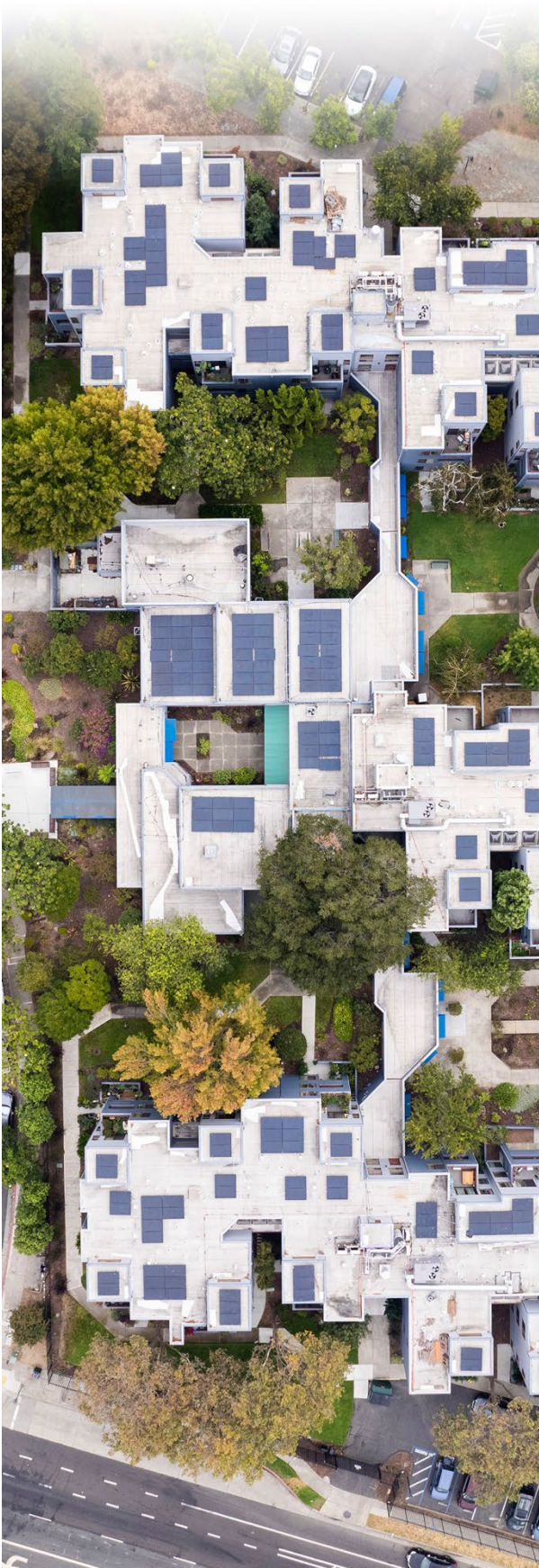




Solar on Multifamily  
Affordable Housing

# 2025 Marketing, Education & Outreach Plan

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## About the SOMAH Program

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The SOMAH Program, launched in July 2019, provides financial incentives for installing solar photovoltaic (PV) energy systems on multifamily affordable housing. SOMAH's goals include:

- Installing 300 megawatts (MW) of solar generating capacity on multifamily affordable housing statewide by 2032.<sup>1</sup>
- Expanding access to solar generation and its benefits to customers in multifamily affordable housing, where it is typically limited.
- Providing direct financial benefits to tenants in the form of energy bill credits.
- Promoting local economic development in underserved communities through solar job training opportunities and local hiring.
- Providing greater accessibility to the program through a single point of contact, full-service Technical Assistance and Support Services and coordination with other low-income programs.

SOMAH is administered by the SOMAH Program Administrator (SOMAH PA),<sup>2</sup> a team of nonprofit organizations that function as a single entity and provide a host of no-cost services to maximize community benefit and participation. Services include comprehensive [Technical Assistance and Support Services](#) for property owners, tenant education resources and paid job training. An Advisory Council provides input into program development and ensures the program maximizes benefits to the communities it serves. For more detailed information about the program and its requirements, see the [SOMAH Program Handbook](#) and the [Semiannual Progress Report \(SAPR\)](#).

The 2025 Marketing, Education and Outreach (ME&O) Plan is centered on five core goals (with corresponding objectives) concurrently engaging SOMAH's key audiences: solar contractors, property owners, job trainees, tenants and stakeholders (see Goal 5 for definition). The plan focuses on creating greater awareness of SOMAH's opportunities and benefits, using ME&O activities as a means to advance the pipeline of applications to reach the 300 MW goal. The plan also supports the SOMAH PA's priorities to center program participation in [disadvantaged communities](#) (DACs)<sup>3</sup> and to ensure diverse participation across different regions and demographics among

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<sup>1</sup> As amended by Senate Bill 355, previously 2030.

<sup>2</sup>The SOMAH Program Administrator team comprises the Association for Energy Affordability (AEA), Center for Sustainable Energy (CSE), GRID Alternatives (GRID) and California Housing Partnership (the Partnership) and is supported by subcontracted community-based organizations.

<sup>3</sup> Defined as the top 25% most pollution-burdened census tracts within CalEnviroScreen [SB 535 Disadvantaged Communities | OEHHA \(ca.gov\)](#).



SOMAH target audiences. The emphasis on supporting and increasing participation of DAC projects aligns with the formal adoption of additional program goals through D.24-11-006, including: at least 40 percent of all projects statewide will be in disadvantaged communities by the program's end and at least 30 percent of all projects in each large investor-owned utility's (IOU) territory will be in disadvantaged communities by the program's end.

## About the 2025 SOMAH Marketing, Education & Outreach Plan

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This ME&O plan will guide 2025 activities by the SOMAH PA team to reach its target audiences and support overall program goals. This plan builds on the activities and learnings from the SOMAH launch and subsequent ME&O plans, with updated strategies to address program gaps, challenges and opportunities. As with previous iterations, the 2025 SOMAH ME&O Plan seeks to increase submissions of new applications, ensure active projects receive comprehensive and equitable support, and tenants are well versed on the solar installation and how it will affect their utility bills.

### **SOMAH's 2025 ME&O Goals**

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

**Goal 2:** Retain a robust and diverse contractor base and support eligible contractor participation with new application submissions.

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

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

**Goal 5:** Ensure stakeholders are informed and actively co-marketing the program.

## 2024 Marketing, Education and Outreach in Review

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This section provides background about SOMAH ME&O activities in 2024. This past year, the SOMAH PA continued outreach and marketing efforts through a mix of online and in person activities. Digital outreach included activities such as online webinars and email marketing. In-person outreach, conducted by the SOMAH PA and its community-based organization (CBO)



partners, included Tenant Education Training workshops and attending/hosting property owner and contractor events (conferences, workshops, etc.).

These engagements allowed the PA and CBOs to help participants better understand program eligibility requirements, navigate the application process, share key program updates and provide direct outreach to owners of potentially eligible properties. Additionally, the SOMAH PA, and where applicable CBO partners, continued facilitating [Tenant Education workshops](#) to support host customers in completing the tenant education requirement and conducted a ribbon-cutting to celebrate a project's completion. These efforts were opportunities to connect with multiple audiences through attendance by property/developer staff, contractors, government stakeholders and residents, and for the PA to learn about participants' experiences with the program. This information has been used to inform messaging, enhance program resources and develop narrative-based content (success stories, blogs, testimonials). In addition, the SOMAH PA's participation in panels for partner webinars and conferences, such as the [2024 Housing California Conference](#) and the [2024 RE+Conference](#), helped expand SOMAH's outreach and co-marketing opportunities.

Key highlights from 2024 include:

- [Celebrating SOMAH's first completed Track A Project](#)  
The SOMAH PA partnered with St. Mary's Elderly Housing Corporation, CBO partner [Asian Pacific Environmental Network](#) (APEN), and solar contractor Sunrun for a ribbon-cutting ceremony to celebrate the SOMAH project at St. Mary's Gardens, an affordable housing community in Oakland, California. The 101-unit property was enrolled in SOMAH via Track A (Upfront Technical Assistance) and was community driven as it was engaged with the program through APEN. The solar PV system was designed with 100% tenant allocation. These direct bill savings through energy credits to residents are estimated to yield about \$35 a month to each household and offset about two-thirds of existing tenant usage.<sup>4</sup> SOMAH's no-cost Technical Assistance and Support Services team connected the property to energy efficiency programs, including Low-Income Weatherization Program (LIWP), Bay Area Multifamily Building Enhancements (BAMBE) Program and TECH Program, which led to the property receiving additional energy upgrades. The event was attended by several program partners and participants, and featured speakers from Sunrun; Gideon Anders, treasurer of St. Mary's Gardens Elderly Housing Corporation; SOMAH PA; Rachel Peterson, California Public Utilities Commission (CPUC) executive director; John Reynolds, CPUC commissioner; David Hochschild, California Energy Commission chair; Assemblymember Mia Bonta, 18th District; Oakland City Councilmember

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<sup>4</sup> [Sunrun Multifamily Rooftop Solar Installation Cuts Energy Bills for 100 Low-Income Homes: Sunrun Inc. \(RUN\)](#)

Carroll Fife (District 3); Joseph Wang, resident at St. Mary's Gardens; and APEN community member. To learn more about this project and watch a highlight video, click [here](#).

- **CBO ME&O Efforts Across Audiences**

SOMAH's CBO partners continued to present at property owners' facing events such as [Self Help Enterprises](#) (SHE) conducting a workshop ([California Clean Energy Incentives for Multifamily Housing Through Program Layering](#)) in partnership with TRC Companies at the San Joaquin Valley Affordable Housing Summit in September. Summit participants included elected officials, developers and CBOs from the San Joaquin Valley, with the intention to develop solutions addressing affordable housing issues. In other instances CBO partners networked rather than presenting, including [The Niles Foundation's](#) participation in [Bisnow Multifamily Annual Conference West](#) on November 13th, to engage South Los Angeles property owners around SOMAH.

Another aspect of CBO outreach is leveraging regional and local government stakeholder networks to co-market the program. These efforts resulted in SOMAH's CBO partner [OC Goes Solar \(OCGS\)](#) collaborating with the cities of Santa Ana and Irvine in presenting SOMAH to eligible property owners. These partnerships are crucial in the development and dissemination of marketing collateral to share SOMAH's impact and success to potential applicants (property owners and contractors) and affordable housing communities across California. Finally, CBO partner, Communities for Better Environment (CBE) developed a pilot program for community members to complete the SOMAH HeatSpring Academy, a virtual offering for job seekers to fulfill the prerequisite hours to become eligible to participate as a job trainee on a SOMAH project ([read for further details](#)).

- **Growth in Annual Web Traffic**

In 2024, the website had a **28.3%** increase in page views and a **32.4%** increase in users. There were **127** website visitors who filled out the eligibility form.<sup>5</sup>

- **Social Media Activity**

SOMAH's social media followers increased from **803** to **947** as of November 15, 2024, across LinkedIn, X, Facebook and Instagram. This represents an **increase of 17.9%** from 2023. During 2024, the SOMAH PA posted **282 times** across its social media platforms receiving **895** engagements with posts.

- **New Applications**

From January 1, 2024 to November 15, 2024, the SOMAH Program saw **169** new applications<sup>6</sup> adding **29 MW** of solar capacity. This increases the program's total

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<sup>5</sup> Between Jan. 1 - Nov. 15, 2024, most visited pages were: 1) the [SOMAH homepage](#) – 11,959 visitors, 2) the [Program Handbook](#) – 1,464 visitors, 3) the Property owner [program overview & requirements](#) page – 1,788 visitors and 4) the [About](#) page – 1,981 visitors

<sup>6</sup> As of November 15, 2024, 17 new applications were canceled or withdrawn.



reserved and installed capacity to **94 MW**. Of these new applications, **13 MW** will be installed at properties located in DACs. These new projects add to the **180** projects that have been completed and paid, with **147** more nearing completion.

- **Tribal Outreach and Engagement Efforts**

Throughout 2024, the SOMAH PA prioritized ME&O activities to tribes, tribal entities, and tribal co-marketing partners to prioritize awareness and utilization of SOMAH incentives. In total, the SOMAH PA conducted direct outreach calls and/or emails to **109** federally recognized Tribes and **60** non federally recognized Tribes in California. Furthermore, **3** Solar Preview Reports were created and disseminated to prospective tribal leads to showcase the benefits of solar installation through the SOMAH Program. The SOMAH PA also collaborated with a member of the GRID Alternative's Tribal Program Team to refine messaging strategies and build lasting connections with tribal communities, while working with the PG&E, SCE, and PacifiCorp Tribal Liaison teams to present updates on SOMAH and engage tribes through IOU newsletters and direct email referrals. Additionally, the SOMAH PA coordinated with other clean energy programs, such as Disadvantaged Communities Single-family Solar Homes (DAC-SASH) and the Tribal Grant Solar Accelerator Fund, to explore opportunities for partnerships, referrals and co-marketing efforts to ensure mutual success. Lastly, a strong emphasis was placed on paid marketing opportunities and tailored marketing materials, including the issuance and distribution of SOMAH Program ads through Native News Online that ran for four weeks in July 2024 as well as the distribution of the Powwow Magazine at the Gathering of Nations Pow Wow on April 25 - 27, 2024. The SOMAH PA also developed a comprehensive program flyer specifically for tribal needs in January 2024 and published an online article highlighting the Bishop Paiute tribal project, along with a success story and video from GRID Alternatives, in April 2024.

## Property Market Analysis & Program Participation

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In 2024, the SOMAH PA conducted comprehensive research on the multifamily affordable housing market, building upon earlier analyses conducted by the California Housing Partnership. This research, combined with the PA's audience-specific expertise, plays a crucial role in shaping ME&O strategies. This analysis was expanded to regions with high concentrations of SOMAH-eligible DAC properties to develop targeted marketing and outreach strategies. Additionally, this research focused on underserved geographic regions and provided insights on specific historically underserved

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subpopulations, including tribal entities and rural housing properties. The 2024 market research also included an analysis of the Low-Income Housing Tax Credit (LIHTC) program, with information on the current number of existing SOMAH-eligible LIHTC properties.

### SOMAH Eligible Properties Map

The SOMAH PA continues to use the California Housing Partnership's preservation database to maintain the SOMAH [Eligible Properties Map](#) – an interactive tool that allows users to search for potentially eligible properties across the state. This tool features four different data tabs including, Disadvantage Communities, Electric Utilities, Legislative Districts and Lead Generation Counties. Within each tab, the map can be filtered to show the number of affordable housing units per property, if the property is located in a DAC and its street address. The PA updates the map quarterly to include the status of a property's enrollment in the SOMAH Program (i.e., SOMAH enrolled vs. non-SOMAH enrolled) and has developed a user guidebook to ensure the map serves as a lead generation tool for contractors and stakeholders. Given the pending changes outlined in Senate Bill 355, the PA intends to update the data to include potentially eligible new construction once programmatic changes are implemented.

