



Disadvantaged Communities - Single-Family Solar Homes Program

DAC-SASH 2024 Marketing, Education and Outreach Plan



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Introduction

About the 2024 DAC-SASH ME&O Plan

The Disadvantaged Communities Single-family Solar Homes (DAC-SASH) program's 2024 Marketing, Education and Outreach (ME&O) plan describes the activities the Program Administrator (PA), nonprofit GRID Alternatives (GRID), will undertake to ensure the success of the DAC-SASH program in the upcoming year, and provides a year-in-review of 2023, the program's fourth full year of operation. GRID's approach, based on the outcomes of its work so far in DAC-SASH, as well as its success administering the Single-family Affordable Solar Homes (SASH) program and many other local and state low-income solar programs, combines a recognized brand, data-driven targeting, community and institutional partnerships, and experience-based and flexible marketing and outreach activities.

About the DAC-SASH Program

DAC-SASH is structured to ensure that (a) low-income families in California DACs receive impartial, complete information from a trusted source and referrals to complementary programs and services; (b) that savings at the household level are maximized; and (c) that iron-clad consumer protection measures exist in all parts of program operation. All ME&O efforts as well as project installations are orchestrated centrally through GRID (the statewide administrator) and delivered through its California affiliate offices. Experience with income-qualifying single-family programs has shown that consistent advocacy and assistance throughout the entire outreach process--and the lifetime of the solar system--is key to ensuring that language, physical ability, age, digital access, and education level are not barriers to participation and that homeowners can make informed decisions. In communities often targeted by predatory practices, demonstrating investment in long-term household and community benefit is an essential component of the program.

The success of the DAC-SASH program so far has been predicated in part on GRID's ability to bring additional funding resources to projects, in addition to the program incentive. To date, GRID has covered the majority of the funding gap for solar through resources from its third-

party ownership model for roughly 80% of DAC-SASH projects,¹ philanthropic resources, local funding such as grants, or miscellaneous funding such as through the Transformative Climate Communities (TCC) programs which are available on a limited basis. GRID's fundraising must also cover some DAC-SASH administrative and ME&O costs, as the program's allocated budget does not cover all of GRID's actual costs to administer the program.

¹ ~20% of GRID's projects cannot leverage the TPO model because of system sizes being too small to meet the TPO provider's requirements, the equipment that may be donated does not meet the TPO provider's requirements, deed or land ownership documentation that does not meet the TPO provider's requirements, and/or the project funder, partner, city, or client is unable or unwilling to approve a TPO ownership structure.

Review of 2023 Objectives and KPIs

GRID identified seven core objectives in its ME&O plan for 2022². These were identified to achieve the program’s participation goals, and maximize the long-term impact for homeowners and households, job trainees and communities as a whole. These core objectives and KPIs may be updated as the program unfolds. In this section we provide an overview of the program’s 2023 ME&O objectives and activities, describe key takeaways and provide data on topline metrics or KPIs through November 1, 2023.

Objective 1 - Develop Accessible Outreach and Promotional Materials

Activities

- **1.1** Develop initial materials
- **1.2** Collect feedback on materials from partners and homeowners in DACs
- **1.3** Optimize and translate materials
- **1.4** Create large-print versions of materials

Summary

On December 15, 2022, the CPUC adopted D.22-12-056, establishing the Net Billing Tariff (NBT) as a successor tariff to NEM 2.0. Following the decision, in 2023 GRID updated its educational collateral to advise customers of new Net Billing Tariff (NBT) rules and best practices. That aside, primary marketing materials for the program were developed in 2019 and reviewed and approved by the Energy Division in late 2019. Since then, GRID has been disseminating these materials across the state to reach targeted homeowners. Based on our marketing survey results and input from Outreach staff, in 2023 we modified outreach materials to make them easier to read at a glance. This was particularly important for clearly separating the English and Spanish sections of key materials.

Objective 2 - Conduct Broad-Based Outreach to DACs Statewide to Meet a Statewide Installation Target of 892 Projects

Activities

- **2.1** Canvassing door-to-door in target communities

² GRID did not publish a 2023 ME&O plan.

