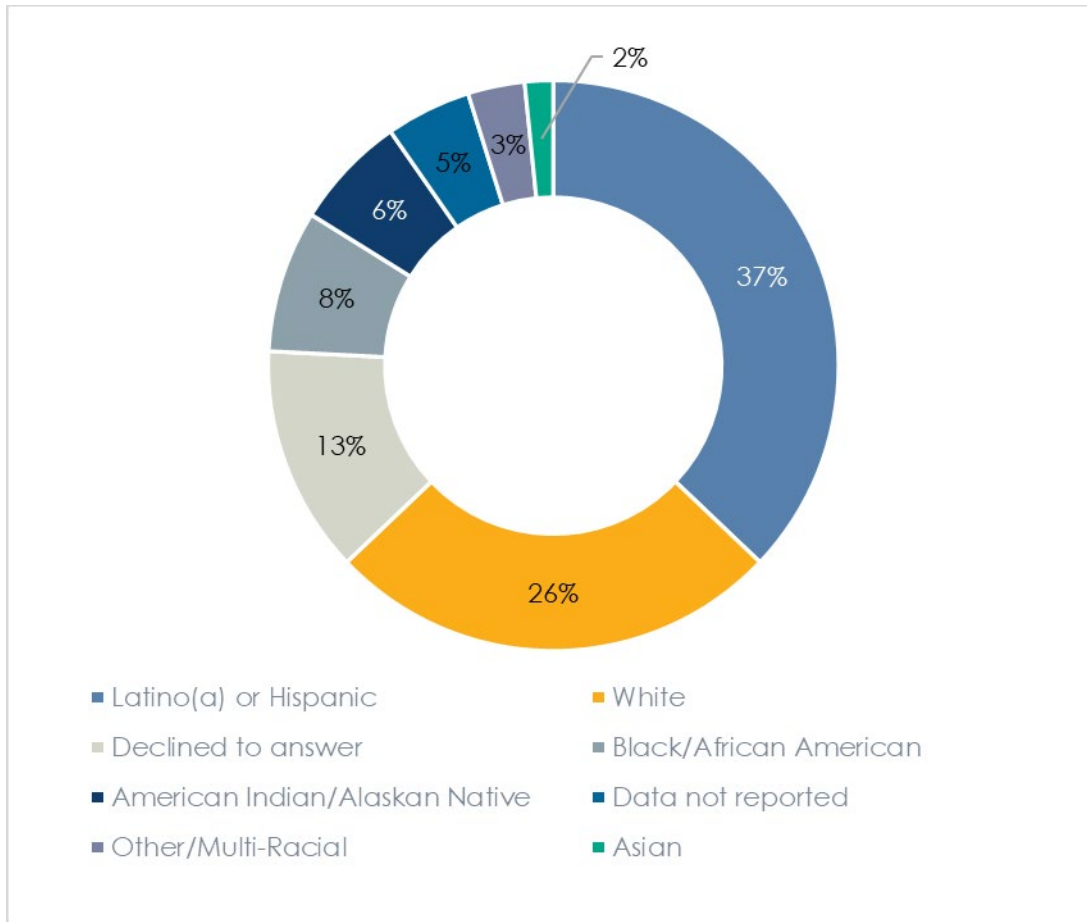
3.3.1 Local Hiring and Job Training Data

During this reporting period, the SOMAH PA received 86 Job Training Affidavits from projects that reached the Incentive Claim Milestone for a total of 275 projects that have submitted affidavits. The Job Training Affidavits submitted in Q3-Q4 2024 report 159 job training opportunities. To date, 49% of trainees have worked on more than one SOMAH project, gaining enhanced hands-on experience and solar installation skills.

The SOMAH PA collected and analyzed demographic information on 62 of the 144 job trainees hired through the Job Trainee Intake Form (Figures 34-40 depict findings). 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 585 job training surveys, with 35 job trainees reported as hired by contractors for continued employment.

Local & Targeted Hires:
- 43% of job trainees reside in DACs.
- 25% of job trainees were local hires living in the same county as the SOMAH project.
- 98% of job trainees were targeted hires.
- 40% reported as unemployed or underemployed at the time of SOMAH intake.
- 21 tenants of SOMAH properties participated as job trainees.
- 24 job training organizations have students or graduates who have participated in SOMAH job training opportunities.
- $29.34: average trainee hourly wage.
- 66.08: average training hours per project per trainee.

Figure 34 – Job Trainee Race/Ethnicity Breakdown

Legend:
- Latino(a) or Hispanic
- White
- Declined to answer
- Black/African American
- American Indian/Alaskan Native
- Data not reported
- Other/Multi-Racial
- Asian

N = 62

Figure 34 is a snapshot of SOMAH project job trainee breakdown by race/ethnicity. Latino(a) or Hispanic trainees comprise the majority of SOMAH trainees, totaling 37%.