### Analysis of Potentially SOMAH-Eligible Properties

Analysis of the Partnership's Affordable Housing Preservation Database reveals there are approximately **4,307**<sup>7</sup> existing properties potentially eligible for SOMAH that meet the following program requirements: are existing buildings, 5+ units, 10+ years remaining on deed restriction, IOU or community choice aggregator (CCA) customer, and either meets affordability requirements, is located in a DAC, is owned by a public housing authority or a Tribal entity.

As of November 15, **649** properties have already enrolled in the SOMAH Program, bringing solar energy to **49,197** tenants. Of the **649** properties, **197 (30%)** are located in DACs. In keeping with the pursuit to target priority communities, the SOMAH PA is putting special focus on outreach to these properties to increase DAC participation to **40%** of all enrolled projects by 2032.

It's important to note that the potentially SOMAH-eligible database does not fully exclude master metered properties or properties that have used the Multifamily Affordable Solar Housing (MASH) Program or installed solar through other programs such as the Low-Income Weatherization Program (LIWP). As such, properties included in this database are considered "potentially eligible" as a full eligibility review with a submitted SOMAH application is necessary to confirm criteria are satisfied. It is important to note that this is public agency data that is not independently verified.

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<sup>7</sup>An additional 160 properties that were not identified in the Partnership's Housing Preservation Database have enrolled in the SOMAH Program, bringing the total universe of affordable housing properties to 4,467. The Market Assessment will utilize the affordable housing data counts provided by the California Housing Partnership.

### Expanded Eligibility: Senate Bill (SB) 355

The SOMAH PA implemented the eligibility updates outlined in SB 355 in Q1 2024 through the revisions in Handbook 8. These updates include:

- Revising the income thresholds to require that at least **66%** of units are at or below **80%** AMI.
- Streamlining eligibility for Tribal entities and public housing agencies.
- Allowing a broader range of building types to participate including manufactured homes and mobile home properties.

SB 355 also introduced eligibility for new construction projects to participate in the program, which requires additional regulatory guidance from the CPUC before it becomes a formally available pathway to participate in SOMAH.

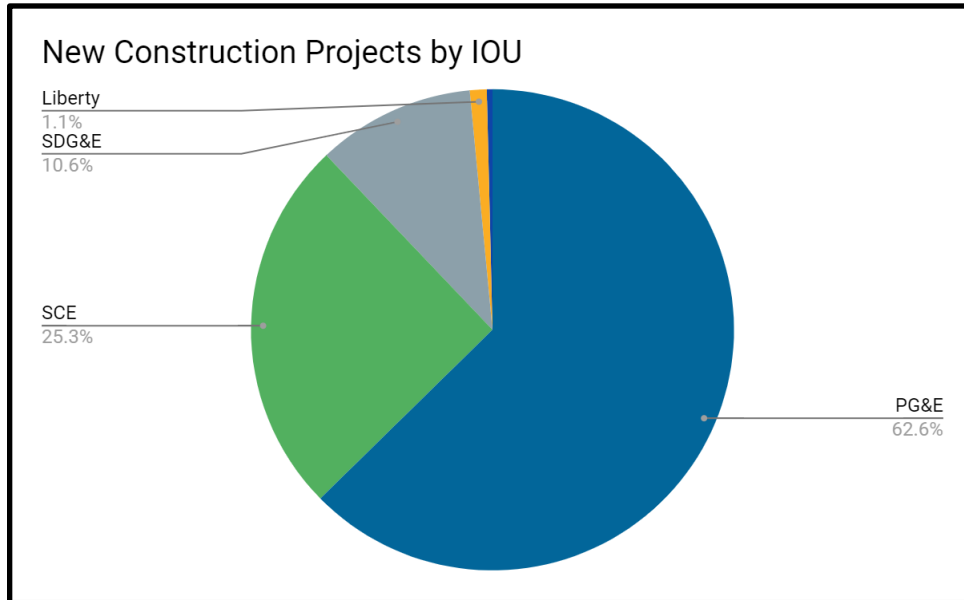
As a result of this expanded eligibility, **241 (5%)** properties owned by public housing authorities (PHAs) and **8 (0.18%)** properties owned by Tribes and/or Tribal housing authorities will benefit from streamlined eligibility to participate in the program.

### Pending Eligibility: New Construction Pathway on the Horizon

With a new construction pathway on the horizon, SOMAH is beginning to assess its potential impact. Allowing new construction projects to leverage SOMAH Technical Assistance and Support Services early in the design phase is crucial for ensuring projects are solar-ready and can maximize available roof space, thus increasing energy offset for residents.

Current data on new construction reveals that at least **265** additional projects have not yet been placed in service. Major funding sources for these projects include: LIHTC (n = **223**), HCD (n = **51**), CalHFA (n = **22**) and HUD (n = **3**). The breakdown by IOUs is as follows: PG&E (n = **166**), SCE (n = **67**), SDG&E (n = **28**), Liberty (n = **3**) and PacifiCorp (n = **1**). Of the **265** total new construction projects, **68 (25%)** are located within disadvantaged communities.

Figure 1: New Construction Projects by IOU

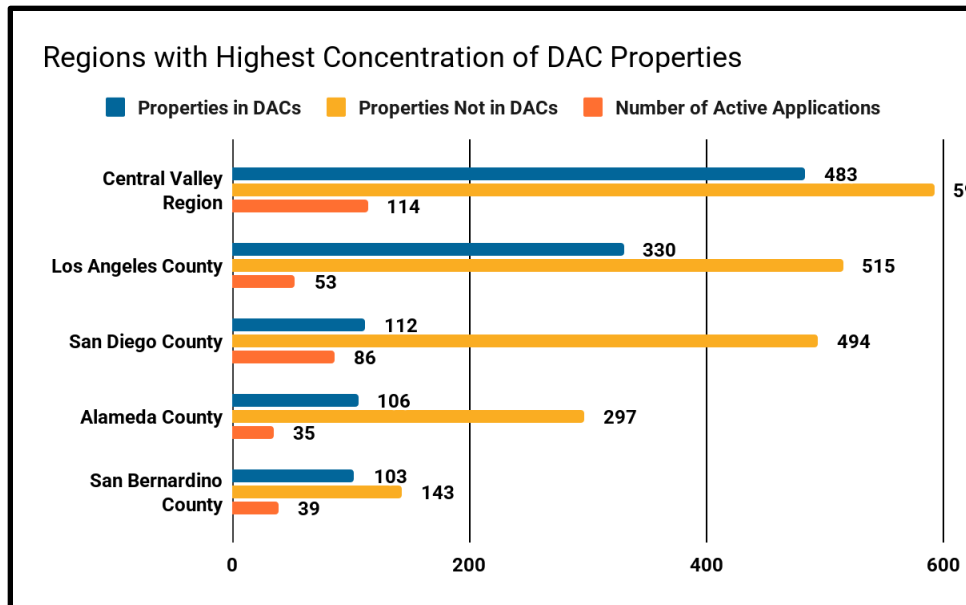


### Properties in DACs and High-Priority Regions

Approximately **36% (1,561)** of the remaining potentially SOMAH-eligible properties (non-participants) are in DACs as defined by CalEnviroScreen. The Central Valley has the highest concentration of potentially SOMAH-eligible DAC properties (**483**). Other regions of focus with high concentrations of DAC properties include Los Angeles, San Diego, Alameda and San Bernardino counties. As the SOMAH PA continues to develop outreach strategies to boost program participation in DACs, the Central Valley, Los Angeles, San Diego, Alameda and San Bernardino regions<sup>8</sup> remain high priorities.

<sup>8</sup> SOMAH's definition of Central Valley includes the following counties: Fresno, Kern, Kings, San Joaquin, Tulare, Stanislaus, Madera and Merced.

Figure 2: Regions with Highest Concentration of Properties in DACs

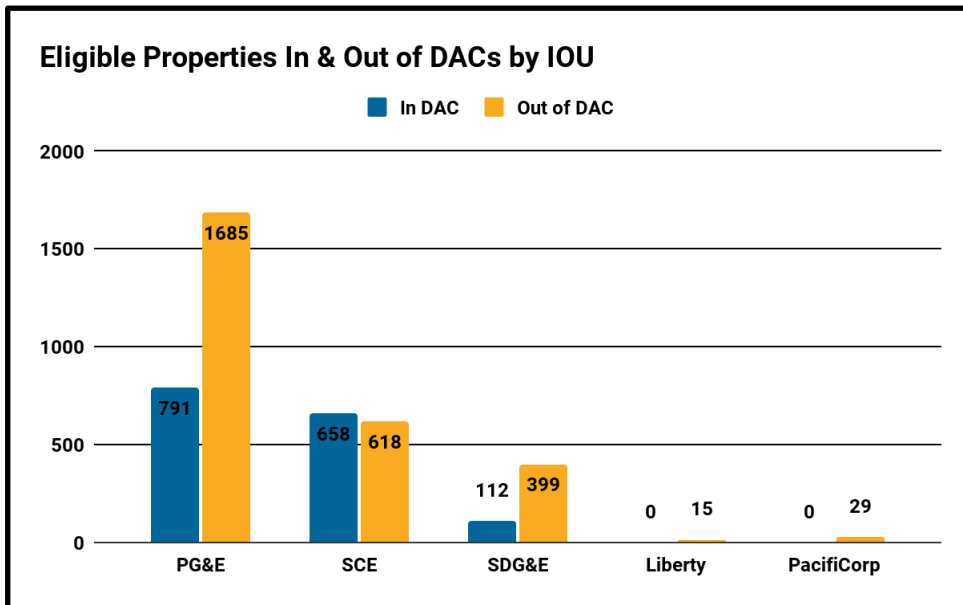


SOMAH's expanded eligibility from SB 355 includes an explicit pathway for California Native Tribes to participate in the program. As a result of these developments, it is now easier for up to **109** federally recognized Tribes and **65** non-federally recognized Tribes in California to apply for SOMAH incentives. Moving forward, the SOMAH PA will continue to gather data on Tribal multifamily affordable housing stock throughout the state, such as monitoring the California Department of Housing and Community Development's housing pipeline, to inform direct outreach strategies around engaging Tribal entities.

### Analysis of Active SOMAH Applications

As of November 15, there are **(649) active SOMAH applications**. Among the active SOMAH applications, approximately **30% (197)** are for properties in DACs, which is just below the **36%** overall share of potentially eligible properties in DACs. Analysis of active SOMAH applications shows that, on average, each IOU's share of applications is roughly proportional to their overall share of potentially eligible properties in DACs. However, recognizing the potential for further impact, the SOMAH PA is proactively planning to enhance outreach efforts specifically aimed at increasing enrollment across PG&E, SCE and SDG&E for DAC properties. This initiative aims to surpass mere alignment with averages, ensuring a targeted and amplified approach to maximize participation for underserved communities.

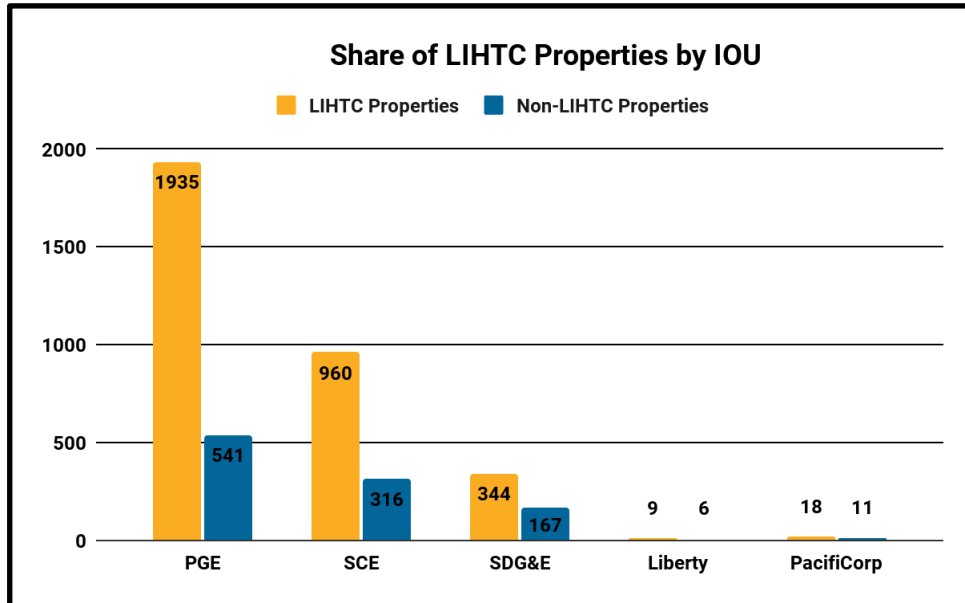
Figure 3: Comparison of SOMAH-Eligible Properties In & Out of DACs by IOU



### Affordable Housing Financing Sources: LIHTC’s Important Role

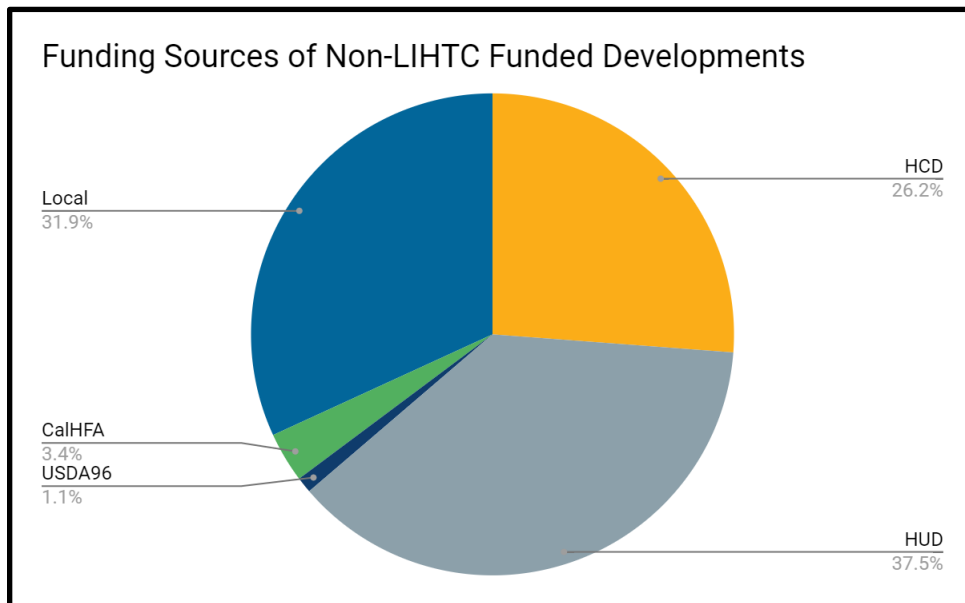
The Low-Income Housing Tax Credit (LIHTC) is one of the state's largest funding sources for affordable housing development. Approximately **75% (3,266)** of potentially SOMAH-eligible properties are financed through the LIHTC program. As such, the LIHTC program serves as a great pipeline of potentially eligible properties for the SOMAH Program. Of the total LIHTC properties, **1,877** properties are leveraging financing in addition to LIHTC from additional affordable housing agencies, including U.S. Department of Housing and Urban Development (HUD), California Department of Housing and Community Development (HCD), U.S. Department of Agriculture (USDA) and California Housing Finance Agency (CalHFA). Co-leveraging multiple financing sources may increase the likelihood of qualifying for SOMAH due to the availability of multiple regulatory agreements. Historically, LIHTC developments have been the most straightforward to qualify for the program, as the income and affordability term requirements align with those of SOMAH.