- **2.2** Participation in community events
- **2.3** Send mailers to targeted lists
- **2.4** Facebook ads
- **2.5** Media advertising
- **2.6** Media outreach
- **2.7** Distribution of referral materials
- **2.8** Leverage city partnerships to promote the program
- **2.9** Leverage CBO partnerships to promote the program

Summary

- GRID’s outreach efforts for the program statewide have resulted in a relatively stable pipeline of eligible projects from targeted communities. While GRID has not reached its targeted 892 DAC-SASH projects for the year, we have installed 748 projects statewide through December 31, 2023 or over 84% of the target. The 2023 projected volume was more ambitious than in 2021 or 2022, with project count goals of 535 and 620 respectively in those years. A major challenge in 2023 was the transition from NEM 2 to NBT which caused many clients to be hesitant to move forward with a solar system due to the lower savings compared to NEM 2 . In 2023, staff attended over 50 community events and close to 250 leads were created at these events. In 2023, Outreach again did significant canvassing (which was ceased in pandemic years), in particular in the cities of Fresno and Ontario and in the North Coast region; from this canvassing there were over 400 leads created. Statewide we again encouraged direct word of mouth and participation in our referral program.

TABLE 1: 2023 COMPARISON OF PROJECTED TARGET VS. ACTUAL INSTALLATIONS

	2023 Projected Installations	Actual 2023 Installations	% of Installations Forecast
PG&E	422	406	96%
SCE	442	316	71%
SDG&E	28	26	93%
Total	892	752	84%

Highlights Of Outreach Marketing Efforts and Related KPIs in 2023

- GRID sends mailers to potential clients in DAC-SASH geographic areas to market the DAC-SASH program. In 2023, we had 626 responses that are directly attributable to these efforts. It is likely, however, that some recipients also received IOU or other marketing and their response may have been attributed to other campaigns. We select our audiences for mailers based on several criteria. A few examples include: regional offices may be doing canvassing and events in an area also; we mail to DACs in cities where we have an existing partnership; we mail to areas with additional funding, such as TCC.
- GRID updated outreach marketing materials in 2023 due to the switch to NBT and to create a stand-alone program income limit insert that can be replaced each year.
- Referrals through GRID's Referral Rewards Program (which pays \$200 per successful referral) continued to play a major role in successful outreach across the state, posting strong numbers with over 335 referrals with contracts signed in 2023.

Leveraging City Partnerships

Leveraging city partnerships is a key marketing and outreach strategy that we again increased in 2023. These efforts directly or indirectly created close to 1,000 leads or prescreens in 2023 to date. To fill in project funding gaps, GRID leverages additional funding from some local jurisdictions. In 2023 GRID continued to partner with multiple cities to promote the DAC-SASH program alongside the Transformative Climate Communities (TCC) program.³ In the Bay Area, GRID continued its successful partnership with the City of Richmond, and worked closely with the City of San Francisco and the City of San Pablo. GRID also partners closely with Stockton and Ontario. GRID employed a unique tactic in 2023 in the Cities of Ontario and Perris - a water bill insert was included about the program, which created over 50 leads in Ontario and 11 in Perris. In Ontario, GRID also sent a co-branded mailer to 1,900 residents and joined the city at multiple relevant events. This is just a sampling of the kind of very close collaboration GRID has instigated or been part of with municipalities across the state.

³ The Transformative Climate Communities (TCC) program was established by AB 2722 and is funded by the state's Cap and Trade program or the GGRF and its implementing agency is the Strategic Growth Council.

Leveraging CBO Partnerships

GRID also successfully leveraged CBO partnerships to drive interested leads to apply to the program. In 2023, 102 leads were pre-screened⁴ for the program that came from CBO partners, which is a bit lower than in previous years. GRID works closely with affordable housing developers such as Habitat for Humanity affiliates, Self-Help Enterprises, and Quality Conservation Services (QCS). In 2023 it also received leads from BAAQMD, SMUD, North Coast Energy Services, Tribal entities, Meet Each Need with Dignity (MEND), Casa de Esperanza, San Diego Housing Commission, and other small CBOs across 16 counties located in DAC-SASH area.

Utility Co-Marketing

Again in 2023, SCE and PG&E successfully partnered with GRID to send co-marketed emails to targeted, low-income DAC customers. Since 2022, the SCE email campaign has generated close to 2,000 leads and the PG&E email campaign has created close to 400 leads, which GRID considers to be successful. To date this type of co-marketing has not been setup with SDG&E, as it has not been deemed a good use of time and resources, based on how few eligible households exist in the territory. This tactic has expanded GRID's acquisition funnel and has proven to be a vital marketing tool, as it both supports client acquisition and raises awareness about the program. Each IOU also links to GRID's DAC-SASH web page on its solar web pages, driving less targeted traffic to the program but which can help get the word out about the program.

Objective 3: Outreach to tribal lands and SJV communities

Activities consisted of

- **3.1** Conduct outreach in communities with established GRID presence or partnerships
- **3.2** Establish brand presence and provide solar education in new communities through events and media outreach

⁴ Pre-screening is the process by which GRID reviews a client's general qualification criteria such as location, home type, homeownership, and self-reported income prior to having a fully completed application.