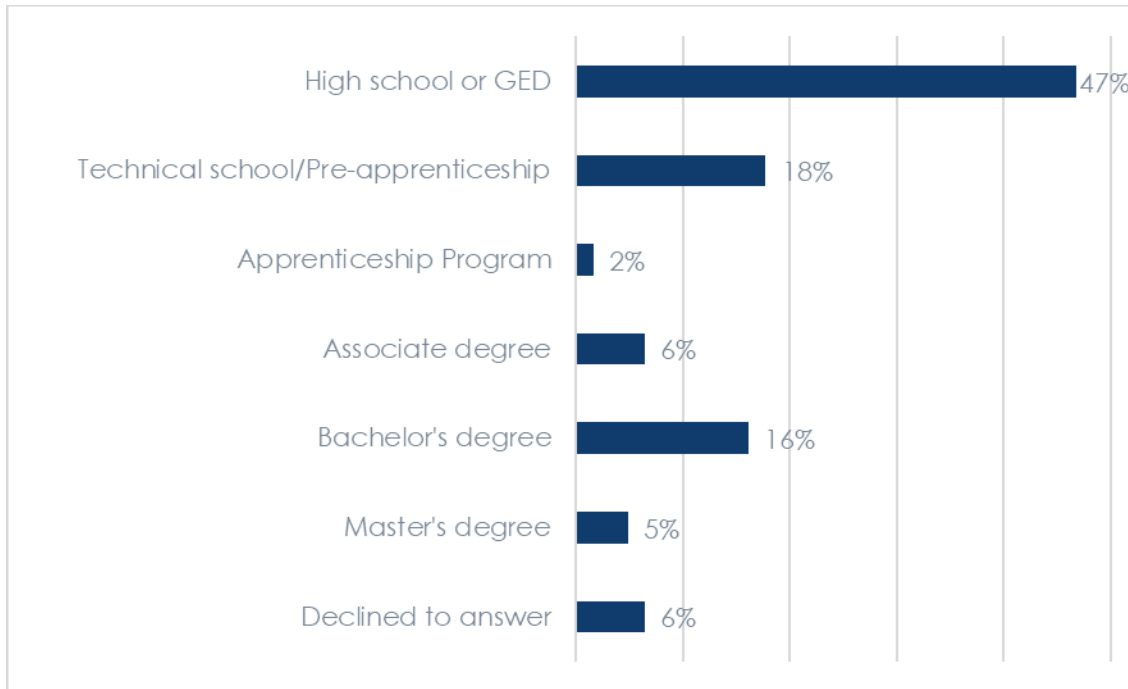**Figure 35 – Job Trainee Gender Breakdown**
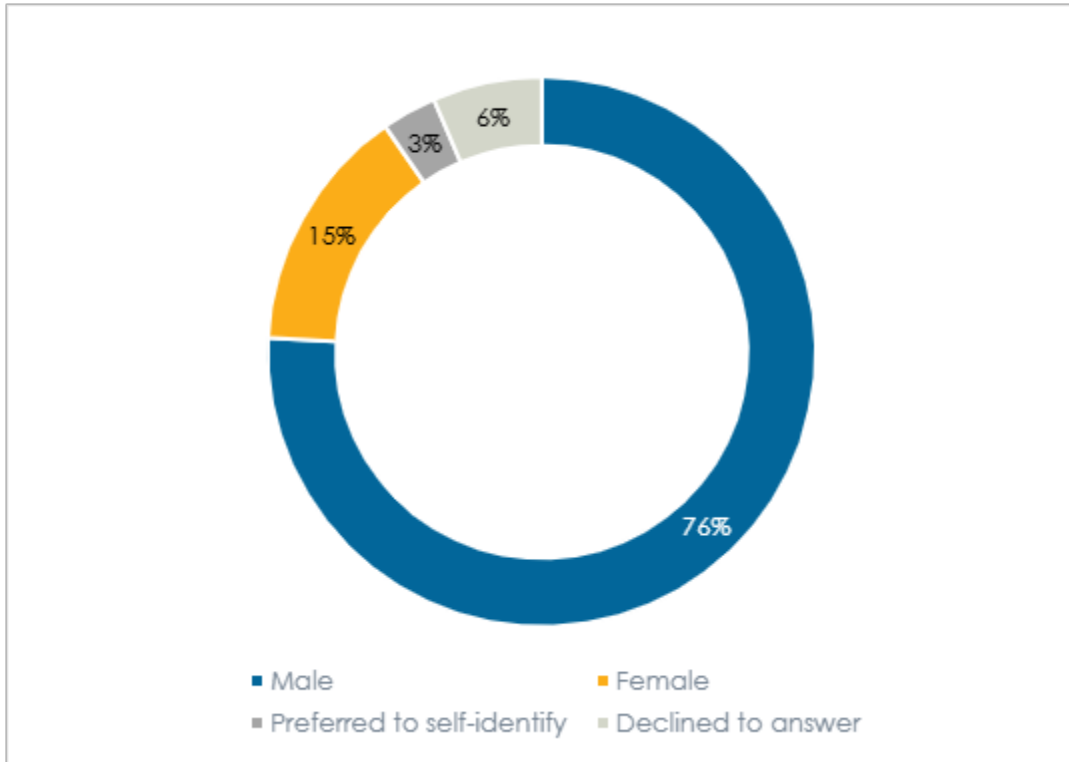
N=62

Figure 35 is a snapshot of SOMAH project job trainee breakdown by gender. Most trainees (76%) identify as male while 15% identify as female.
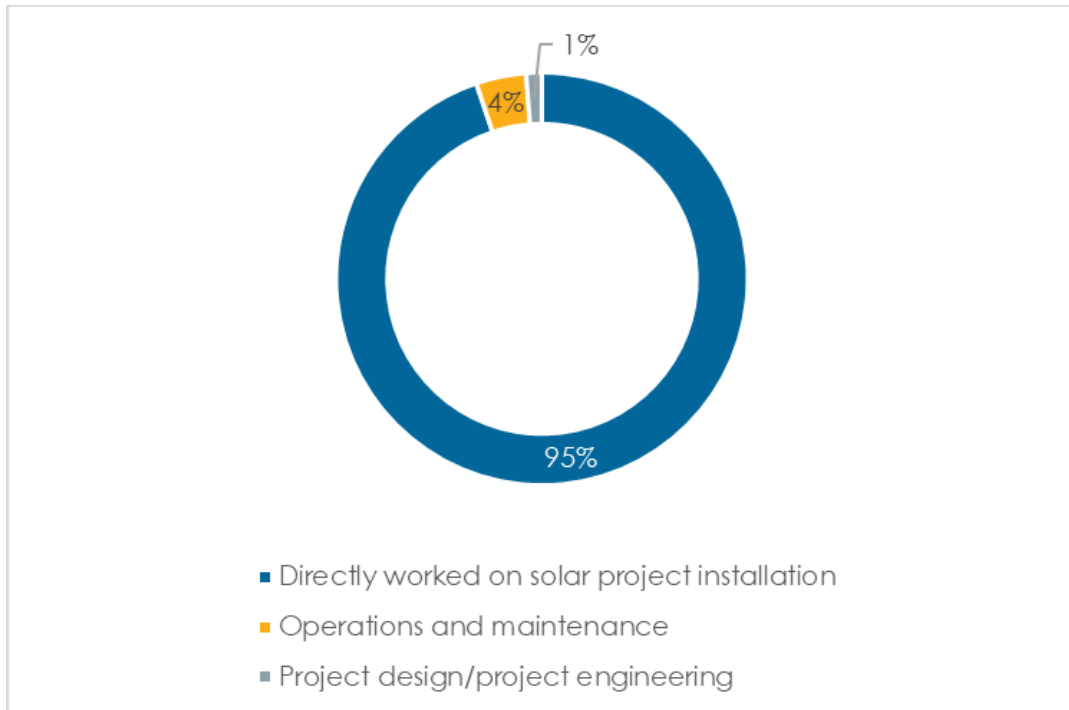
Figure 36 – Highest Level of Job Trainee Education

N = 62

Figure 36 is a snapshot of SOMAH project job trainee breakdown by the highest level of education. A total of 67% of SOMAH job trainees participated in SOMAH job training opportunities without a college degree.

Figure 37 – Percentage of Trainee Placements by Project Role

N=406

Figure 37 is a snapshot of SOMAH project job trainee breakdown by project role placements, with 95% of tasks assigned being directly related to solar installation.