Figure 4: Share of LIHTC Properties



Of the **1,041** non-LIHTC funded properties, other common financing sources include HCD (n = **296**), HUD (n = **424**), USDA (n = **96**), CalHFA (n = **38**) and various state and local sources (n = **360**).

Figure 5: Funding Sources of Non-LIHTC Funded Developments



# 2025 Overarching Priorities, Marketing Strategy, Goals & Objectives

The SOMAH Program's ME&O priorities, goals and objectives focus on outreach to increase SOMAH applications and support applicants in successfully completing projects once enrolled. These efforts seek to 1) ensure the state's most under-resourced communities are meaningfully engaged and able to access SOMAH's benefits, 2) emphasize equity and community benefits and 3) prioritize strategic partnerships with groups already working with SOMAH's priority populations, including CBO partners. The SOMAH 2025 ME&O Plan will continue to focus on building the program's pipeline of property owners and contractors, increasing SOMAH applications through its no-cost Technical Assistance and Support Services, hosting ongoing audience- and program-specific webinars/events and developing and disseminating materials tailored for various audiences including tenants, job trainees, job training organizations, property owners and contractors.

Lastly, since program launch the SOMAH PA has strategized around increasing participation in gap regions (Central Valley, Northern California, Tribal communities, Central Coast). These communities are areas the PA has identified needing more coverage to raise program awareness and participation. This is accomplished with the help of partners and other ME&O tactics to support the PA in reducing these gaps, through participating in and/or leading outreach in these regions.

## SOMAH's 2025 and Long-Term Overarching Priorities

- 1. Recruiting and Retaining Property Owners and Contractors*  
SOMAH's no-cost [Technical Assistance \(TA\) and Support Services](#) are key to increasing overall program participation as well as expanding participant diversity. These services provide start-to-finish support for property owners and contractors and help tenants and job seekers understand and access program benefits. The SOMAH PA will incorporate a variety of ME&O tactics to offer and promote these services to SOMAH audiences (**see 2024 Goals 1-5 activities section for details**). Additionally, the SOMAH PA will focus on working more closely with participants who manage larger portfolios of affordable multifamily properties.
- 2. Prioritizing DACs and Ensuring Community Benefits*  
Low-income affordable housing residents, especially working-class families of color, have a high energy burden and have historically lacked access to clean energy solutions while living in some of the state's most polluted neighborhoods. DACs are not just low-income communities – they are environmental justice communities that experience environmental racism through the disproportionate weight of multiple sources of pollution. The SOMAH Program's efforts are geared

toward ensuring that these communities are included in the just transition to renewable energy.

### 3. *Increasing Tribal Housing Participation*

CalEPA's 2023 expansion of SOMAH eligibility to include properties on lands under control of federally recognized Native American Tribes<sup>9</sup> via its designation of Tribal housing as a DAC is an area of focus the SOMAH PA will continue navigating. [D.24-11-006](#) directs the SOMAH PA to provide an Early Incentive Payment Pathway for Tribal Projects. This directive intends to remove a financial barrier to Tribal participation by providing 50% of the incentive earlier in the project process. These resources will support the SOMAH PA to continue its outreach to Tribal housing, attending forums and seeking out learning opportunities on best practices to engage Tribal housing entities and developing a [Tribal microsite](#) on SOMAH's website (**see Marketing section for details**).

### 4. *Collaborating with Strategic Partners*

SOMAH is a large, multifaceted program that requires educating and engaging different audiences to achieve diverse participation and make progress/complete objectives for each goal. Primarily efforts help expand SOMAH's reach and accountability to the communities it serves. Additionally, this foundation is important in funneling new projects into the pipeline, while ensuring successful project completion once enrolled. To do this, the SOMAH PA relies on partnerships with CBOs and job training organizations (JTOs), as well as co-marketing collaborations with IOUs, affordable housing associations and local/regional government entities. As the program continues to grow, and the SOMAH PA builds on lessons learned, the goals of these efforts have also evolved. The SOMAH PA intends for benefits of the program to equitably reach all participants: property owners, contractors, job seekers, and tenants. The SOMAH PA's continued partnership with eight CBOs across California are integral to ensuring this is accomplished. CBO partners include Asian Pacific Environmental Network (APEN), California Environmental Justice Alliance (CEJA), Communities for a Better Environment (CBE), Community Environmental Council (CEC), Environmental Health Coalition (EHC), Self-Help Enterprises (SHE), OC Goes Solar (OCGS) and The Niles Foundation (TNF). Since the inception of this program, CBO partners have held numerous scopes in alignment with program support needs. In 2025, these scopes will primarily focus on property owner outreach and tenant education, while supporting workforce development and local government outreach to a lesser extent.

## SOMAH's 2025 Marketing Strategy

The SOMAH PA maintains ongoing efforts to engage contractors, multifamily affordable housing property owners, Tribal members, tenants, JTOs, job trainees and various stakeholders (regional and local government agencies, elected officials, IOUs and

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<sup>9</sup> As seen in Figure 2 "Eligible Properties In & Out of DACs by IOU," PG&E and SCE service territories have higher numbers of DAC properties. Therefore, outreach in these service territories will be higher.



CCAs) with vested interest in SOMAH's outcomes. This marketing strategy considers factors such as audience (including segmented audiences within larger audience categories), location (e.g., Tribal communities, DACs and utility territories), language, accessibility and specific campaign goals (e.g., increasing general awareness, driving attendance to specific events and/or increasing participation in specific program areas).

The PA intends to expand the reach of the program through success stories, case studies and participation in ribbon-cutting events, when possible, to ensure its goals around equity and accessibility are achieved.

The following points give a high-level summary of the key marketing strategies the PA will use in 2025, building on lessons learned from outreach and activities in previous program years.

- *Narrative-Based Content*

- Continue development of narrative-based content (success stories, blogs, articles, etc.). These efforts are timely and relevant, highlighting the diversity of projects and participants' experiences to ultimately encourage other eligible properties to enroll in the program.

Including the following topics:

- New construction and early payments (including early payments for Tribal Housing participants and pending Commission direction from SB 355)
- Subcontractors
- Diverse contractor and property ownership type
- Geography – within CBO service areas, in Liberty or PacifiCorp regions and/or areas not previously highlighted
- Public Housing Authority (PHA)
- Projects leveraging ITC adders
- Disadvantaged communities (DACs)
- Job trainees
  - tenants
  - justice impacted

- *Direct Outreach*

- Organize and execute both in-person and virtual events to speak directly with impacted community members, particularly those living or working in DACs.

This includes:

- On-site events (e.g., ribbon-cutting<sup>10</sup> ceremonies, tenant education workshops)

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<sup>10</sup> Within the coming year the SOMAH PA has forecasted partnering with two completed projects to lead a ribbon cutting. This is not inclusive of ribbon cuttings that the SOMAH PA is invited to but not a part of hosting.

- Webinars (i.e., tenant education workshops, presentations and audience-specific trainings)
- Trade and community conferences
- *Website Updates*
  - Continue updating the website by adding educational resources and unique and credible testimonials to keep audience members engaged and interested in the program. As part of this effort, a dedicated page specifically for Tribes has been developed under the Property Owner dropdown, which will make it easier for them to access relevant program information. This targeted approach will enhance the website's usability and ensure that tribal stakeholders can quickly find the resources most pertinent to their needs.
- *Paid Ads*
  - Leverage Google search keyword ads for education, awareness and lead generation.
- *Organic Social Media*
  - The SOMAH PA has a social media presence on LinkedIn, X, Facebook and Instagram. The 2025 organic social media will include the following:
    - Maintain up-to-date platforms with latest events and content updates.
    - Leverage social media presence of partners and stakeholders.
    - Continue to leverage industry-related hashtags and topics to increase general program awareness.
    - Continue to add and follow relevant organizations on social media channels, including tribal groups, CBOs, affordable housing organizations, energy efficiency programs, government organizations, etc.
- *Earned Media*
  - Leverage local and trade media to raise awareness of the program with prospective applicants and allies.
  - Press releases and press conferences: Use project launches, completions and milestones to create media opportunities featuring partners, CBOs and impacted community members.
  - Pitch local success stories to local press, including print publications and television stations with particular focus in gap regions and DACs.

- *Email Marketing*
  - Continued use of the resource library to develop multiple email marketing nurture campaigns for property owners and contractors.
  - Continue email marketing campaign for host customers.
  - Continue notifying email subscribers about program changes, events and successes through biannual eNewsletter and regular program announcements.

### SOMAH's 2025 ME&O Goals

1. **Goal 1:** Engage property owners to build and maintain a multiyear pipeline of diverse projects.
2. **Goal 2:** Retain a robust and diverse contractor base and support eligible contractor participation with new application submissions.
3. **Goal 3:** Ensure sufficient job trainee participation and preparation for SOMAH job training opportunities and relevant careers.
4. **Goal 4:** Educate SOMAH-eligible tenants and tenants living in participating SOMAH properties about the program and how to maximize their benefits.
5. **Goal 5:** Ensure stakeholders are informed and actively co-marketing the program.

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

### Overview

In 2024, the new eligibility pathways established by SB 355 became effective, broadening access to SOMAH and enabling the program to reach a broader range of properties. The updates, including an expanded AMI threshold and streamlined requirements for properties owned by public housing authorities and Tribal entities, support SOMAH's ability to enroll more applications compared to recent years, rebounding from the application slowdown that began in late 2020/early 2021. As of November 15, 2024, **649** properties are actively enrolled in SOMAH benefitting **49,157** tenants across the state. Over the course of 2024, over **40** Technical Assistance and Support Services requests were submitted. Furthermore, the SOMAH PA has received and created **47** Solar Preview Reports that help to increase transparency around potential benefits and costs from participating in SOMAH. Although SOMAH observed a steady increase in new applications in 2024, the SOMAH PA acknowledges the ongoing need to identify eligible properties and support their enrollment in order to reach 300 MW of installed solar capacity by 2032.



## Property Owner Outreach

As of November 15, 2024, the SOMAH PA conducted outreach to a total of **315** affordable housing organizations across the state, including **177** affordable housing developers in the SCE territory. Within this extensive outreach effort, the PA made connections with **41** housing authorities. To expand the program's marketing reach and bolster awareness, the SOMAH PA continued an ongoing property owner email nurture campaign coupled with strategic paid advertising. Emails associated with property owners received ongoing email marketing campaigns highlighting the following items: SOMAH Overview Video; Property Eligibility Requirements eBook; Trolley Trestle Ribbon-Cutting Success Story; Prescreen Service; Upfront TA Service Explained eBook; Costs, Incentives & Financial Basics eBook; and PowerClerk Tutorial Video. These initiatives helped to secure **69** new SOMAH email subscribers as of November 15, 2024.

Additionally, the PA hosted and supported property owner presentations aimed at increasing program awareness and adoption, while also building upon the expertise of affordable housing staff. These information sessions included:

- *Making Solar Easy with SOMAH's Technical Assistance and Support Services* (April 10, 2024)
  - 5 attended
- *Solar on Multifamily Affordable Housing Program Workshop* in partnership with the Kennedy Commission and OCGS at the City of Santa Ana (April 25, 2024)
  - 16 attended
- *Solar on Multifamily Affordable Housing Program Workshop* in partnership with the City of Irvine and OC Goes Solar (August 7, 2024)
  - 32 attended
- *Decarbonization Programs Workshop* in partnership with the San Diego Permanent Housing Learning Collaborative (October 23, 2024)
  - 20 attended
- *Developers Forum* in partnership with the San Diego Housing Federation (October 28, 2024)
  - 20 attended
- *PG&E SPOC Energy Programs* Webinar (November 14, 2024)
  - 22 attended

In 2024, the SOMAH PA attended **two** key affordable housing conferences: *Housing California* and the *Southern California Association for Non-Profit Housing (SCANPH) Annual Conference*. These events were valuable for networking, sharing insights from program implementation and promoting the SOMAH Program to a broader audience of affordable housing professionals and stakeholders. The Housing California conference, the largest affordable housing conference in the state, offered an opportunity to connect with statewide affordable housing providers. Housing California featured panel sessions on the Inflation Reduction Act (IRA) and solar tax credits as well



as strategies for electrifying affordable housing. These panels were ideal for highlighting available SOMAH incentives and Technical Assistance and Support Services. The SCANPH conference provided an opportunity to connect with property owners representing regions with low SOMAH enrollment including Los Angeles County, Inland Empire, and Orange County.

The 2023 Triennial SOMAH Evaluation Report provided several recommendations to enhance the program's efforts in establishing a pipeline of multiyear projects. The SOMAH PA is committed to prioritizing these suggestions by concentrating on creating meaningful opportunities for direct outreach with property owners and continuing to provide Technical Assistance and Support Services to both prospective and enrolled applicants. Some of the efforts that have been made to fulfill this commitment in 2024 include:

- Engaging in direct outreach to property owners and regularly updating SOMAH's Salesforce database to ensure accurate contact information.
- Conducting outreach to potentially recoverable applications that have been canceled and withdrawn.
- Actively participating in events where property owners are involved, including those in collaboration with SOMAH's community-based organization partners.
- Offering support to property owners who have host customer-owned systems to prevent application cancellations, including the development of a solar monitoring guide.
- Collaborating with affordable housing funding agencies like Fannie Mae to address eligibility challenges and to streamline enrollment in the SOMAH Program.

### Challenges and Lessons Learned

Although the program has advanced considerably, challenges remain in enrolling qualified applicants. For instance, out of **72** eligibility prescreen submissions received in 2024, only **39** projects fully met SOMAH's eligibility criteria. The remaining **33** applications did not qualify for the program for various reasons, such as the developments being new construction projects, master metered or lacking active regulatory agreements that would meet SOMAH's eligibility requirements.<sup>11</sup> The SOMAH PA is committed to reconnecting with projects that were previously ineligible if they become eligible in the future due to changes in the eligibility criteria.