- **3.3** Develop outreach partnerships with cities and CBOs through direct outreach and education

Summary

In order to better focus capacity, cost and time where outreach staff can be more successful in enrolling households into the DAC-SASH program, several earlier target communities listed in prior ME&O plans were removed from this Objective. The priority communities listed below have been identified by GRID as areas in particular need of DAC-SASH program services. This is either due to electrification projects and/or large residential loads in tribal communities. The community categories are:

- San Joaquin Valley (SJV) communities that are part of a PUC proceeding focused on gas and electric access and affordability.
- Tribal lands as defined in D.20-12-003 and illustrated on the CES 4.0 DAC map.⁵

Where GRID has an established presence it qualified households, recruited job trainees and conducted installations. In 2023 there were over 280 leads created in these target communities.

San Joaquin Valley (SJV) Pilot Communities

Ten of the San Joaquin Valley cities are located in IOUs and CES DACs and are therefore eligible for DAC-SASH. Solar-suitable homes are limited in these communities and the rate of homeownership is low. Therefore in 2023 GRID again focused on areas where it identified solar-suitable homes previously. These cities were Le Grande, Fairmead, Ducor, La Vina and West Goshen. GRID also continued to coordinate in the first half of the year with the administrator of the SJV pilot programs, Richard Heath and Associates (RHA), to ensure community members receive information about the DAC-SASH program, in particular if they have a solar-suitable home and roof. No leads were received from RHA in this region in 2023 because the available clients were exhausted in previous years.

⁵ Temporary CES 4.0 map of DACs and tribal lands in California <https://oehha.maps.arcgis.com/apps/instant/minimalist/index.html?appid=b2a617f0e8984f3b96d8156bf968a36d>

Tribal Lands

In 2023 GRID installed 29 tribal projects in ten reservations across the state. The projects were installed outside of San Diego for the Campo Band of Mission Indians and Manzanita Band of the Kumeyaay Nation, near Bishop for the Bishop Paiute Tribe, for the Round Valley Indian Reservation in Mendocino County, and several others.

Objective 4: Provide streamlined communication, education, and long-term client support

Activities

- **4.1** Pre-qualify homeowners with bilingual intake team, with on-call translation service
- **4.2** Assign outreach staff to provide direct education and support to clients throughout application process
- **4.3** Educate clients on solar, energy efficiency and conservation, solar system maintenance and monitoring
- **4.4** Provide clients post-installation survey, assessing satisfaction with install process
- **4.5** Send clients annual survey assessing long-term program satisfaction

Summary

GRID outreach staff provided a fully supported process to program participants, from initial outreach through installation and system interconnection. This approach maximizes the program's impact for participants. In 2023, over 2092 leads were successfully prequalified for the program; this higher volume was achieved in part due to GRID hiring another Intake staff member to support lead processing. Leads are pre-qualified by regional outreach staff and by our centralized Intake Team. 54% of those that were prequalified went on to submit a complete application (1,144), which means they provided all requested eligibility documentation to GRID for review. Of the remaining pre-qualified leads, less than 160 are still active and may still submit an application. For pre-qualified leads that have been deactivated (38%), the most common reason for lead deactivation continues to be that a home is not solar suitable due to an old or unsafe roof. The second, third and fourth most common reasons for leads to be deactivated are code compliance or electric panel capacity issues, clients declining to participate, and clients being over the DAC-SASH income limit respectively. Leads are deactivated for construction related reasons during a construction site visit, which usually happens after the client has submitted a completed application.

Client surveys

GRID takes a quantitative and qualitative approach to the DAC-SASH program. To assess the program's impact qualitatively, we send surveys to clients after the system has been interconnected and on an annual basis thereafter. Of the 193 Post-Installation Surveys completed this year, the average client rating on its educational questions (scale of 1-5) was 3.4, exceeding our goal of 3. The average net promoter score (NPS) is 9.7 (scale of 1-10), exceeding our goal of 8. The NPS is the gold standard of customer experience metrics and measures all aspects of a client's experience going solar with GRID. The NPS rates a customer's likelihood to recommend services to somebody.

Over 230 DAC-SASH clients completed GRID's "Annual Survey" in 2023, sent on the anniversary date of the project's interconnection with the utility. GRID includes client responses, complaints, and feedback in its [semi-annual progress report](#) and is pleased with the high client satisfaction rates. The average NPS score for the annual survey is 9.0 and again there were complaints regarding the confusion that clients experience in receiving or understanding their Net Energy Metering (NEM) annual true-up bill from their utility provider. Although GRID educates clients about the monthly bill estimate and the annual true-up specific to solar at multiple points throughout the process, including during the application, contract signing, and post-install education, the true-up bill is still sometimes a shock to clients since it happens a year after the installation. For families struggling to make ends meet, an annual bill can create financial strain, even with the option to sign up for a payment plan. SCE provides a monthly NEM billing option that helps to alleviate the financial burden of annual NEM bills. NBT eliminates the large annual true-up bill through monthly billing, so this should not be an issue for clients that are on NBT starting in mid-April of 2023.