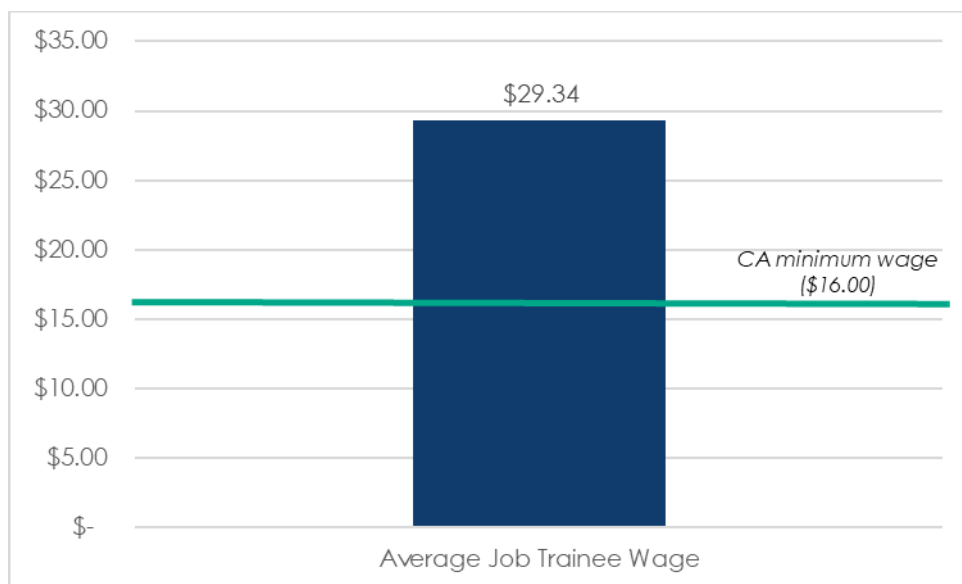**Figure 38 – Average Trainee Wage Compared to CA Minimum Wage**

Figure 38 is a snapshot of SOMAH project job trainee average wage relative to California's minimum wage. On average, SOMAH job trainees earn $29.34/hour, surpassing the California minimum wage of $16.00/hour at time of reporting. The SOMAH PA does not handle compliance with prevailing wage requirements for projects and does not report on wages.

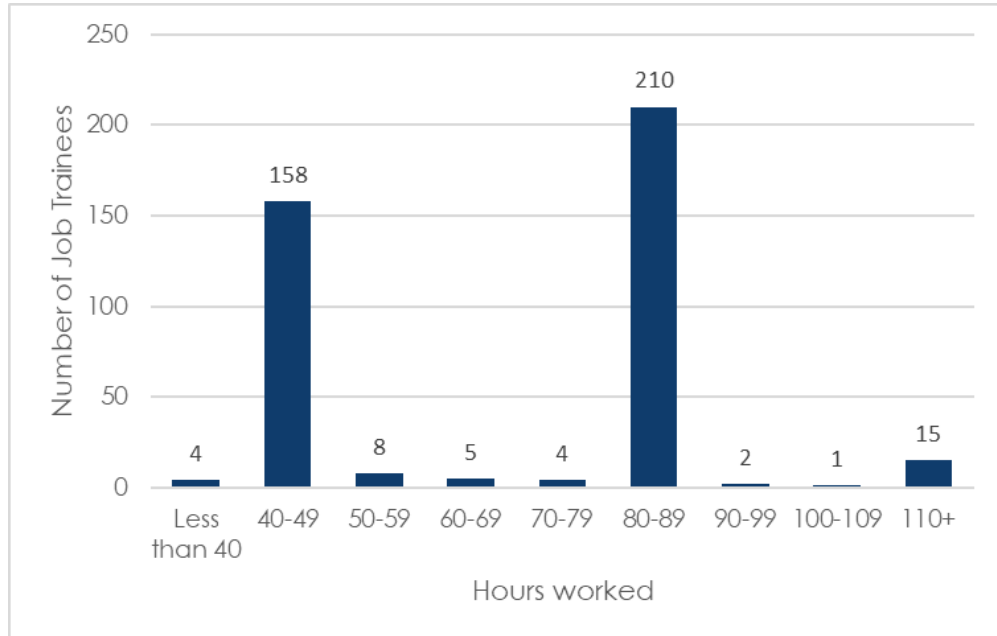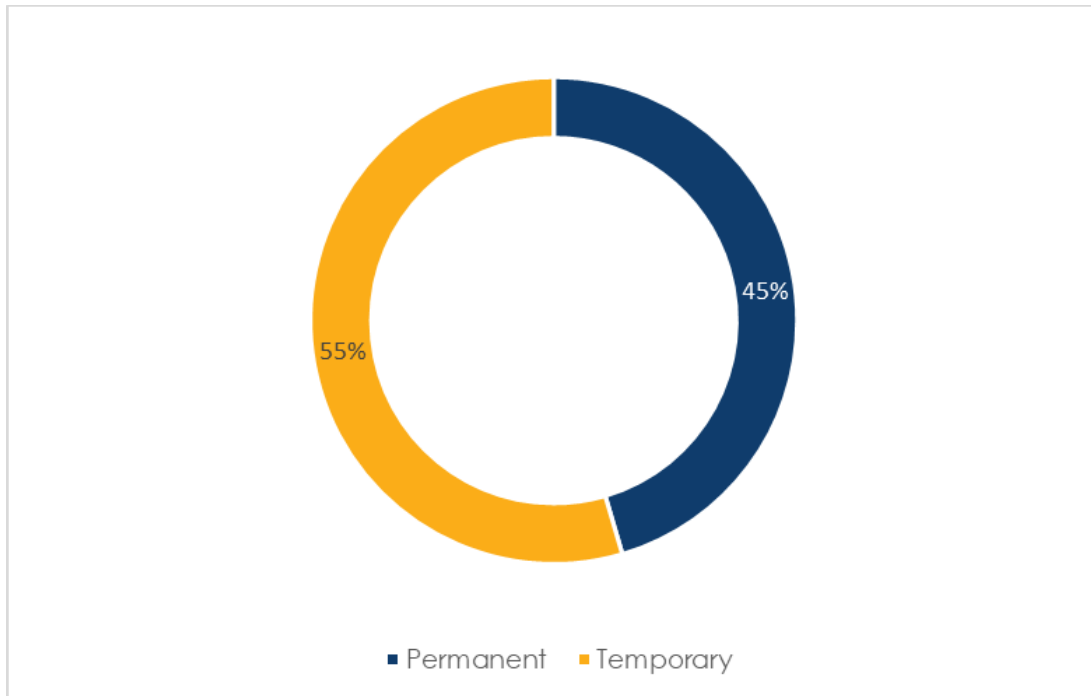**Figure 39 – Hours per Job Trainee Placement**

Figure 39 is a snapshot of the number of SOMAH job trainees and the hours they worked. Most trainees worked more than 80 hours on their project, with 52% of trainees working 80-89 hours.

Figure 40 – Percentage of Trainee Placements by Employment Status

N=407

Figure 40 is a snapshot of SOMAH project job trainee breakdown by employment status, with 55% of SOMAH trainees classified as temporary workers during their tenure with the respective contractor. A total of 45% of trainees were hired as full-time employees after their work on a SOMAH project.

3.4 Community-Based Organizations

The SOMAH PA continues to partner with eight Community-Based Organizations (CBOs) who support the program's direct outreach in their respective service areas. Prioritized audiences include property owners who might become participants, local stakeholders with an emphasis on co-marketing partnerships and tenants needing program services and education. Each CBO has a focus that connects with its audience and aligns with SOMAH's programmatic goals.