The SOMAH PA contacted **169** Tribes and Tribal housing authorities throughout California. Preliminary discussions have started between SOMAH and **three** Tribes that

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<sup>11</sup> See [SOMAH Program Handbook Section 2.2.1](#).



have not participated in SOMAH previously. The PA continues to explore more outreach strategies to determine best practices for messaging and communication. One of these methods includes compiling Solar Preview Reports to send to potentially eligible SOMAH properties. The PA also continues research to improve eligibility pathways for Tribes. Early findings reveal that very few Tribes in the state currently possess qualified multifamily affordable housing that aligns with SOMAH's criteria. Historically, Tribes have faced various obstacles when participating in multifamily affordable housing programs, including competitive funding applications that do not consider Tribal timelines and/or sovereignty and multifamily housing programs not offering enough long-term support for property management. Due to the limited number of eligible projects available for enrollment, the SOMAH PA has concentrated on identifying these barriers and formulating an appropriate marketing strategy for engaging with Tribes in order to build awareness and utilization of SOMAH incentives to install solar on eligible existing and/or future multifamily affordable housing tribal projects. Additionally, we aim to build trust and foster long-term relationships with Tribal communities to support the enrollment of future prospective projects in SOMAH, should they meet the program's eligibility requirements.

### **Proposed Program Changes**

In Q1 2024, the SOMAH PA implemented key updates from SB 355, expanding eligible building types, increasing flexibility for properties with incomes at or below 80% AMI, and simplifying enrollment for public housing authorities and Tribal properties. These changes have broadened outreach, enabling the program to engage more properties and better leverage leads from initiatives like the Low-Income Weatherization Program (LIWP). While the new construction pathway outlined in SB 355 is not yet active, there is strong interest from property owners in enrolling new construction projects once this offering becomes available.

Additionally, D.24-11-006, which was released and approved in Q4 2024, introduces several directives aimed at enhancing program accessibility and supporting deeper building resiliency. These include expanding SOMAH incentives to cover battery storage for qualified projects, automatically opting all applications to utilize the Progress Payment Pathway, removing the EPBB methodology from incentive calculations in regions such as Liberty and PacifiCorp, and expanding eligible project costs to include essential building upgrades that may include roof replacements and electrical infrastructure improvements. The SOMAH PA will host a public workshop to gather feedback from property owners and key stakeholders to inform how the offerings from D.24-11-006 are designed. Overall, these updates enhance accessibility, making it simpler and more valuable for more property owners to take advantage of SOMAH incentives for both solar PV and battery storage.

## Priorities and Key Strategies for Property Owners

Property owners are increasingly familiar with integrating sustainability upgrades into their portfolios, driven in part by state mandates requiring solar installation on new construction buildings and all-electric readiness under Title 24 building codes. As solar energy becomes mandatory for new multifamily projects, property owners are also seeking solutions to address rising utility costs and enhance the resilience of existing properties in their portfolios. Programs like SOMAH are vital for enabling solar adoption across affordable housing properties, particularly as multifamily affordable housing often faces financial constraints, such as limited operating reserves, that make the upfront costs of solar PV and battery storage installations prohibitive. Without incentives, property owners may struggle to invest in these technologies, despite their long-term benefits for both tenants and building owners. Additionally, because solar installation requirements are relatively new, many property developers lack experience in overseeing such projects within their portfolios. The process of installing solar often involves multiple communication touchpoints across various stakeholders, making the role of technical assistance crucial to a successful outcome. The SOMAH Program Administrator (PA) is focused on raising awareness of the program among prospective property owners, particularly those in DACs, Tribal territories, and rural areas like Liberty and PacifiCorp service regions. To ensure successful adoption, the PA offers Technical Assistance and Support Services to guide owners through each step of a project's life cycle. Furthermore, the PA aims to continue engaging with participating property owners to facilitate the enrollment of additional properties in the program, establishing a sustainable, multiyear pipeline of solar projects that will help expand access to clean energy and battery storage for affordable housing across the state. Goal 1 of the SOMAH program outlines a variety of goals, strategies, and objectives designed to foster increased program enrollment throughout the remainder of the program's duration, ensuring long-term impact and continued growth, including:

- Conduct outreach to newly eligible participant groups identified in SB 355 (i.e., public housing authorities, Tribal entities, properties where 66% of residents are at or below 80% AML, etc.) to encourage program enrollment.
- Prioritize outreach such as direct emails and virtual and in-person presentations to property owners representing priority communities such as DACs and properties located within the Liberty and PacifiCorp utility territories.
- Communicate programmatic changes outlined in D.24-11-006 to property owners and prospective applicants, including the expansion of SOMAH incentives to cover battery storage, seeking input from stakeholders on the design of future program offerings where possible.



- Re-engage property owners with canceled or withdrawn applications, where eligible, to capitalize on existing leads and encourage re-enrollment in SOMAH.
- Increase awareness and use of SOMAH's Technical Assistance and Support Services.
- Collaborate with clean energy and energy efficiency programs, IOU SPOC teams, and key stakeholders to foster cross-program referrals while continuing to co-market with organizations serving property owners in priority groups (i.e., DACs, Tribes, Liberty, PacifiCorp, etc.) and engage in affordable housing events in regions with low SOMAH participation.

**SMARTIE Objective(s): All to be achieved by November 2025**

1. Conduct direct outreach to at least 200 affordable housing organizations, including at least 30 public housing authorities. Outreach will prioritize property owners with newly eligible properties and properties in DACs and targeted communities, such as the Central Valley, Los Angeles, Orange County, and Liberty and PacifiCorp utility territories. The SOMAH PA will conduct relevant activities as will its CBOs and other co-marketing partners.
2. Conduct outreach to approximately 180 Tribes listed on the Native American Contact list maintained by the Native American Heritage Commission and foster relationships with at least three Tribal entities with potentially eligible multifamily affordable housing properties.
3. Maintain the utilization of SOMAH's Technical Assistance and Support Services by securing at least 100 technical assistance requests, including a minimum of 40 Solar Preview reports by November 15, 2025.
4. Disseminate introductory direct outreach emails to 100% of property owners, property managers, and Tribal members who fill out a Check Eligibility Form or subscribe to the email listserv.
5. Present on SOMAH at a minimum of two external webinars, presentations, and/or panels for property owners and public housing authorities with a prioritization on attendance for property owners with properties in DACs or in other priority regions such as Liberty and PacifiCorp.
6. Build relationships with at least two new property owner co-marketing partners in application gap regions, such as the Central Valley, Los Angeles, Inland Empire, San Diego, rural housing (serving PacifiCorp and Liberty territories) and Tribal housing entities.
7. Have a presence at key statewide and regional affordable housing conferences by participating in at least two conferences with property owners representing priority regions and groups such as Southern California, Central Valley, and rural areas as well as Liberty, PacifiCorp, and Tribes.



2025 Audiences and Main KPIs (key performance indicators)

Audiences

- Affordable housing owners, including:
  - Nonprofits
  - For-profits
  - Faith-based housing
  - Rural housing
  - Farmworker housing
- Public housing authorities (PHAs)
- Tribal housing entities
- Property management companies
- Property owners not subscribed to the SOMAH email list
- Property owners subscribed to the SOMAH email list
- Property owners with canceled and/or withdrawn applications
- Affordable housing associations including:
  - Housing California (HCA)
  - Non-Profit Housing Association of Northern California (NPH)
  - Southern California Association for Non-Profit Housing (SCANPH)
  - San Diego Housing Federation (SDHF)
  - California Coalition for Rural Housing (CCRH)
  - San Joaquin Valley Housing Coalition (SJVHC)
  - Kennedy Commission
  - California Association for Housing Authorities (CAHA)

Main KPIs

- Number of new applications
- Number of new DAC applications (including Tribal)
- Number of new email subscribers
- Number of email subscribers open rates
- Number of new interest calls
- Number of webinars and attendees
- Number of unique organizations contacted Number of diverse property owner types contacted (housing authorities, Tribal housing entities, etc.)
- Number of website visits from paid media campaigns
- Number of projects requesting or using SOMAH Technical Assistance and Support Services
- Percent of applications (in Liberty and PacifiCorp territories) requesting or utilizing SOMAH services (e.g., pre-screening, technical assistance).

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| <ul style="list-style-type: none"><li>● <i>State and federal housing finance agencies such as:</i><ul style="list-style-type: none"><li>○ <i>Tax Credit Allocation Committee (TCAC)</i></li><li>○ <i>California Department of Housing and Community Development (HCD)</i></li><li>○ <i>Fannie Mae</i></li></ul></li><li>● <i>Co-marketing partners including:</i><ul style="list-style-type: none"><li>○ <i>Clean energy program implementers</i></li><li>○ <i>Utility Single Point of Contacts (SPOCs)</i></li><li>○ <i>IOU Tribal Liaison Representatives</i></li><li>○ <i>Groups serving priority populations (i.e., Central Valley, rural housing, Tribes, etc.)</i></li></ul></li></ul> |  |
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## Activities

No.	Activity	Channels/tools	Audience	Duration
1.1	Identify and conduct outreach to diverse property owner organizations and property management companies, especially in underrepresented regions and utility territories or that are newly eligible for SOMAH enrollment.	<ul style="list-style-type: none"> <li>● Salesforce</li> <li>● Direct outreach</li> <li>● Conferences/events</li> <li>● CBOs</li> <li>● LIHTC application data</li> <li>● Program referrals</li> <li>● Check Eligibility Form</li> <li>● Eligibility Prescreen Form</li> <li>● Mailers</li> </ul>	<ul style="list-style-type: none"> <li>● Property owners               <ul style="list-style-type: none"> <li>○ Housing authorities</li> <li>○ Tribal entities</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q4 2025</li> <li>● Monthly</li> </ul>
1.2	Continue to engage property owners and applicants with canceled/withdrawn applications to encourage application re-enrollment or identify other candidates for SOMAH in their portfolio.	<ul style="list-style-type: none"> <li>● PowerClerk</li> <li>● Direct outreach</li> <li>● Email (Marketo)</li> <li>● TA and Support Services Request Form</li> </ul>	<ul style="list-style-type: none"> <li>● Property owners               <ul style="list-style-type: none"> <li>○ Housing authorities</li> <li>○ Tribal entities</li> </ul> </li> <li>● Solar contractors</li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q4 2025</li> <li>● Quarterly</li> </ul>
1.3	Identify additional contact database sources containing affordable housing property data and scrub existing property data to better distinguish for-profit and nonprofit properties.	<p>Affordable housing agency data including but not limited to:</p> <ul style="list-style-type: none"> <li>● HCD</li> <li>● Local city and county records</li> <li>● Affordable housing association contact lists</li> <li>● Salesforce</li> <li>● Direct outreach</li> </ul>	<ul style="list-style-type: none"> <li>● Property owners               <ul style="list-style-type: none"> <li>○ Housing authorities</li> <li>○ Tribal entities</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q4 2025</li> <li>● Ongoing</li> </ul>
1.4	Develop narrative-based content from participating owners and projects to illustrate the benefits of SOMAH to prospective	<ul style="list-style-type: none"> <li>● CalSOMAH.org</li> <li>● Email (Marketo)</li> <li>● Targeted advertisements and media</li> </ul>	<ul style="list-style-type: none"> <li>● Property owners               <ul style="list-style-type: none"> <li>○ Housing authorities</li> <li>○ Tribal entities</li> </ul> </li> <li>● Affordable housing</li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q4 2025</li> <li>● Quarterly and for use at Q1 and Q3 PO conferences</li> </ul>

	applicants.	<ul style="list-style-type: none"> <li>● Case studies</li> <li>● Conferences</li> <li>● Social media</li> <li>● YouTube</li> <li>● LinkedIn</li> <li>● Facebook</li> <li>● Instagram</li> </ul>	associations	
1.5	Develop presentations and webinars to enhance property owner capacity within SOMAH, addressing knowledge and participation obstacles. This includes creating tools, materials, and resources such as solar overviews, solar monitoring guides, project implementation checklists, etc.	<ul style="list-style-type: none"> <li>● CalSOMAH.org</li> <li>● Email (Marketo)</li> <li>● TA and Support Services</li> <li>● Direct outreach</li> <li>● Conferences</li> <li>● Social media</li> <li>● Co-marketing partners</li> <li>● CBO events</li> </ul>	<ul style="list-style-type: none"> <li>● Property owners <ul style="list-style-type: none"> <li>○ Housing authorities</li> <li>○ Tribal entities</li> </ul> </li> <li>● Affordable housing associations</li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q3 2025</li> <li>● Quarterly</li> </ul>
1.6	Disseminate TA marketing and educational materials about use of TA services and increase Track A applications.	<ul style="list-style-type: none"> <li>● CalSOMAH.org</li> <li>● TA request form</li> <li>● Eligibility prescreen service</li> <li>● Email (Marketo)</li> <li>● Conferences</li> <li>● Direct outreach</li> <li>● CBO Events</li> <li>● Solar Preview Reports</li> </ul>	<ul style="list-style-type: none"> <li>● Property owners <ul style="list-style-type: none"> <li>○ Housing authorities</li> <li>○ Tribal entities</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q3 2025</li> <li>● Monthly</li> </ul>
1.7	Launch marketing campaigns via SOMAH's and partner's channels to target eligible Tribal properties	<ul style="list-style-type: none"> <li>● CalSOMAH.org</li> <li>● Email (Marketo)</li> <li>● TA and Support Services</li> <li>● Direct outreach</li> <li>● Conferences</li> <li>● Solar Preview Reports</li> <li>● PowerClerk</li> </ul>	<ul style="list-style-type: none"> <li>● Tribes and Tribal housing authorities</li> <li>● IOU Tribal Liaison teams</li> </ul>	<ul style="list-style-type: none"> <li>● Q2, Q3-Q4 2025</li> <li>● TBD</li> </ul>
1.8	Create marketing materials and	<ul style="list-style-type: none"> <li>● Direct outreach (email</li> </ul>	<ul style="list-style-type: none"> <li>● Tribal entities</li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q3 2025</li> </ul>

	launch paid media campaigns and/or sponsorships tailored to Tribal entities, including a Tribal email nurture campaign, Tribal flyers and digital ads	<ul style="list-style-type: none"> <li>and phone calls)</li> <li>● Email (Marketo)</li> <li>● Tribal digital publications</li> <li>● Affordable housing association sponsorships</li> </ul>	<ul style="list-style-type: none"> <li>● Tribal housing authorities</li> </ul>	<ul style="list-style-type: none"> <li>● Monthly</li> </ul>
1.9	Conduct thorough research on Tribal needs, communication strategies and the landscape of potentially eligible Tribal properties to improve outreach strategies and increase tribal enrollment.	<ul style="list-style-type: none"> <li>● LIHTC application data</li> <li>● Direct outreach</li> <li>● Calls</li> <li>● Salesforce</li> <li>● Native American Heritage Commission Native American Contact List</li> <li>● SOMAH Advisory Council</li> </ul>	<ul style="list-style-type: none"> <li>● Tribal entities</li> <li>● Affordable housing associations</li> <li>● IOU Tribal Liaison teams</li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q3 2025</li> <li>● As needed</li> </ul>
1.10	Broaden the SOMAH audience by adding new property owners to SOMAH email lists and conducting direct outreach to every new subscriber.	<ul style="list-style-type: none"> <li>● CalSOMAH.org</li> <li>● Email (Marketo)</li> <li>● Paid media campaigns</li> <li>● Conference email lists</li> <li>● RocketReach database</li> <li>● LIHTC application data</li> <li>● Salesforce</li> <li>● Webinars</li> </ul>	<ul style="list-style-type: none"> <li>● Property owners <ul style="list-style-type: none"> <li>○ Housing authorities</li> </ul> </li> <li>● Tribal entities</li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q4 2025</li> <li>● Monthly</li> </ul>
1.11	Launch targeted external marketing campaigns to get new applications for SOMAH.	<ul style="list-style-type: none"> <li>● Google Ads</li> <li>● Paid media</li> <li>● LinkedIn</li> <li>● Affordable housing association sponsorships</li> </ul>	<ul style="list-style-type: none"> <li>● Property owners <ul style="list-style-type: none"> <li>○ Housing authorities</li> <li>○ Tribal entities</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Q2 2025</li> <li>● Run TBD</li> </ul>
1.12	Continue to build upon the email nurture program to drive email subscribers to submit applications to SOMAH.	<ul style="list-style-type: none"> <li>● Email (Marketo)</li> </ul>	<ul style="list-style-type: none"> <li>● New and existing owner email subscribers</li> <li>● New and existing Tribal email subscribers</li> </ul>	<ul style="list-style-type: none"> <li>● When necessary</li> </ul>
1.13	Identify new co-marketing partners serving priority groups	<ul style="list-style-type: none"> <li>● SOMAH CBO partners</li> <li>● Affordable housing</li> </ul>	<ul style="list-style-type: none"> <li>● Property owners</li> <li>● Property management</li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q4 2025</li> <li>● Quarterly and at</li> </ul>

	(i.e., DACs, PacifiCorp and Liberty) to market the SOMAH Program to their audiences.	<ul style="list-style-type: none"> <li>partner channels</li> <li>● Webinars</li> <li>● Conferences and events</li> <li>● Clean energy programs</li> <li>● Co-marketing toolkit</li> <li>● CalSOMAH.org</li> <li>● Social media</li> <li>● Case studies, etc. from 1.4</li> </ul>	<ul style="list-style-type: none"> <li>companies</li> <li>● Government agencies</li> <li>● Clean energy program implementers</li> <li>● CBOs</li> </ul>	affordable housing conferences
1.14	Co-market with IOUs including Liberty and PacifiCorp to disseminate SOMAH materials including direct emails and mailers to their customers.	<ul style="list-style-type: none"> <li>● IOUs</li> <li>● Co-marketing toolkit</li> <li>● Case studies</li> </ul>	<ul style="list-style-type: none"> <li>● Property owners <ul style="list-style-type: none"> <li>○ Housing authorities</li> <li>○ Tribal entities</li> </ul> </li> <li>● Property owners not on SOMAH email list</li> </ul>	<ul style="list-style-type: none"> <li>● Q2, Q4 2025</li> <li>● Biannually, as offered by IOUs</li> </ul>
1.15	Integrate sponsorship opportunities only when this results in a direct marketing opportunity to have a booth and/or promotion at key industry events.	<ul style="list-style-type: none"> <li>● Statewide and/or regional conferences (Housing CA, SCANPH, CCRH)</li> <li>● Electrification Training Series</li> <li>● Clean energy events</li> </ul>	<ul style="list-style-type: none"> <li>● Property owners <ul style="list-style-type: none"> <li>○ Housing authorities</li> <li>○ Tribal entities</li> </ul> </li> <li>● Affordable housing associations</li> <li>● Clean energy partners</li> </ul>	<ul style="list-style-type: none"> <li>● Q1, Q3-Q4 2025</li> <li>● Quarterly, as available</li> </ul>
1.16	Research and promote available solar financing information and resources to interested property owners.	<ul style="list-style-type: none"> <li>● CalSOMAH.org</li> <li>● TA and Support Services</li> <li>● Email (Marketo)</li> <li>● Direct outreach</li> <li>● Webinars</li> <li>● Conferences</li> </ul>	<ul style="list-style-type: none"> <li>● Property owners <ul style="list-style-type: none"> <li>○ Housing authorities</li> <li>○ Tribal entities</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q4 2025</li> <li>● As requested</li> </ul>
1.17	Create a priority list of potentially eligible properties to conduct outreach to based on factors such as solar feasibility.	<ul style="list-style-type: none"> <li>● Eligible Properties Map</li> <li>● TA and Support Services</li> <li>● IOU data</li> </ul>	<ul style="list-style-type: none"> <li>● Property owners <ul style="list-style-type: none"> <li>○ Housing authorities</li> <li>○ Tribal entities</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q4</li> <li>● Ongoing, as offered by IOUs</li> </ul>

## Goal 2: Retain a robust and diverse contractor base and support eligible contractor participation with new application submissions

### Overview

The SOMAH PA recognizes the value that contractors bring to the program as contractors procure and lead the application process for **99%** of current applications (see [SOMAH Semiannual Progress Report 2024-07-31](#)). The SOMAH PA is committed to providing support to contractors to help them successfully navigate the program. The PA provides this support by ensuring contractors have sufficient knowledge about the program and its offerings, access to tools and resources to promote it and information about program eligibility, requirements, applications and online bidding. Solar contractors are motivated to grow their business and do so by building relationships with property owners. Leveraging government programs, such as SOMAH, helps contractors engage with interested property owners and drive lead generation. The SOMAH Program helps bring opportunities to solar installers by incentivizing solar installations across the five IOU territories. Technical assistance helps smaller contractors navigate the differences between single-home and multifamily installations, increasing solar companies' work portfolios. Therefore, Goal 2 strives to bring these opportunities to contractors across California.

### Subcontractors

SOMAH defines a subcontractor as a solar contractor company that is not the primary contractor (primary contractor is often the applicant). A subcontractor is a company that has been hired by the primary contractor to complete the solar installation for a SOMAH project. Primary research conducted by the SOMAH PA, in the form of one-on-one interviews and focus groups with SOMAH-eligible and ineligible contractors as well as input from Advisory Council members, has concluded that the PA can increase contractor participation through subcontractor opportunities. At the close of Q3 2024, 40% of all active and completed applications have utilized subcontractors to complete a portion of the project scope.

In 2024, the SOMAH PA continued promoting its subcontractor tool to help primary contractors locate subs near their SOMAH projects. In addition, the SOMAH PA continued to promote the resources available from SOMAH-eligible power purchase agreement (PPA)<sup>12</sup> providers. PPAs are particularly useful for contractors who traditionally offer host customer-owned systems but would like to connect with a PPA provider to expand their system ownership offerings by including third-party owned systems. The purpose of pairing these financial mechanisms is to reduce burdens and

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<sup>12</sup> Under a solar PPA, the property owner or the host customer pays per kilowatt-hour of energy produced monthly to the system owner.



limitations caused by host ownership options that smaller contractors have identified as barriers to participating in SOMAH.

### Potential Contractors<sup>13</sup>

In 2024, the SOMAH PA focused on engaging potentially eligible contractors in geographic areas where gaps in participating contractors existed. This outreach was primarily conducted through phone calls. These calls were aimed at targeting all potentially eligible contractors in the Liberty and PacifiCorp service territories as well as Tribal owned contractor companies across California. In addition, the PA sent SOMAH Contractor Training invitations to contractors and trade allies participating in the Energy Savings Assistance (ESA) Program to promote cross-program participation and inform energy efficiency contractors of other incentive opportunities that may be available for their projects. The PA plans to continue targeted contractor outreach in 2025.

### Challenges and Lessons Learned

Increasing new primary contractor participation remains challenging for the program. In 2024, the number of participating contractors remained much lower than the total number of SOMAH eligible contractors. Only **14** of the **183** eligible contractors have active or completed SOMAH projects.<sup>14</sup> A total of **30** new contractors became eligible for SOMAH in 2024. SOMAH considers the new signups a success because new contractors may have viable leads that other contractors are not aware of and can drive more applications. However, only one new eligible contractor submitted a new application in 2024. SOMAH had more success engaging with subcontractors. These subs have worked with **22** existing primary contractors and have driven the installation of **81 projects to date**. The PA views this as a noteworthy success given the feedback from interviews that many contractors prefer participating in SOMAH as a subcontractor rather than acting as a primary contractor due to capacity, experience, and other constraints. The PA is looking forward to increasing the number of participating contractors through one-on-one consultations, reengaging SOMAH-eligible contractors with program updates, Contractor Office Hours webinars, and improvements to the contractor nurture campaign.

SOMAH continues to streamline program information and update materials to make program requirements easier to understand, as noted in contractor feedback, including the [2023 Triennial SOMAH Evaluation Report](#).

The SOMAH PA continued running the email nurture campaign to new contractors subscribing to SOMAH Program emails to disseminate information and marketing

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<sup>13</sup> Potential contractors are solar contractors who have not participated in the required eligibility process or signed up for the SOMAH email sign-up and must be recruited to participate in the program.

<sup>14</sup> A nonparticipating SOMAH-eligible contractor has completed the eligibility process but has not submitted an application.



materials that contractors pinpointed as most important to them. The campaign sent a total of eight emails to all email listserv subscribers self-identified as contractors. In 2024, the campaign reached **364** contractors and generated **72%** open rate with no recipients unsubscribing.

Moving forward, each new contractor who subscribes to the listserv will receive nurture campaign emails to ensure they benefit from the same engagements and information. Website statistics show contractors typically do not engage with the program's resources, yet contractors reported a desire for more program resources in the 2023 Triennial SOMAH Evaluation Report and this is an attempt to fulfill the request.

### **Priorities and Key Strategies for Contractors**

- *Prioritize direct outreach to contractors who primarily work in DACs and application gap regions in order to increase application submissions in target communities.*

The majority of SOMAH applications continue to be for contractor-led (Track B) projects (see [2025 January SAPR](#)). The SOMAH PA expects an increase in applications by focusing on contractor outreach and engagement of new contractors. In 2024, direct outreach efforts led to new eligible contractors joining the program from the PacifiCorp and Liberty Utilities service territories. Historically, lack of available local contractors has caused a barrier to entry for projects in these territories, especially projects located in rural and mountain communities. SOMAH will continue to prioritize contractor outreach in these regions, as engaging with local contractors may drive new projects in these territories. SOMAH was not able to engage solar contractors on Tribal lands and will continue this effort in 2025. The D.24-11-006 has helped increase incentives for Northern California properties by removing the expected performance based buydown (EPBB) methodology for incentive calculations. This should help increase applications in the region. It is important to have contractors ready to connect with property owners now that incentive rates are greater.

- *Increase application submissions for current nonparticipating contractors*

The number of participating contractors and subcontractors versus nonparticipating contractors is low at **36** (**22** subcontractors and **14** primary contractors) out of **183** eligible contractors. In order to engage nonparticipating contractors, the SOMAH PA educates them on program requirements and how to use the SOMAH Eligible Properties Map for lead generation. Starting 2023, Contractor Office Hour webinars allowed the PA to engage with contractors and inform them of important program requirements. In Q2 2025, SOMAH will host an office hours session with the subject still to be determined. The PA is also planning to have general office hours where contractors can participate in live Q&As.

**SMARTIE Objective(s): All to be achieved by November 2025**

1. Continue outreach (direct emails and calls) to potentially eligible contractors across geographic gap regions, regions with limited SOMAH-eligible contractors, and where there are eligible properties: Liberty Utilities (6), PacifiCorp (10), Central Valley (approximately 21), and Tribal lands (research required).
2. Re-engage contractors through two refresher training sessions including Office Hour webinars.
3. Increase application submissions by at least four nonparticipating contractors.
4. Hold four Contractor Eligibility Trainings.
5. Match subcontractors to all the applications that would like a third-party contractor to assist with PV installations, subject to need by primary or subcontractor and upon request.