The eight SOMAH CBO partners are:

- California Environmental Justice Alliance (CEJA)
- Self-Help Enterprises (SHE)
- Asian Pacific Environmental Network (APEN)
- Environmental Health Coalition (EHC)

- Communities for a Better Environment (CBE)
- Community Environmental Council (CEC)
- The Niles Foundation (TNF)
- OC Goes Solar (OCGS)

During this reporting period, the SOMAH PA hosted a CBO summit that brought together all eight partners to explore shared strategies, lessons learned and potential opportunities.

Q3 2024 in-person meeting topics included:

- Workforce Development: Job Trainee Outreach
- Tenant Education
- Communities for a Better Environment: Community Tour

Seven of the SOMAH CBO partners continue to support property owner outreach through direct outreach efforts, leading to one-on-one meetings. CBOs conducted 403 outreach activities to engage property owners, including cold calls, emails, one-on-one meetings, presentations, mailers, attending housing conferences, creating property owner focused events and on-site visits to properties, especially in DAC communities. Seven Technical Assistance Preview Reports were requested to show prospective program participants what the estimated solar benefits could be for their specific property.

Six CBO partners directly engage with local stakeholders to coordinate co-marketing partnerships with the SOMAH Program. These CBOs have brought in leads by cultivating relationships with their contacts and presenting the benefits of the SOMAH Program. CBOs participated in 39 outreach activities to engage with local government stakeholders. The SOMAH PA meets quarterly with participating CBOs about stakeholder outreach.

Seven CBOs continue to support the SOMAH PA with tenant education services. CBOs led one continued tenant education workshop at Blossom Trail in Sanger and co-led one workshop in Claremont in October 2024. SHE's work in the tenant education space led to Fresno Housing Authority requesting to coordinate more tenant education workshops for Q1 2025. Tenant education workshop requests continue to increase, with a handful of workshops already in coordination for 2025. Five CBOs continue to educate the community on solar job training opportunities by providing presentations, sharing resources at community tabling events and creating innovative ways to bring awareness of the solar industry to workers. CBOs participated in 10 outreach activities to engage community members on SOMAH job training opportunities. With program

updates being finalized and implemented starting mid-November, the SOMAH PA decided to extend current CBO partner contracts to the end of Q1 2025. The PA will use this additional planning time to reshape the CBO scopes to align with D.24-11-006. New contracts are slated to start on April 1, 2025.

CBO partnerships have proven to be extremely important in ensuring SOMAH outreach messaging and materials are appropriate, informative and intentional in reaching multifamily affordable housing providers and their residents across the state. The CBO KPIs shared above reflect Q3 efforts; KPIs for Q4 will be included in the next reporting period.

3.5 Technical Assistance

Offering a suite of Technical Assistance and Support Services provides everyone involved with a SOMAH project with direct access to program benefits. Installing solar PV on existing multifamily housing requires dealing with complex issues like ownership agreements, financing structures and cost-benefit projections – all areas where SOMAH can help. SOMAH is designed to provide no-cost, no-obligation personalized technical assistance services to help bridge knowledge gaps and facilitate solutions to common challenges as property owners and solar contractors consider, plan and install solar PV systems and the impacts on tenants.

SOMAH's Technical Assistance and Support Services cover a wide range of project-related elements, including solar feasibility, financial analysis, tenant education services and interconnection support as well as referrals to other energy efficiency programs. The Technical Assistance and Support Services extend from before a project exists, during the planning stages, to continued support after a project is completed. This means that SOMAH can offer support to all interested SOMAH participants, whether they have enrolled in SOMAH or are thinking about enrolling in SOMAH, with the goal of providing consumer protection, reducing the burden of participation and increasing access to objective expertise and resources.

It is vital for SOMAH to continue offering objective third-party expertise and resources. In doing so, SOMAH can balance the information provided by solar contractors to ensure property owners and tenants receiving benefits from the SOMAH Program are receiving objective, unbiased information related to their solar PV installation.

3.5.1 TA and Support Services

Understanding that all parties involved with a solar project may need support throughout the installation process, SOMAH's Technical Assistance and Support Services

can be requested at all stages as property owners and contractors consider, plan and install a solar PV system.

For the reporting period, 59 requests were made for various Technical Assistance and Support Services, totaling over 80 service types requested. Of the 59 requests made, 20% of the requests were initiated by solar contractors, which further supports the need to have support services made available for and marketed to all parties involved with solar projects.

The most frequent service type requested was for Technical Assistance Preview reports (36%). For the reporting period, 30 preview reports were created and presented to prospective property owners. The preview report is designed to help property owners decide if SOMAH enrollment is right for them. This concise two-page report is customized for each unique property and includes a preliminary solar PV system design and sizing, estimated incentive amount and financial analysis. The preview reports support property owners in weighing the prospective costs and benefits of installing solar. Upon receipt of the preview report, property owners are connected to a single point of contact who can provide education and access to SOMAH resources as well as initiate the SOMAH enrollment process if that is the desired next step.

Figure 41 summarizes the sources of the preview report requests in Q3-Q4 2024. It is notable that 60% of the requests for preview reports came from property owners through direct outreach from the property owner engagement team, and 23% of the requests came from property owners through outreach from SOMAH's CBO partners.

Figure 41 – Technical Assistance Preview Report Request Summary
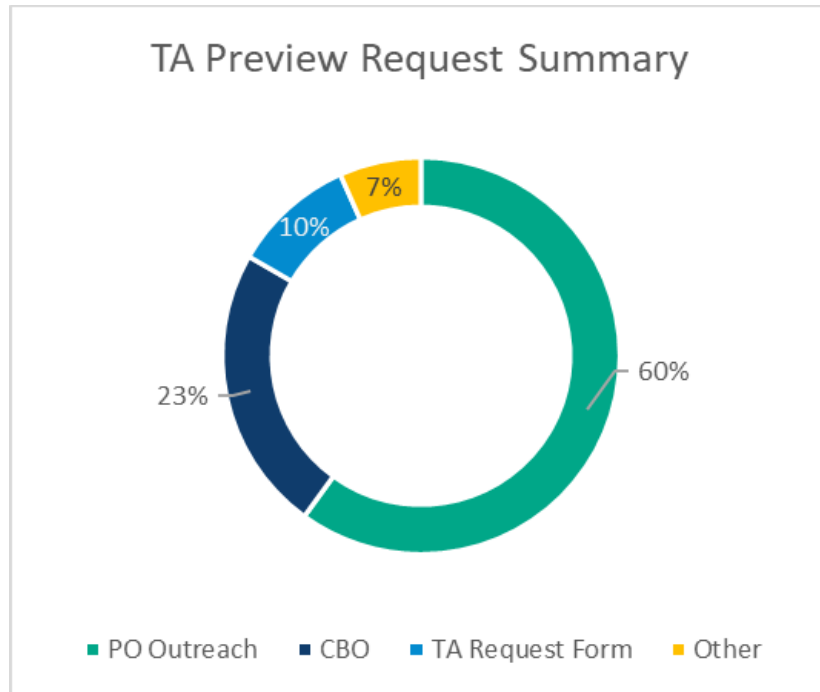
N=30

The next most requested service type was General Support (20%). By connecting to property owners and providing education and access to SOMAH resources, this led to over 10 Affordability Prescreen requests and four requests for Upfront Technical Assistance. Figure 42 summarizes the service types requested in Q3-Q4 2024. Solar feasibility and financial assistance were also frequently requested, with 11% and 9% of the requests, respectively. Understanding what service types are requested the most allows SOMAH to build out program resources or expand support services to better communicate and cater to those needs.