## 2025 Audiences and Main KPIs

### Audiences

- Diverse contractors (women-, minority- and/or LGBTQ+-owned businesses)
- Contractors with applications
- Potential contractors
- Nonparticipating contractors
- Subcontractors

### Main KPIs

- Number of new SOMAH-eligible contractors and subcontractors
- Number of new self-identified diverse SOMAH-eligible contractors (women-, minority- and/or LGBTQ+-owned businesses)
- # of applications per contractor
- Number of applications from diverse or small contractors that had no previous applications through 2024
- Number of contractor webinar registrants
- Number of direct emails opened or completed calls to eligible nonparticipating contractors in gap regions

## Activities

No.	Activity	Channels/tools	Audience	Duration
2.1	Develop and execute a plan for expanding contractor coverage into low coverage and priority geographic areas.	<ul style="list-style-type: none"> <li>Direct emails</li> <li>Direct calls</li> </ul>	<ul style="list-style-type: none"> <li>Potential contractors</li> <li>Nonparticipating contractors</li> </ul>	<ul style="list-style-type: none"> <li>Q1-Q4</li> <li>For Eligibility Trainings</li> </ul>
2.2	Improve email nurture campaigns for nonparticipating contractors by adding additional content, such as the progress payments pathway.	<ul style="list-style-type: none"> <li>Marketo</li> <li>CalSOMAH.org</li> </ul>	<ul style="list-style-type: none"> <li>Contractors in listserv</li> </ul>	<ul style="list-style-type: none"> <li>Q1-Q4</li> <li>As needed</li> </ul>
2.3	Update Eligibility Training as needed.	<ul style="list-style-type: none"> <li>Eligibility Training</li> </ul>	<ul style="list-style-type: none"> <li>Potential contractors</li> <li>Nonparticipating contractors</li> <li>Subcontractors</li> </ul>	<ul style="list-style-type: none"> <li>Q1-Q4</li> <li>Quarterly</li> <li>With program updates and evaluation recommendations</li> </ul>
2.4	Pair active contractors with subcontractors for installation and/or finance opportunities with PPA providers.	<ul style="list-style-type: none"> <li>Direct emails</li> <li>Direct calls</li> <li>Marketo</li> <li>CalSOMAH.org - subcontractor tool</li> </ul>	<ul style="list-style-type: none"> <li>Eligible nonparticipating subcontractors</li> <li>Subcontractors</li> <li>Contractors with applications</li> </ul>	<ul style="list-style-type: none"> <li>Q1-Q4</li> <li>As needed</li> </ul>
2.5	Collect and analyze contractor	<ul style="list-style-type: none"> <li>Primary contact information</li> </ul>	<ul style="list-style-type: none"> <li>Newly eligible contractors</li> </ul>	<ul style="list-style-type: none"> <li>Q1-Q4</li> </ul>

	demographic data.			<ul style="list-style-type: none"> <li>• After Eligibility Training</li> </ul>
2.6	Distribute marketing materials for contractors to use when engaging property owners according to feedback. Update as needed with feedback and program changes.	<ul style="list-style-type: none"> <li>• Marketing toolkit</li> <li>• CalSOMAH.org</li> </ul>	<ul style="list-style-type: none"> <li>• Contractors (all)</li> </ul>	<ul style="list-style-type: none"> <li>• Q1-Q4</li> </ul>
2.7	Hold Office Hour webinars with a special topic based on frequently asked questions and important program updates.	<ul style="list-style-type: none"> <li>• Webinars</li> </ul>	<ul style="list-style-type: none"> <li>• Nonparticipating contractors</li> </ul>	<ul style="list-style-type: none"> <li>• Q2 and Q3</li> <li>• As needed</li> </ul>
2.8	Promote SOMAH through external SOMAH channels.	<ul style="list-style-type: none"> <li>• CalSSA</li> <li>• Partner channels</li> <li>• SOMAH social media channels</li> <li>• Eligible contractors</li> </ul>	<ul style="list-style-type: none"> <li>• Potential contractors</li> </ul>	<ul style="list-style-type: none"> <li>• Q1-Q4</li> <li>• For contractor webinars</li> </ul>
2.9	Leverage narrative-based content (from Goal 1 Activities) to encourage participation from nonparticipating contractors.	<ul style="list-style-type: none"> <li>• CalSOMAH.org</li> <li>• Email (Marketo), see activity 2.2</li> </ul>	<ul style="list-style-type: none"> <li>• Nonparticipating contractors</li> <li>• Potential contractors</li> </ul>	<ul style="list-style-type: none"> <li>• Q1-Q4</li> <li>• Ongoing</li> </ul>

2.10	Market contractor engagement position for one-on-one consultations and meetings with property owners.	<ul style="list-style-type: none"> <li>● CalSOMAH.org</li> <li>● Email (Marketo)</li> <li>● Eligibility Training</li> <li>● Office Hour webinars</li> <li>● Newsletter</li> </ul>	<ul style="list-style-type: none"> <li>● Contractors (all)</li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q4</li> <li>● Ongoing, as requested</li> </ul>
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## Goal 3: Ensure sufficient job trainee participation and preparation for SOMAH job training opportunities and relevant careers

### Overview

The SOMAH PA continues to build the pipeline of eligible job trainees. In 2024, job training outreach efforts focused on the following:

- Informing [SOMAH-eligible job training organizations](#) (JTOs) about SOMAH's job training opportunities as a pathway for their students and graduates to get hands-on experience on multifamily solar photovoltaic installations.
- Encouraging job seekers and prospective job trainees to sign up for the SOMAH [Job Training Portal](#), where they can use the resume bank and job board to find open training opportunities and connect with SOMAH contractors.
- Educating job seekers and job trainees on career development resources and solar career opportunities.
- Supporting contractors' fulfillment of SOMAH's job training requirements by connecting them with job seekers and local JTOs, thus helping ensure SOMAH trainees are local and targeted hires.

The SOMAH PA regularly conducts outreach and engagement with prospective job trainees, JTOs, contractors, tenants and CBO partners through meetings, presentations and webinars to ensure goals are met and job training opportunities are successful. In 2024, the SOMAH PA's workforce development ME&O efforts focused on eight objectives with emphasis on the core program audiences (contractors, JTOs and job trainees). The status, challenges and lessons learned from these objectives are discussed below and were used in the development of 2025 program objectives.

### Contractor Job Training Support

The SOMAH PA directly supports contractors with job training requirements by helping them connect with eligible trainees and JTOs. In March and September 2024, the PA provided semiannual Job Training Overview webinars that presented a detailed overview of the job training requirements and shared helpful resources for facilitating meaningful job training experiences. The March Contractor Job Training Webinar featured a speaker from GCAP Services who shared information on AB 2143 (California's new Prevailing Wage Law) and how contractors can remain AB 2143 compliant. The webinar had **40** attendees.



## Job Training Organization Outreach

JTOs are trusted partners in connecting trainees with SOMAH projects. In 2024, the SOMAH PA's ME&O efforts focused on targeted outreach to JTOs local to SOMAH projects, JTOs serving targeted populations – particularly those in hard-to-reach regions – and JTOs serving Tribal communities. Further, the SOMAH PA worked toward ensuring areas with active projects engaged at least one JTO in the same county. In 2024, **91%** of projects met this goal. To ensure the success of future projects, in 2025, the SOMAH PA will continue to focus on outreach to JTOs in certain targeted regions (including Tribal communities and rural areas) while redirecting focus toward strengthening relationships with current JTO partners. As of November 15, 2024, the SOMAH PA has confirmed the eligibility of **95** job training organizations throughout California.

In 2024, the SOMAH PA continued offering its stipend program to assist trainees willing to travel to work on SOMAH projects by reimbursing the cost of travel and/or lodging. This stipend is only available to trainees and can be accessed through a direct request to the workforce development team or through a referral from a partner JTO. The PA intends for the stronger JTO partnerships and the stipend to help ensure all SOMAH projects meet the workforce development requirements even when there are no JTOs within the same county.

SOMAH's CBO partners and SOMAH's JTO Task Force also support JTO outreach. CBOs inform their local communities about SOMAH's job training opportunities and facilitate local JTO connections. The JTO Task Force advises the SOMAH PA on strategies to connect with JTOs, support job trainees in accessing solar careers and link with solar employers.

The SOMAH PA is also increasing tenant participation in job training opportunities by informing tenants of the opportunities via tenant education workshops ([see Goal 4 for more information](#)). An additional strategy to increase tenant participation in job training includes working with CBOs to include more information about workforce development opportunities in tenant outreach/education materials to spread awareness. As of November 15, 2024, **21** tenant trainees have participated in SOMAH Job Training opportunities. Through this approach, trainees will learn about SOMAH job training opportunities earlier in the process, increasing the time frame in which they can apply to participate in a project.

The JTO Task Force serves to ensure that the voices and interests of job training organizations remain at the forefront of the SOMAH Program's job training efforts. The SOMAH PA and the JTO Task Force have developed strategies that include outreach methods and pathways to reach targeted applicants and recommendations on how to reduce regional and service gaps. The SOMAH PA plans to sunset the formal JTO Task Force in 2025. Current members of the Task Force will be able to continue advising the program on workforce development and job training through participation in the





Advisory Council. The total membership will be capped at 15. Therefore, interested JTO Task Force members must apply to participate in this combined advisory body.

### **Job Trainee Support**

The SOMAH PA supports job trainees via webinars and workshops geared toward professional development. Additional support measures for trainees include providing education to contractors on the benefits of expanding their workforce by increasing awareness of and accessibility to career opportunities. These strategies offer the SOMAH PA multiple ways to encourage job trainees to update and upload their resume into the resume bank on the SOMAH Job Training Portal, increasing their exposure to SOMAH contractors and employers. The PA also provides support in crafting and enhancing resumes for trainees. While it is encouraged for trainees to upload resumes and certifications for a competitive edge, it is not mandatory. The 2024 objective to have **35%** of job trainees upload resumes to the Job Training Portal was not reached, as it was **26%** for the year. The SOMAH PA will continue to emphasize the importance of resumes during presentations to all audiences to increase this metric's performance in 2025.

The SOMAH job trainee program provides a diverse array of opportunities for potential trainees to gain valuable experience. While contractors primarily rely on SOMAH trainees for solar installation tasks, these trainees have also been involved in other parts of the program, including project management, post-installation support, operations and maintenance. Curated resources not only support a hands-on installation experience but also contribute to the professional growth of trainees, nurturing their expertise in the solar industry. This gives SOMAH job trainees the ability to apply confidently to solar installer roles but also other relevant career options, like project managers, site surveyors, permit runners and site inspectors.

In Q2 2024, the SOMAH PA worked with CBO partner Communities for a Better Environment to pilot a program in which four community members completed SOMAH's Heatspring Program [SOMAH Academy: Comprehensive Solar Study](#) and provided feedback on their experiences. The four graduates are targeted hires and now eligible for SOMAH job training opportunities. A Heatspring Program graduate noted, ***"the Heatspring Program was a good start, and hopefully we can get hands-on training to be better prepared for a solar career."*** The participants were adequately compensated for their participation.

## Challenges and Lessons Learned

The SOMAH PA's tactics are intended to secure hiring for local and targeted hires<sup>15</sup> and trainees living in DACs. The SOMAH PA encourages trainees and contractors to share their demographic information, however, some job trainees choose not to share their demographic information. As of November 15, 2024, **49%** of job trainees shared their demographic information with the SOMAH PA. From the job trainee pool that shared their demographic information, **38%** of job trainees were local hires and **98%** were targeted hires. The outlined objective was met, given that the target for 2024 was to have **80%** of trainees be local or targeted hires. **30%** of job trainees live in DACs, which did not meet the 2024 goal to have **40%** of job trainees living in DACs. Lastly, outreach to trainees in DACs is challenging because the SOMAH PA does not have information on how many of the trainees referred by JTOs and CBOs live in a DAC at the first point of contact. Generally, the PA has concentrated on outreach to targeted populations because there are JTOs with specific audiences, who the SOMAH PA can connect with (i.e., re-entry, English as a second language).

## Key Strategies for Job Trainees, JTOs and Contractors

- *Help to ensure job trainees have meaningful job training experiences*  
The SOMAH PA will continue to conduct job trainee surveys in 2025 to gather feedback on the job trainee experience, job placement and retention. Survey responses will allow the SOMAH PA to improve trainees' SOMAH job training experience.
- *Support contractors with local and targeted hiring of job trainees*  
The SOMAH PA will continue to provide personalized support to contractors to help them meet the job training requirements and recruit qualified job trainees, prioritizing local and targeted trainees. In its outreach, the SOMAH PA works with JTOs serving targeted populations and organizations located in SOMAH project areas. This also includes connecting contractors to local JTOs to foster direct hiring pipelines and employer-trainer relationships.
- *Celebrate job training successes through narrative-based content*  
A crucial aspect of increasing awareness of job training opportunities is sharing firsthand experiences of program participants. The SOMAH PA and its CBO partners have developed promotional materials (e.g., success stories, blogs, testimonials) using material from interviews of job trainees, JTOs and contractors about how SOMAH's job training opportunities have benefited them. These materials have been published on the SOMAH website. The SOMAH PA will continue to collect interviews and stories in 2025 to share them with prospective

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<sup>15</sup> SOMAH defines a local hire as an individual who lives within the same county as the SOMAH project and targeted hire includes DAC residents, affordable housing residents, women, people of color and other individuals who face barriers to employment, such as being homeless, being a custodial single parent, receiving public assistance, lacking a GED or high school diploma, participating in a vocational English as a second language program or having a criminal record or other involvement with the criminal justice system.

job trainees and JTOs to increase participation in the program.

- *Engage and prepare tenants for SOMAH job training opportunities and solar careers*

The SOMAH PA will maintain its focus on connecting tenants to local JTOs and to SOMAH contractors by focusing outreach in three methods. The first method is by working with CBOs to promote tenants as eligible trainees in their outreach (although due to change in PA support needs this may be to a lesser extent than in previous years). The second is by promoting tenants as eligible trainees through SOMAH's tenant education services and webinars. The third is through increased coordination between contractors and property owners for on-site job trainee recruitment. These efforts to promote tenants as trainees will continue in 2025 due to the increase in awareness resulting from the collaboration with the tenant education team, benefiting overall trainee recruitment. The workforce development and tenant education teams will also collaborate to further integrate workforce development information into tenant education materials and present job training opportunities early in the installation process.

### **SMARTIE Objective(s): All to be achieved by November 2025**

1. Strategically engage with a JTO in one or more of the four following priority areas per quarter: Northern California, Central Valley, Central Coast and Tribal communities.
2. Host at least two contractor-focused job training webinars to educate SOMAH contractors on job training requirements, jobsite safety, relevant labor policies and best practices.
3. Host two job trainee-focused webinars to educate and engage job seekers and job trainees on solar career pathways and high value soft skills in preparation for solar careers.
4. Ensure at least 30% of job trainees in the Job Training Portal have resumes on file.
5. Ensure at least 80% of hired SOMAH job trainees are local or targeted hires by doing targeted outreach to JTOs local to SOMAH projects and JTOs serving targeted populations.
6. Conduct targeted outreach to JTOs serving DACs.
7. Ensure 25% of job trainees complete the job trainee survey.