Figure 42 – Breakdown of TA and Support Service Request Types

TA and Support Service Requests

- TA Preview — 36%
- General Support — 20%
- Solar Feasibility — 11%
- Financial Assistance — 10%
- EE/Electrification — 7%
- Interconnection Assistance — 4%
- Contractor Bidding — 5%
- System Monitoring — 4%
- TE Services — 2%
- VNEM Allocations — 1%
- Job Training — 1%
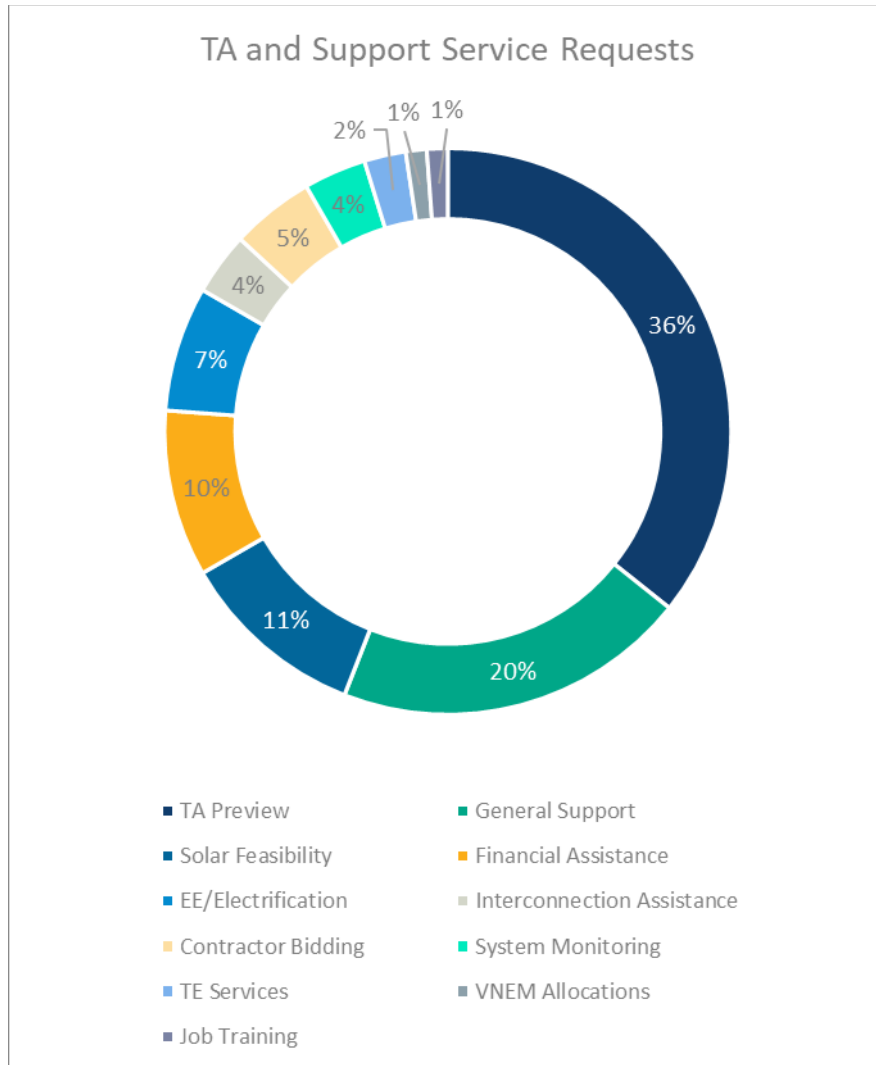
N=84

3.5.2 Upfront Technical Assistance

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

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

- Understanding the SOMAH Program process.
- Comprehensive solar assessment of their property or portfolio.
- Customized solar feasibility report, including a remote site assessment, incentive calculation and potential energy savings.
- Tools and metrics to help property owners source and compare eligible contractor bids with confidence.
- Guidance on usage data, financing options and what to expect after installation.
- Integration with energy efficiency, energy storage and electric vehicle programs.

To date, 30 projects have received Upfront TA and Support Services. Of those 30 projects, 16 projects are currently receiving Upfront TA and Support Services, seven projects are now at a later milestone in the SOMAH application life cycle and seven projects cancelled after receiving Upfront TA and Support Services.

Tenant benefits continue to be a central pillar of the SOMAH Program as well as a focus for projects participating in Upfront TA. For the 23 projects that have received or are currently receiving Upfront TA and Support Services, 83% of the clean energy produced from the solar PV systems is projected to directly benefit the more than 900 low-income households via virtual net metering (VNEM) bill credits, offsetting 88% of their expected historic electrical consumption.

Additionally, the tenants connected to the projects that have received or are receiving Upfront TA and Support Services will gain added benefits from deep energy retrofits in conjunction with solar. Over 65% of those projects were either referred to SOMAH by a comprehensive energy efficiency program or took advantage of SOMAH's Upfront TA and Support Services to receive a referral to, and enrolled in, a comprehensive energy efficiency program. A key focus during Upfront TA is considering a holistic approach to pursuing solar that also considers energy efficiency upgrades and electrification at the same time. This approach is unique to SOMAH and a consideration that may be often missed for projects that do not participate in Upfront TA. A holistic approach often can be a catalyst for larger, more impactful improvements at these properties in the future that deliver greater benefits for the low-income tenants.

The average estimated system size for the 23 projects is 117 CEC-AC kW with an average expected aggregate annual output of 177,680 kWh. Figure 43 outlines additional system statistics across the IOU territories for the projects.

Figure 43 – Track A Summary

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

To improve property owners' understanding of the intricate ownership and financing structures for their projects, as well as further expand SOMAH's Upfront TA and Support Services, they are continually offered resources and guidance. Examples include resources explaining changes to the federal investment tax credit that can improve the financial benefits of solar PV projects. Such guidance ensures property owners understand the steps and timelines involved in leveraging tax credits and other financial mechanisms that can make their projects more viable.

3.5.3 Fleet Monitoring

As noted, SOMAH's Technical Assistance and Support Services extend to include continued support after a project is completed. Fleet monitoring is a SOMAH Program requirement to ensure SOMAH-incentivized PV systems are performing as expected and the direct financial benefits for both property owners and tenants are fully realized. SOMAH monitors the performance of completed systems monthly to ensure they are performing as expected and provides notifications if any potential performance issues are identified. SOMAH's fleet monitoring is an investment in the longevity of the solar PV systems, but it does not replace standard operating and maintenance procedures, as the system owner is solely responsible for facilitating regular maintenance.

As of December 31, 2024, 227 completed SOMAH PV systems are connected and monitored in SOMAH's fleet monitoring platform, SunSpot, which identifies solar PV systems that are underperforming compared with expected performance. If a solar PV system is identified as underperforming, then the SOMAH PA reaches out to project

contacts to discuss the underperformance and investigative steps necessary to improve system performance.

To date, the total solar generating capacity reported in SunSpot is over 29 MW CEC-AC (over 62,000,000 kWh); and overall, the fleet of completed SOMAH projects are performing at 88% of their expected level (percent of expected).

SOMAH is committed to monitoring completed systems in order to maximize system production, which translates to direct economic relief for low-income tenants. As an example of SOMAH's commitment to monitoring and maximizing system production, there have been several instances where SunSpot identified underperforming projects. After notifications were sent to project contacts and periods of troubleshooting, issues were found with inverters leading to replacement of the defective equipment under warranty at no cost to the property owners. Continued monitoring showed that system production improved after inverter replacement.

To further support completed SOMAH projects, property owners and solar contractors after installation is complete and the system is interconnected, SOMAH created resources to cover the best operations and maintenance (O&M) practices for solar PV systems and provide tips for monitoring system performance. These resources can be used to learn how an O&M plan can ensure the long-term functionality of a system and how to track system performance over the system's lifetime. Resources are created for on-site staff and those who may interact with the system regularly. After a marketing email was distributed notifying SOMAH participants about these resources, some property owners submitted TA Request Forms to request personalized support to help analyze and manage their system's performance.

Fleet monitoring data at a glance for Q3-Q4 2024:

- 227 systems monitored
- 29.8 MW of capacity
- 15.6 GWh of production
- Percentage between production and estimate 87%
- Approximate emissions avoided based on MW capacity using EPA AVERT tool: over 7,000 tons of CO_2

Figure 44 – Estimated Versus Actual System Performance
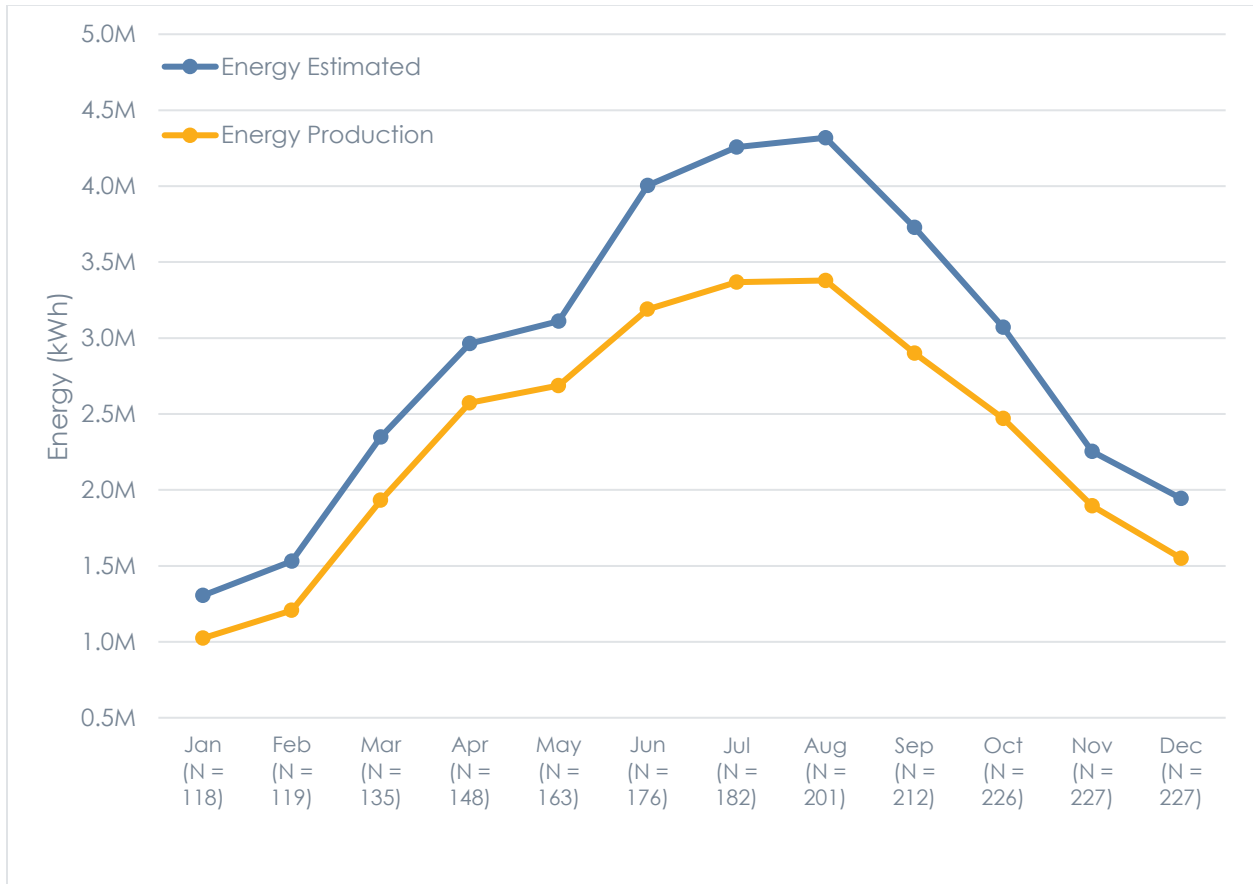
There are several factors contributing to the underperformance of SOMAH completed systems compared to their estimated production as depicted in Figure 44. In addition to seasonality and equipment failure, some systems experienced a loss in communication and not in production. Equipment failures can cause warranty claims, leading to long wait times to replace and/or repair. Approximately 116 systems received PTO in 2024 and are being monitored by SOMAH. Due to the increase in systems coming online combined with slow repair times, the number of underperforming systems grew during this reporting period. The SOMAH PA team also identified an underreporting issue with SolarEdge API that is being investigated. The monitoring software detected a wide range of production variations, from a few systems that completely lost production to systems that have been repaired and returned to normal levels. In some cases, the SOMAH monitoring software detected a loss in production, but the inverter portal did not provide any warning or error codes to contractors. The SOMAH monitoring software has been an invaluable tool in confirming SOMAH systems are running properly and ensuring tenants continue to receive long-term savings.