2025 Audiences and Main KPIs

<p><b>Audiences</b></p> <ul style="list-style-type: none"> <li>● Prospective job trainees, specifically:             <ul style="list-style-type: none"> <li>○ Tenants of SOMAH properties</li> <li>○ Local job trainees who reside in the same county as active SOMAH projects</li> <li>○ Targeted hires (those who have experienced barriers to employment)</li> <li>○ Tribal communities</li> </ul> </li> <li>● Eligible JTOs</li> <li>● Potentially Eligible JTOs</li> <li>● Communities in CBO partners' service regions</li> <li>● Contractors facilitating the job training requirements</li> </ul>	<p><b>Main KPIs</b></p> <ul style="list-style-type: none"> <li>● Number of SOMAH-eligible JTOs that serve tribal communities</li> <li>● Number of SOMAH-eligible JTOs in Northern California, Central Valley and Central Coast</li> <li>● Number of touch points with existing JTO partners</li> <li>● Number of job trainees signed up for the SOMAH Job Training Portal</li> <li>● Percent of job trainees with a resume uploaded in the resume bank on the SOMAH Job Training Portal</li> <li>● Number of job trainees hired full time</li> <li>● Percent of job trainees who are local or targeted hires</li> <li>● Percent of job trainees who reside in DACs</li> </ul>
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Activities

No.	Activity	Channels/tools	Audience	Duration
3.1	Conduct targeted outreach to: <ul style="list-style-type: none"> <li>● Current JTO partners.</li> <li>● JTOs that serve</li> </ul>	<ul style="list-style-type: none"> <li>● Direct phone calls/meetings</li> <li>● Direct emails</li> <li>● Job training overview presentations</li> </ul>	<ul style="list-style-type: none"> <li>● JTOs</li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q4</li> <li>● Ongoing</li> </ul>

	<p>tribal communities.</p> <ul style="list-style-type: none"> <li>• Electrical training programs.</li> <li>• JTOs that serve DACs.</li> <li>• JTOs that serve targeted populations to encourage their students/ trainees to join SOMAH's Job Training Portal and resume bank.</li> </ul>	<ul style="list-style-type: none"> <li>• Digital collateral</li> </ul>		
3.2	<p>Host at least four webinars for workforce development audiences.</p>	<ul style="list-style-type: none"> <li>• Webinars</li> </ul>	<ul style="list-style-type: none"> <li>• Job trainees</li> <li>• JTOs</li> <li>• Contractors</li> </ul>	<ul style="list-style-type: none"> <li>• Q1-Q4</li> <li>• Quarterly</li> </ul>
3.3	<p>Increase engagement on Job Training Portal and resume bank use.</p>	<ul style="list-style-type: none"> <li>• Direct emails to job trainees with limited engagement on the Job Training Portal</li> <li>• Social media</li> </ul>	<ul style="list-style-type: none"> <li>• Job trainees</li> <li>• Contractors</li> <li>• JTOs</li> </ul>	<ul style="list-style-type: none"> <li>• Q1-Q4</li> <li>• Quarterly</li> </ul>
3.4	<p>Share job training experiences via narrative-based content with relevant SOMAH audiences</p>	<ul style="list-style-type: none"> <li>• CalSOMAH.org</li> <li>• Social media</li> <li>• Webinars</li> </ul>	<ul style="list-style-type: none"> <li>• Job trainees</li> <li>• JTOs</li> <li>• Contractors</li> </ul>	<ul style="list-style-type: none"> <li>• Q1-Q4</li> <li>• Semiannually</li> </ul>

	to encourage job trainee participation and contractor hiring success.		<ul style="list-style-type: none"> <li>• CBOs</li> </ul>	
3.5	Survey job trainees who have participated in job training opportunities about their SOMAH training experience and career progression.	<ul style="list-style-type: none"> <li>• Survey</li> </ul>	<ul style="list-style-type: none"> <li>• Job trainees</li> </ul>	<ul style="list-style-type: none"> <li>• Q1-Q4</li> <li>• As projects are completed</li> </ul>

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

### Overview

The primary objective of tenant education is to ensure tenants living in potentially eligible SOMAH properties and tenants living in properties participating in SOMAH are aware of and able to benefit equitably from SOMAH. Tenant education (TE) goals are to ensure tenant safety, increase self-efficacy in maximizing the benefits of solar energy, reduce confusion and discomfort during installation and help center community voices. To achieve this, the SOMAH PA continues to work closely with the program's CBO partners<sup>16</sup> who support tenant education by conducting community and tenant outreach, facilitating TE workshops, developing and disseminating TE materials, assisting contractors and property owners with TE services, sharing SOMAH's workforce development opportunities and engaging local government entities around co-marketing opportunities with the SOMAH PA.

### Community-Based Organization Partnerships

The PA's CBO partnerships (eight) are key in achieving SOMAH's TE goals. These goals include creating culturally appropriate TE materials for the communities they serve, supporting TE services (e.g., facilitating TE workshops) and doing community outreach to residents in both participating SOMAH properties and potentially eligible SOMAH buildings. CBO partners also support the SOMAH PA in efforts to increase program participation via engagement of property owners and stakeholders. This outreach is done through participation in conferences, hosting events and one-on-one engagement. In 2024, CBOs organized and/or attended **55** outreach activities.

### Tenant Education

In 2024, the SOMAH PA and its CBO partners continued to provide free TE services. These services provide property owners and contractors direct support to complete their tenant education requirements and/or provide continued tenant education to residents at completed SOMAH projects. However, the prioritization of promoting TE services shifted in Q3 2024 as requests greatly outpaced previous years (the PA sought at least one PA led workshop per quarter) and the need for widespread promotion efforts was no longer a priority. The SOMAH PA coordinates with on-site property staff or the host customer to ensure materials are accessible to residents based on needs, including language, readability and format (PowerPoint, paper handouts, etc.). Per

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<sup>16</sup> SOMAH CBO partners are: [California Environmental Justice Alliance](#), [The Asian Pacific Environmental Network](#), [Communities for a Better Environment](#), [Community Environmental Council](#), [Environmental Health Coalition](#), [OC Goes Solar](#), [Self-Help Enterprises](#), [The Niles Foundation](#).

D.24-11-006 tenant education will no longer be a requirement for property owners or contractors. Regardless, the SOMAH PA will continue to maintain an array of up-to-date resources and will also continue to provide direct support and resources to tenants as well as property owners and contractors when requested. In recognition of current and in-progress work, this will not be in full effect until July 1, 2025 and will be further addressed in handbook updates forthcoming in 2025.

- *Tenant Education Workshops*

As of November 15, 2024, the SOMAH PA and CBO partners conducted **18** TE workshops in the following areas: El Cajon (CEJA co-led), Stockton (PA led), Loma Linda (CEJA co-led), Huntington Beach (PA led), Mission Viejo (PA led), Pomona (CEJA co-led), Richmond (APEN co-led), Oakland (PA led), Sanger (SHE led), and Ventura (CEC led). Workshops were adapted to meet the needs of residents, customizing elements like location, language, timing and resident profile. The SOMAH PA has begun revamping the TE materials based on findings from in-person workshops and plans to launch these materials in 2025. The SOMAH PA's plans to update tenant education requirements to incorporate pre- and post-installation TE materials and engagement in 2024 were originally delayed to 2025 to align with a revised handbook timeline. Based on the Commission's directive to remove the TE requirements from property owners and contractors, these changes will now provide recommendations instead of updated requirements. The ME&O efforts, supported or led by CBO partners, provide opportunities to achieve the PA's objectives to engage at least **50%** of tenants with more than one touch point and to support them in accessing the direct long-term financial benefits of the SOMAH Program. Touch points include newsletters, continued engagement, educational content/workshops, communications with property managers, virtual offerings (when applicable) and other opportunities.

## Challenges and Lessons Learned

The SOMAH PA focused on streamlining communication about SOMAH and its benefits to tenants, including incorporating workforce opportunities in tenant education to bring awareness of job trainee opportunities for tenants living at SOMAH projects. As a job trainee, tenants can receive paid job training experience. This pairing is intended to increase awareness of resident eligibility at a point in the project when participation is feasible.

In 2024, the SOMAH PA sought to have at least 10% of tenants living in buildings enrolled in SOMAH participate as job trainees, and as of November 15, 2024, residents represent **16%** of job trainees. The PA encountered tenants frustrated by interconnection delays. These delays pushed back the economic relief intended with the solar panel installations. While the PA is not in control of this aspect of the program, it is committed



to remaining transparent and communicating realistic expectations around interconnection to residents.

### **Priorities and Key Strategies for Tenant Engagement**

- *Continue providing TE services with needed adjustments*  
In 2025, SOMAH will continue providing its TE services, in particular tenant education workshops. However, the SOMAH PA is working on an updated plan for continuing to provide these services both in 2025 and long-term. As requests in 2024 were at an all-time high compared to previous years, the SOMAH PA must contend with budgets that will come down annually internally and for CBO partners who support this aspect of the PA's work. This strategy will consider factors such as capacity and budget constraints, service territories for CBO partners (expansion of these territories when agreed upon), projects in DACs, gap regions, accessibility concerns for residents, incorporating virtual options, and how these offerings are marketed since the current messaging includes TE services under the umbrella of no-cost TA and Support Services. Additionally, the SOMAH PA will continue engaging program participants around proposed changes so that if/when they occur, property owners and contractors feel prepared and well supported.

### **SMARTIE Objective(s): All to be achieved by November 2025**

1. Ensure contractors and property owners are aware of tenant education resources and availability of support services from the SOMAH PA and CBO partners through bi-annual Tenant Education Informational webinars, listserv announcements, public forums and emails.
2. Revise and disseminate SOMAH tenant education materials based on tenant feedback from surveys, focus groups and community-based partners, ensuring to include resources specifically for youth, people with disabilities, seniors and tenants with limited access to technology.
3. Facilitate one tenant education workshop per quarter.
4. Sustain tenant participation in job training opportunities to 10% of hired job trainees by collaborating with the SOMAH workforce development team to encourage local hiring by contractors through webinars.
5. Engage at least 50% of tenants with one touch point, to support them in accessing the direct long-term financial benefits of the SOMAH Program.



## 2025 Audiences and Main KPIs

<p><b>Audiences</b></p> <ul style="list-style-type: none"> <li>• Tenants in properties enrolled in SOMAH</li> <li>• Tenants interested in job training opportunities</li> <li>• Community-based organization partners</li> <li>• Contractors</li> <li>• Property owners and managers</li> <li>• Local and regional stakeholders</li> </ul>	<p><b>Main KPIs</b></p> <ul style="list-style-type: none"> <li>• Number of tenant education services workshops conducted by SOMAH PA team or CBO partners</li> <li>• Number of tenant education informational webinars conducted for contractors and property owners</li> <li>• Number of calls to the TE hotline and share of inquiries successfully fielded</li> <li>• Number and percent of tenants that participated in job training opportunities</li> <li>• Tenant education workshop attendance</li> <li>• Number of tenants indicating TE workshops effective (PA led in person)</li> <li>• Number of tenants indicating TE workshops effective (PA led virtually)</li> <li>• Number of CBOs participating in the SOMAH Program</li> <li>• Number of CBOs participating in Advisory Council</li> </ul>
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## Activities

No.	Activity	Channels/tools	Audience	Duration
4.1	Educate participating property owners and contractors about tenant education resources and support services from the SOMAH PA and CBO partners.	<ul style="list-style-type: none"> <li>• Workshops</li> <li>• Webinars</li> <li>• Flyers</li> <li>• Emails</li> <li>• CBO Resource Hub</li> </ul>	<ul style="list-style-type: none"> <li>• Property owners</li> <li>• Contractors</li> </ul>	<ul style="list-style-type: none"> <li>• Q1-Q4</li> <li>• Bi-annual</li> <li>• As requested</li> </ul>

4.2	Continue CBO and SOMAH PA facilitated tenant education services through remote/in-person tenant workshops <sup>17</sup> .	<ul style="list-style-type: none"> <li>● Workshops</li> <li>● Flyers</li> <li>● Emails</li> <li>● Pre-recorded videos</li> </ul>	<ul style="list-style-type: none"> <li>● Tenants in SOMAH properties</li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q4</li> <li>● As requested</li> </ul>
4.3	Work with CBOs to educate property owners on how to inform tenants about program benefits and job training opportunities.	<ul style="list-style-type: none"> <li>● Workshops</li> <li>● Newsletters</li> <li>● Email blasts</li> <li>● CBO Resource Hub</li> </ul>	<ul style="list-style-type: none"> <li>● Property owners</li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q4</li> <li>● Ongoing</li> </ul>
4.4	Identify barriers/challenges for tenants in participating in job trainee opportunities.	<ul style="list-style-type: none"> <li>● TE Workshop Feedback Evaluation</li> <li>● Interviews</li> </ul>	<ul style="list-style-type: none"> <li>● Tenants in SOMAH buildings</li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q4</li> <li>● Ongoing</li> </ul>
4.5	Revamp tenant education content on CalSOMAH.org aimed at tenants. Monitor trends and continually optimize the site and materials to facilitate a clear user path and determine content additions and enhancements.	<p>Print Materials</p> <ul style="list-style-type: none"> <li>● Simple Ways to Save Energy</li> <li>● What to Expect with SOMAH</li> <li>● How Will Your Bill Change?</li> <li>● Get Paid to Install Solar on Your Building</li> </ul>	<ul style="list-style-type: none"> <li>● Tenants in SOMAH buildings</li> <li>● CBOs</li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q3</li> <li>● As needed</li> </ul>

<sup>17</sup> The SOMAH PA has forecasted doing one TE workshop per quarter.

		<ul style="list-style-type: none"> <li>• How Solar Energy Works</li> <li>• Installation Timeline</li> </ul>		
4.6	Collect narrative-based content centered around tenants benefiting from SOMAH and share via targeted media and social media outlets.	<ul style="list-style-type: none"> <li>• Media</li> <li>• Social media</li> <li>• CalSOMAH.org</li> <li>• CBO Resource Hub</li> <li>• Case studies</li> <li>• Success stories</li> <li>• Testimonials</li> </ul>	<ul style="list-style-type: none"> <li>• General public</li> <li>• Stakeholders</li> <li>• Tenants</li> <li>• Property owners</li> </ul>	<ul style="list-style-type: none"> <li>• Q1-Q4</li> <li>• As needed</li> </ul>
4.7	Staff and optimize multilingual tenant hotline to answer questions with pre-recorded messages and live support.	<ul style="list-style-type: none"> <li>• Phone line</li> </ul>	<ul style="list-style-type: none"> <li>• Tenants in SOMAH buildings</li> </ul>	<ul style="list-style-type: none"> <li>• Q1-Q4</li> <li>• Ongoing</li> </ul>

## Goal 5: Ensure stakeholders are informed and actively co-marketing the program

### Overview

Connecting with SOMAH stakeholders across California is crucial to the program's success. SOMAH Program stakeholders include investor-owned utilities (IOUs), community choice aggregators (CCAs), regional energy networks (RENs), and government agencies at the city and county level. These stakeholders help increase awareness and recognition of the SOMAH Program, build trust within target communities, and identify opportunities for SOMAH to collaborate with and support relevant clean energy initiatives and energy efficiency programs.

As the program progresses toward its installation goal of 300 MW, stakeholder outreach will primarily focus on building and strengthening relationships with renewable energy partners. Historically, the most successful co-marketing efforts have been driven by these partners, who share sustainability goals and are actively working to inform their clients and communities about energy efficiency incentives and opportunities. Their deep knowledge of local communities and established networks have been instrumental in expanding SOMAH's outreach and engagement.

### Outreach Success

In 2024, SOMAH stakeholder outreach efforts led to successful partnerships. To continue to expand SOMAH's network and reach, the PA prioritized building and fostering new and existing partnerships with **17 co-marketing partners**. These collaborations not only extend SOMAH's promotional reach through partner channels but also facilitate seamless referrals of properties and property owners across various programs and partner organizations. Co-marketing efforts in 2024 included in-person presentations, co-leading webinars targeting property owners, developing cross-program referral processes, collaborating on direct outreach activities, and identifying key challenges and solutions to solar adoption.

The SOMAH PA has focused on collaborating with the Multifamily Energy Savings Program (MFES) to inform property owners and solar contractors about co-enrollment benefits. While this collaboration is ongoing, several significant successes have emerged, along with initiatives planned for 2025. Notably, the PA worked with the Northern MFES team to align their audit deliverable with SOMAH's Energy Efficiency Compliance Milestone Pathway 1 audit requirements to streamline participation in both SOMAH and MFES. This alignment is now effective in the Northern MFES territory and will be implemented in the Southern MFES territory in 2025. Additionally, the PA engaged with Energy Saving Assistance (ESA) program contractors, known as Trade Allies, to inform them about co-enrollment opportunities and invite them to SOMAH's Contractor Eligibility Training series. The PA plans to continue these efforts in 2025, with future initiatives aimed at strengthening connections between SOMAH contractors and ESA



Trade Allies, promoting co-enrollment in both programs and ultimately creating a more integrated approach to SOMAH's energy efficiency compliance requirements.

SOMAH's 2024 co-marketing partners include:

#### Q1

- City of Thousand Oaks
- City of Santa Ana
- Inland Empire Regional Energy Network and Western Riverside Council of Governments (IREN/WRCOG)

#### Q2

- City of Davis
- Association of Monterey Bay Area Governments
- Community Environmental Council

#### Q3

- City of Woodland
- Pala Band of Mission Indians
- Orange County Power Authority
- PacifiCorp Utilities
- Liberty Utilities
- Northern and Southern Multifamily Energy Savings Program (MFES)
- City of Irvine
- Southern California Edison
- Alliance of Californians for Community Empowerment (ACCE)

#### Q4

- City of Chula Vista
- PGE Single Point of Contact (SPOC)

Program partner event highlights include:

1. In-person presentation for property owners and contractors at the Community Environmental Council (CEC) in Santa Barbara.
2. Energy efficiency program layering webinar for contractors and property owners hosted by the PGE SPOC.
3. In-person presentation for the Southern California Tribal Chairmen's Association (SCTCA) monthly meeting.
4. In-person tabling for property owners at the annual City of Chula Vista Benchmarking Event.

In 2025, the SOMAH PA will continue to cultivate these partnerships and look for additional opportunities to co-market the program. Speaking opportunities at conferences where property owners are present will continue to be a key strategy for stakeholder outreach, building on the opportunities that the PA had to speak and present in 2024.

Ribbon-cutting ceremonies celebrating completed projects are also a tactic for partnering with stakeholders – allowing them to showcase their support for SOMAH as



they meet constituents. Both SOMAH-led and applicant-led ribbon cuttings have engaged valuable stakeholders from government officials to IOU staff. These stakeholders have included David Hochschild (California Energy Commission chair), Mia Bonta (assemblymember for District 18) and Carroll Fife (Oakland City Council Member for District 3). In 2025, the SOMAH PA will continue to leverage completed projects to build relationships with relevant stakeholders and to encourage those stakeholders to share successes of the completed projects via their own outreach channels. The SOMAH PA will also continue outreach to local government offices focused on sustainability, energy, and climate action planning in areas in which there are identified eligible properties.

Lastly, the SOMAH PA will guide the contracted CBOs in their outreach to officials within their communities.

CBO outreach efforts in 2024 included (as of Nov. 15, 2024):

- Orange County Goes Solar (OCGS)
  - City of Santa Ana meeting with subsequent PO and PMC in-person event April 4, 2024.
  - City of Irvine property with subsequent PO and PMC in-person event August 7, 2024.
- California Environmental Justice Alliance (CEJA)
  - San Diego Community Power (SDCP) + IREN/WRCOG with subsequent SOMAH program presentation with IREN's Leadership team April 16, 2024.
  - Association of Monterey Bay Area Governments meeting May 30, 2024.
- Community Environmental Council (CEC)
  - Multifamily Incentive Mixer, June 28, 2024.
- Communities for a Better Environment (CBE)
  - In-person tabling at U.S. Building Council conference, May 23, 2024.

## Challenges and Lessons Learned

Connecting with stakeholders can be challenging when reaching out to government offices. It's often difficult to identify the right point of contact, and persuading an interested stakeholder to co-market the SOMAH Program through their channels can be equally tough. These challenges stem from competing priorities, limited availability, and the multiple interactions needed to secure buy-in from decision-makers.

From experience, the PA has learned that cold emails to CCAs and government offices to start a partnership generally do not result in responses. For instance, in 2024 SOMAH contacted 10 government offices that resulted in four responses and two co-marketing opportunities. Instead, the successful connections with CCAs in 2024 came from

preexisting relationships with CBOs and PA members. Similarly, government office communications initiated by SOMAH are more often unanswered, which diminishes most chances for further coordination, such as an interest call.

Additionally, when an interest call is successfully scheduled, and there is synergy between SOMAH and the stakeholder, the distribution of a SOMAH promotional piece by the stakeholder is not always successful. There are often hierarchies in decision-making or strict messaging guidelines that can prevent stakeholders from co-marketing SOMAH. Since SOMAH has had more success with attendance at ribbon cuttings, direct outreach to government officials for in-person opportunities remains the most effective route to stimulate interest in promoting the program through interviews conducted by the SOMAH PA. This type of interview content is particularly helpful as it is used on marketing materials and the SOMAH website to increase program legitimacy and highlight real outcomes and impacts on communities.

### Priorities and Key Strategies for Audience

- *Seek out opportunities to reach many stakeholders at once*  
In 2025, the SOMAH PA plans to increase program awareness among local governments through guest presentations and co-hosted webinars. Participation in these activities with a wide audience allows the SOMAH PA to develop multiple leads and connections to government entities that can be explored further in one-on-one outreach, pending interest.
- *Provide stakeholders with additional support for potential action items when conducting outreach*  
The SOMAH PA will continue to develop materials to help stakeholder partners promote the SOMAH Program within their communities. For example, the SOMAH PA will provide outreach material options to government officials during initial engagement that can guide their promotion activities. This list will not limit ideas but will provide clear guidance to help connect direct outreach to specific and intentional actions.
- *Leverage the success of completed SOMAH projects*  
The SOMAH PA will use completed SOMAH projects as talking points to reach out to and connect with government offices across the state. Outreach will continue to be prioritized in the Central Valley, PacifiCorp and Liberty service territories and DACs. The SOMAH PA will leverage the success of completed SOMAH projects by creating case studies and success stories per recommendations from the 2023 Triennial SOMAH Evaluation Report.

### SMARTIE Objective(s): All to be achieved by November 2025

1. Conduct direct outreach to 10 government offices in areas where there are identified eligible properties to explore and secure co-marketing opportunities.





2. Work with new or existing energy efficiency industry partners to complete four co-branding or co-marketing efforts.
3. Work with investor-owned utilities (IOUs) to co-market SOMAH and attend ribbon-cutting events (all).

## 2025 Audiences and Main KPIs

Audiences	Main KPIs
<ul style="list-style-type: none"> <li>● Investor-owned utilities (IOUs)</li> <li>● Community choice aggregators (CCAs)</li> <li>● Regional energy networks (RENs)</li> <li>● Energy efficiency programs</li> <li>● Government offices</li> <li>● <i>Regional government associations such as San Diego Association of Governments (SANDAG) and Western Riverside Council of Governments (WRCOG)</i></li> </ul>	<ul style="list-style-type: none"> <li>● Number of new engaged stakeholders contacted/added to Salesforce database</li> <li>● Number of maintained partnerships (i.e., number of meetings with stakeholders with which the SOMAH PA has an existing partnership)</li> <li>● Number of government staff taking action in support of SOMAH (i.e., social media posting, testimonial, letter of support)</li> <li>● Number of co-marketing activities completed with multifamily energy efficiency programs</li> <li>● Number of co-marketing efforts completed with IOUs</li> <li>● Number of presentations given to intended audiences</li> <li>● Percent of co-marketing activities focused in DACs</li> <li>● Number of stakeholder websites promoting SOMAH</li> <li>● Number of SOMAH web references by partners</li> </ul>

## Activities

No.	Activity	Channels/tools	Audience	Duration
5.1	Provide content for and maintain information on the Stackable Programs page of the SOMAH website.	<ul style="list-style-type: none"> <li>● CalSOMAH.org</li> </ul>	<ul style="list-style-type: none"> <li>● RENs</li> <li>● Energy efficiency programs</li> <li>● Government</li> <li>● Property Owners and Managers</li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q4</li> <li>● As needed</li> </ul>

5.2	Present to stakeholders to foster program partnerships and facilitate program co-marketing.	<ul style="list-style-type: none"> <li>● Virtual meetings and webinars</li> <li>● In-person events</li> </ul>	<ul style="list-style-type: none"> <li>● Local governments</li> <li>● Regional government associations</li> <li>● Energy efficiency programs</li> <li>● CCAs</li> <li>● RENs</li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q4</li> <li>● Ongoing</li> </ul>
5.3	Provide regionally focused materials and content as requested by stakeholders to promote SOMAH within their communities.	<ul style="list-style-type: none"> <li>● Partner toolkit</li> </ul>	<ul style="list-style-type: none"> <li>● All stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q4</li> <li>● As needed</li> </ul>
5.4	Extend invitations to ribbon-cuttings to all relevant stakeholders.	<ul style="list-style-type: none"> <li>● Events</li> </ul>	<ul style="list-style-type: none"> <li>● Local governments</li> <li>● IOU staff</li> </ul>	<ul style="list-style-type: none"> <li>● Q1-Q4</li> <li>● As needed</li> </ul>

## Evaluation and reporting

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Since SOMAH's launch in July 2019, the SOMAH PA has collected data on program metrics and key performance indicators (KPIs) outlined in annual ME&O plans. Rather than providing individual KPIs by activity, a set of KPIs is established for each ME&O goal and its objectives to assess more directly the SOMAH PA's success in achieving each goal. For 2025, the SOMAH PA will continue to conduct existing evaluation tactics to track the success and impact of ME&O efforts. The SOMAH PA will evaluate 2025 ME&O efforts by:

1. Surveys and feedback of SOMAH's audiences.
2. Quarterly internal KPI reviews and tracking.
3. Semiannual Progress Report data and narrative reporting.
4. Ensuring key recommendations from SOMAH's Phase II Evaluation Report are being thoughtfully addressed through ME&O efforts.

Additionally, the SOMAH PA will continue to gather feedback through other program efforts such as webinars, public forums and TE workshops to improve upon ME&O approaches and the SOMAH Program overall. SOMAH's Advisory Council and CBO partners also continue to provide guidance and oversight of the program's implementation, which includes ME&O strategies.

### Surveys and Focus Groups

The SOMAH PA will continue to implement surveys and focus groups for property owners, tenants, contractors and job trainees as part of ongoing evaluation efforts to better understand their experiences accessing and participating in SOMAH. Results and findings from surveys and focus groups will continue to inform updates and modifications to ME&O strategies and tactics, mainly around communication and messaging as well as materials. These surveys and their methodologies account for different outreach needs and approaches to each intended audience. Surveys and focus groups for each major audience occur at various times throughout the year, and key findings from these will be shared via reporting processes like the Semiannual Progress Report.

### Quarterly KPIs

Over the course of 2025, the SOMAH PA will continue to review, update and finalize internal KPIs across ME&O objectives and program areas – seeing where there are information gaps and gaining better insights about the program's progress. On a quarterly basis, the SOMAH PA will review KPI outcomes from the previous quarter. This



review serves as an opportunity to shift or adjust ME&O efforts for the upcoming quarter(s) based on the efficacy demonstrated in the KPIs.

### **Semiannual Progress Report**

SOMAH is required to report on program progress and key metrics semiannually via the Semiannual Progress Report (SAPR) in January and July each year. This report is comprehensive and includes ME&O progress and milestones as well as application statistics, Technical Assistance and Support Services, DAC participation statistics and program planning and development updates. Through D.24-11-006, the Commission has directed the SOMAH PA to include additional goals, metrics and KPIs in the SAPR. Examples of these additions include points of interaction, listserv subscribers with crossover to SOMAH Applicants, expanded webinar stats and more.

### **Third Party Evaluation Report**

SOMAH's Phase II Evaluation Report implementation process was completed in June 2023. In 2024, the SOMAH PA integrated the findings and recommendations of that evaluation into ME&O strategies and tactics. This will continue in 2025, as the SOMAH PA prepares for the next triennial evaluation in 2026. The SOMAH PA also continues to regularly meet with the CPUC to identify opportunities to incorporate key recommendations into the program's ME&O efforts. These opportunities for updates have been implemented throughout this document in the overarching strategies, goals, activities and tactics for 2025 ME&O efforts. (See [cpuc.ca.gov/somah](https://cpuc.ca.gov/somah) "Evaluation Reports" section for final responses to recommendations).



## Appendix I: 2025 ME&O Plan Budget Forecast<sup>18</sup>

Category	Subtask	Total		
		Labor	Non-Labor	Category Total
Marketing and Outreach	ME&O Admin	\$448,592	\$0	\$448,592
Marketing and Outreach	Website Development & Enhancements	\$64,015	\$8,852	\$72,867
Marketing and Outreach	Community Based Organization	\$160,250 <sup>19</sup>	\$497,350	\$657,600
Marketing and Outreach	Cooperative Marketing Efforts	\$96,994	\$0	\$96,994
Marketing and Outreach	Conferences	\$18,937	\$11,400	\$30,337
Marketing and Outreach	Tenant Engagement	\$158,855	\$9,000	\$167,855
Marketing and Outreach	Property Owner Engagement	\$235,699	\$3,500	\$239,199
Marketing and Outreach	Contractor Engagement	\$61,517	\$0	\$61,517
Marketing and Outreach	Contractor Training	\$24,417	\$0	\$24,417
Marketing and Outreach	Marketing Collateral Development	\$128,402	\$2,487	\$130,889
Marketing and Outreach	Communications	\$71,194	\$1,300	\$72,494
Marketing and Outreach	Media	\$87,377	\$11,950	\$99,327
Marketing and Outreach	ME&O Plan Development	\$61,843	\$0	\$61,843
Workforce Development	Cooperative Marketing Efforts	\$25,100	\$0	\$25,100
	<b>Totals</b>	<b>\$1,643,192</b>	<b>\$545,839</b>	<b>\$2,189,031<sup>20</sup></b>

<sup>18</sup> In 2024 the ME&O plan's forecasted budget was \$2,533,171.

<sup>19</sup> This includes 1 FTE that manages CBO contracts, invoicing, and coordinates across approximately ~6 additional SOMAH PA staff who are working with CBO partners. Also includes labor costs for the additional SOMAH PA staff that are working and sharing scopes/activities with CBO partners.

<sup>20</sup> Per D.24-11-006, the SOMAH PA will allocate 1.5% of the 2025 ME&O forecasted budget towards expenditures for ME&O efforts in Liberty and PacifiCorp territories. Based on the 2025 ME&O Plan Budget Forecast above, that equates to \$32,820.