Figure 45 – Completed SOMAH Systems Being Monitored
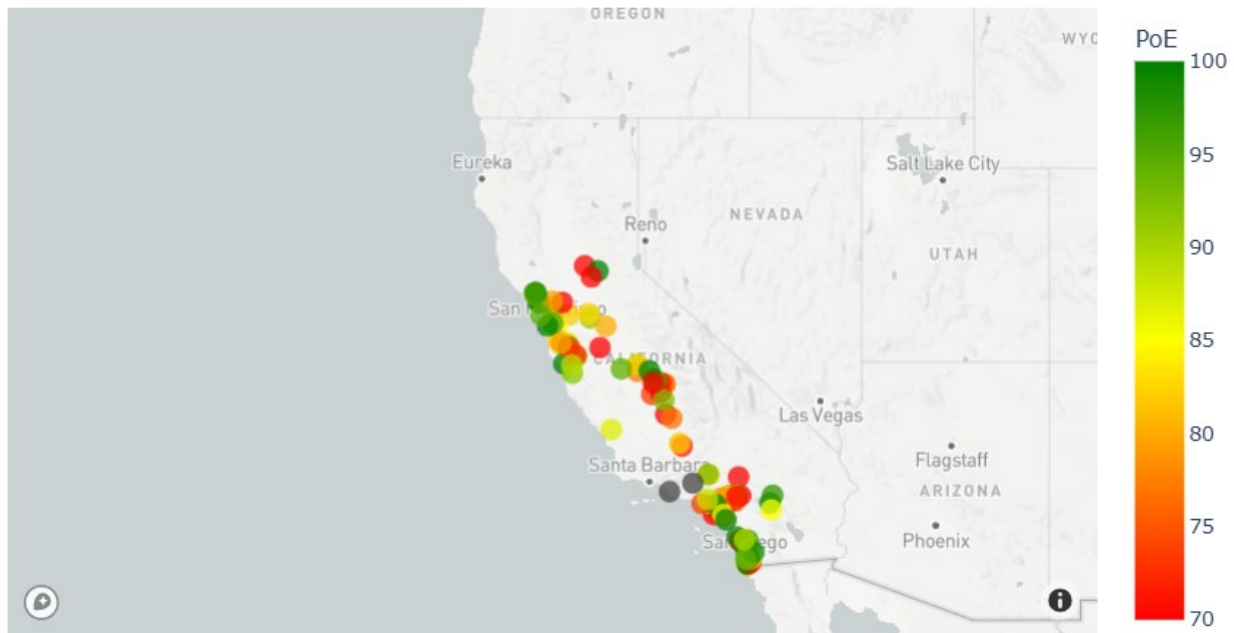
4. Program Planning and Development

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

Official Record Maintenance

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

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

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

- Special reports to the California Legislature

- Third-party evaluations and reports

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

During this reporting period, the SOMAH PA highlights: 1) an update on activities related to reporting, feedback and accountability; 2) an overview of evaluation efforts; and 3) program design updates, including the recently released CPUC Decision (D.24-11-006) that will be a primary focus for the PA's 2025 activities.

4.1 Reporting, Feedback and Accountability Mechanisms

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

4.1.1 Public Forums

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

During this reporting period, the SOMAH PA held one public forum in October. Topics covered included a general program update, an overview of Tenant Education Services, adjustments made in 2024 and expected changes to materials and delivery processes starting in 2025. Eliminating unnecessary public forums aligns with feedback from third-party evaluators and minimizes commitments from the SOMAH PA; thus, the next public forum is scheduled for Q1 2025.

4.1.2 IOU Working Group

During the reporting period, the SOMAH PA held six IOU Working Group meetings. The Q3-Q4 2024 working group meetings focused on the following topics:

- July 2024 – General program and marketing coordination updates, interconnection and bill credits, SOMAH PA overview, IOU referral process.

- August 2024 – General program and marketing coordination updates, interconnection and bill credits, SAER incentive forecast and report, SAPR apps and payment, new construction.
- September 2024 – General program and marketing coordination updates, tenant education hotline project updates, new construction, VNEM guidance.
- October 2024 – General program and marketing coordination updates, tenant education hotline project updates, new construction, VNEM bill verification.
- November 2024 – General program and marketing coordination updates, tenant education hotline project updates, utility data for HUD utility allowances, CPUC Final Decision regulatory updates.
- December 2024 – General program and marketing coordination updates, tenant education hotline project updates, long-term IOU budget forecasting, CPUC Final Decision, annual ESA/MFWB referral request.

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

4.1.3 SOMAH Advisory Groups

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

Advisory Council

The SOMAH Advisory Council (SOMAH AC) has two main purposes: 1) to ensure the voices and interests of equity-focused community advocates and key stakeholders remain at the center of the SOMAH Program; and 2) to make certain SOMAH maximizes benefits to low-income tenants and DACs by advising the SOMAH PA on program development and implementation. Since the last reporting period, there have been no changes to SOMAH AC membership. The current cohort has 11 members representing the fields of environmental justice, workforce development/labor, tenant rights and economic justice, affordable housing, tribal communities and the solar industry. The SOMAH AC meets virtually on a quarterly basis.

During this reporting period, the cohort had two quarterly joint meetings with the JTO Task Force.
Q3 2024 meeting topics included:

- A general program update and updates on outreach to different audience types.

- Breakout discussions by advisory group to elect chairs and vice chairs for each group and discuss the following topics:
  - SOMAH AC - Updates to Tenant Education services
  - JTO Task Force - Sunsetting the JTO Task Force
- Policy updates related to the SOMAH Program.

Q4 2024 meeting topics included:

- An overview of D.24-11-006 and directives for the SOMAH PA and IOUs.
- An informational session on advisory group roles and how members and the SOMAH PA are allowed to engage on policy issues.
- Breakout and full group discussions on what SOMAH AC working groups could look like in 2025.

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

Job Training Organization Task Force

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

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

To reduce staff time spent coordinating multiple advisory group meetings each quarter with overlapping meeting content, the SOMAH PA began exploring the possibility of sunsetting the JTO Task Force. The SOMAH PA received positive feedback from the Energy Division to move forward. After the proposal was shared with JTO Task Force members during the Q3 meeting, it was decided to sunset the group by the end of the year and transition four JTO Task Force members to the SOMAH AC through a formal selection process. Six JTO Task Force members completed the application and interview process, and the final four members were selected by a committee made up of SOMAH AC members in November.

The JTO Task Force was officially discontinued after the Q4 crossover meeting. The program will now move forward with the SOMAH AC as its single advisory body. For the remainder of the 2024-25 term, the SOMAH AC will consist of 15 members.

4.1.4 Third-Party Program Evaluation

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

In 2025, the SOMAH PA will continue action on the remaining and ongoing recommendations aligning with the timelines outlined in the Response to Recommendations from the 2023 Triennial Evaluation. The SOMAH PA continues to work closely with ED to identify opportunities to incorporate key recommendations into the program's overall priorities and strategic efforts. The next evaluation is slated for 2026. The SOMAH PA plans to engage with the evaluators to support data requests and feedback in response to evaluation questions in 2025. Taken together, feedback and input from key audiences, participants, stakeholders and advisors will help inform and modify program areas to ensure the approaches are successful in reaching the audiences and communities SOMAH is designed to serve.

4.2   Program Design and Updates

This section provides an overview of program design changes and prospective changes as well as updates on related regulatory activity. See Section 3.1.1, Applications and Incentive Statistics, and Section 3.1.2, Program Payments, for more information on application activity and the impacts of higher incentive rates.

The SOMAH Ruling was issued on March 5, 2023, prompting replies and potential changes in various program areas. Comments and replies from stakeholders followed thereafter. SB 355 was signed into law on October 7, 2023, and the program changes from the bill were largely implemented through Handbook 8 in February 2024. These changes were summarized for stakeholders during a session at the SOMAH public forum on February 28, 2024. The following program updates were implemented in Q1 2024 via the approved handbook:

- Extended program period from 2030 through 2032.

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

The remainder of program changes directed in SB 355, but not included in Handbook 8, such as integration of new construction project eligibility, require further direction from the CPUC before additional modifications will be made to the program. D. 24-11-006 (further outlined below) noted that specific elements of SB 355 require further consideration to determine appropriate implementation, which the CPUC will address in a successor proceeding. The Decision also acknowledged comments urging the CPUC to prioritize implementation of the remaining directives from SB 355, which it intends to do in another proceeding as expeditiously as possible.

4.2.1 Decision 24-11-006

During this reporting period, a Proposed Decision was released on September 30, 2024, as an outcome of the SOMAH Ruling from March 2023. The Proposed Decision included modifications to refine and streamline SOMAH to drive participation and improve delivery of the program's benefits, in lieu of higher solar incentives. The PA and other stakeholders submitted comments on October 21, 2024, and reply comments on October 28, 2024. The Final Decision, D.24-11-006, was then issued on November 14, 2024, after CPUC vote on November 7, 2024.

Through D.24-11-006, the CPUC has directed the SOMAH PA to include additional goals, metrics and KPIs in future Semiannual Progress Reports and forthcoming evaluations. Examples of these additional SAPR reporting points include points of interaction, listserv subscribers with crossover to SOMAH applicants, expanded webinar statistics and more.

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

PacifiCorp territories. Based on the 2025 ME&O Plan Budget Forecast, that equates to roughly $32,000.

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

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

Additional directives focused on program design and outreach include:

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

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

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

At the end of this reporting period and leading into Q1 2025, the SOMAH PA is scoping changes and building consensus on the implementation of D.24-11-006, which includes biweekly coordination meetings with the IOUs and CPUC ED. Further details on the direction for storage integration with SOMAH and the process for early payments for tribal projects will be forthcoming in the Handbook Advice Letter.

The SOMAH PA is confident these measures will increase participation and support for Liberty and PacifiCorp projects and offer greater support for contractors. Although the

tenant education requirement will be removed as of July 1, 2025, the SOMAH PA will continue to work toward and stay committed to fulfilling tenant education needs. CBO guidelines and tracking measures may shift to support current and future program needs as CBOs are encouraged to provide the bulk of the tenant education support while continuing outreach to property owners as overall programmatic capacity changes. As directed by the Decision, the PA will submit an Advice Letter outlining the directed program changes in a forthcoming Handbook 9. The SOMAH PA targets approval and implementation of the Handbook Advice Letter in Q2-Q3.

4.2.2 Program Handbook Records

This section reviews the SOMAH PA's work to update the SOMAH Program Handbook conducted during this reporting period, as well as relevant regulatory decisions not attached to the PA's work to update the handbook. Figure 46 provides a non-exhaustive overview of the SOMAH Program Handbook since the inaugural edition, including major updates by version.

Figure 46 – Handbook Versions

Version	Major Updates	Approval Date
Handbook 1 (original)	• Established original program offerings and requirements	March 2019
Handbook 2	• SOMAH & MASH stacking	May 2020
Handbook 3	• Progress payments	December 2020
Handbook 4	• Application pipeline management (lottery) • Required notification for early job trainee termination • System changes affecting incentive amounts • Assorted minor updates	May 2021
Handbook 5	• Code of conduct • Application fee waiver for target groups (i.e., DACs) • Formal program benchmark targeting 40% of projects in DACs by 2026 • Clarification of eligibility across CalEnviroScreen versions • Option to submit PPM with EECM • Minimum time requirement for progress payment filing from four to two months	May 2022
Handbook 6	• Splitting Reservation Request Milestone into two phases to streamline the application process	February 2023

	• Removal of Multifamily Affordable Housing Document Cover Sheet • Removing the requirement of checklist for program participants • Increased time for earmarked funding with Track A projects from three to six months • Adjusted timeline from reservation approval to EECM submission from two to three months • Option for SOMAH PA to perform remote site inspections at Incentive Claim	
Handbook 7	• Elimination of the annual incentive step-down • Increased incentive levels	June 2023
Handbook 8	• Extended the SOMAH Program through 2032 • Revised the Income Eligibility Pathway to require at least 66% of the property residents have incomes at or below 80% AMI • Addition of third eligibility pathway for properties owned by a California Native American tribe • Addition of fourth eligibility pathway for rental housing properties owned by a public housing authority or agency • Updating the term "building" to "property" in the definition of "Qualified multifamily affordable housing property"	February 2024

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

5. Conclusions

With influential program changes like the removal of the EPBB for projects in northern parts of the state and ongoing efforts to reduce program barriers and increase participation, the SOMAH PA continues its commitment to supporting applicants and property owners toward a bright future for all SOMAH projects. The SOMAH PA also continues to expand services to meet participant needs, as evidenced by the extensive

use of the Affordability Prescreen and high utilization of Technical Assistance and Support Services. Program directives from D.24-11-006 will play an important role in increasing program participation and positioning the program for continued success through increased transparency and improved processes. The program continues to prioritize installations for DACs and tribal communities, aiming to increase program awareness and levels of project participation among both populations. The SOMAH PA is especially focused on wider engagement with tribal entities to increase applications and remove barriers to tribal project participation.

SOMAH's annual Marketing, Education and Outreach Plan continues to guide the program's overarching outreach and marketing strategies to key audiences. Outreach efforts for 2024 were shaped by the 2023 Triennial SOMAH Evaluation Report, previous SOMAH-led primary research and stakeholder expertise. The 2024 marketing plan focused on conducting property owner outreach, developing relationships with tribes and tribal stakeholders, facilitating contractor and subcontractor diversity, conducting in-person tenant education workshops, showcasing job trainee solar career success stories and increasing stakeholder outreach. In the next reporting period, the marketing plan will focus on connecting with property owners, with an emphasis on reaching out to newly eligible property owners and property owners representing priority communities such as DACs, tribes and properties in Liberty and PacifiCorp territories. To support these efforts, the SOMAH PA plans to host a ribbon-cutting event in Liberty territory that was originally scheduled for 2024.

In the first half of 2025, the SOMAH PA anticipates a continued increase in project completion and greater use of progress payments. The SOMAH PA projects increasing numbers of new project entries in 2025 with impactful progress toward the program's 300 MW goal.

To ensure the program continues to deliver renewable energy and financial benefits to tenants and support equity through a dynamic and adaptive program, the SOMAH PA continues to engage in evaluation efforts and solicits feedback and input from CBOs, participants, stakeholders, the Advisory Council and other trusted advisors.

6. Appendix A

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

Upfront Technical Assistance

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

Reservation Request Milestone

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

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

Energy Efficiency Compliance Milestone

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

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

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

Proof of Project Milestone

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

Progress Payment Pathway

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

Incentive Claim Milestone

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

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

Waitlist

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

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

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

Other statuses

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