Objective 5: Provide information and educate participants about energy efficiency and complementary programs and services

Activities

- **5.1** Make accessible energy efficiency and conservation information on website and direct homeowners to that information via handouts and automated emails
- **5.2** Refer clients to IOU energy assistance programs

Summary

In 2023, GRID provided DAC-SASH clients with direct education and resources about energy efficiency, including educational [handouts](#), [at each outreach site visit and directs them to](#)

GRID's energy efficiency educational web page [with tips and programs](#). GRID conducted 1221 outreach site visits in 2023. In addition to the handouts, GRID's unique pageviews of our energy efficiency educational web page was just under 300.

GRID provided direct referrals to the Energy Savings Assistance (ESA) program. This program helps enrolled clients to maximize the impact of their participation in DAC-SASH by keeping their electric usage and monthly energy costs lower. GRID refers all clients that have an approved application to the ESA program. In 2023, over 1,100 DAC-SASH applicants were referred to the ESA program. We do not currently have visibility into how many were enrolled by the IOUs in 2023. GRID is open to exploring more mutually beneficial partnership opportunities with the IOUs in order to boost enrollment in this program and in DAC-SASH.

GRID also provides DAC-SASH applicants information about ESAP, the California Alternate Rates for Energy (CARE) program and the Family Electric Rate Assistance (FERA) program. The CARE program has strong uptake, with 80% of the 1,024 DAC-SASH applicants cross-enrolled in the CARE or FERA program. Of the 20% that were not yet enrolled, PG&E proactively enrolled 100 participants in one of the discount programs - this took place thanks to a newer collaboration with GRID. In 2023, GRID has added reminders to its post-install and annual survey to remind clients to re-enroll in CARE/FERA in order to continue benefiting from the programs. The CARE program gives IOU customers a 30% discount on their electric bill and a 20% discount on their natural gas bill.

Disadvantaged communities benefit from a holistic and streamlined outreach approach. In 2023 GRID connected DAC-SASH participants to complementary programs that can further benefit them. More examples of such services or programs include:

- Battery storage projects were provided at no or low-cost to some DAC-SASH participants in 2023, several of which were funded by the [Self Generation Incentive Program](#) (SGIP)'s Equity Resiliency Budget. The SGIP Equity Resiliency Budget received new funding which allowed these projects to move forward. GRID aims to provide storage opportunities to more DAC-SASH clients in the future, especially if they are eligible for SGIP. A hurdle to offering more storage systems to DAC-SASH clients is that the eligibility map for the Equity Resilience Budget has virtually no overlap with the EnviroScreen DAC map. There is some overlap between the DAC-SASH and SGIP maps are some Tribal territories, which GRID leveraged to expanded outreach to Tribes regarding battery storage systems. Our North Coast, San Diego and Inland

Empire offices in particular have expanded their work with Tribes to install battery storage systems on previous DAC-SASH clients.

- In 2023, GRID continued to refer DAC-SASH participants to [Clean Mobility programs](#) for electric vehicles (EV) or EV chargers. Clients typically received between \$5,000 and \$9,500 towards a plug-in car. Most programs include a \$2,000 add-on for residential, level-2 charging.

Objective 6 - Recruit Job Training Participants, Focused On Job Training Organizations And Job Trainees In DACs

Activities and KPIs

- **6.1** Recruit individual trainees from DACs through client outreach channels
- **6.2** Engage existing JTO partners in/serving DACs to provide job training to students
- **6.3** Identify new JTO partners in new communities through direct outreach and education
- **6.4** Maintain and promote resume bank and job board to job trainees as a way to access paid work opportunities
- **6.5** Provide SPP contractors with access to resume bank and job board to facilitate hiring trainees from DACs
- **6.6** Engage employers to hire trainees through GRID's resume bank, job board and employer newsletter
- **6.7** Invite trainees from JTOs located in DACs to participate in free job fairs held by GRID and its partners

Summary

In 2023, GRID leveraged its community networks and job training organization (JTO) partnerships to engage 135 residents of DACs in projects and trainings. GRID continued to return job trainees to real-world install sites, host job fairs, and make direct connections between trainees and GRID's employer network. Through its virtual and in-person Installation Basics Training (IBT) trainings, GRID engaged over 300 trainees to provide hands-on training to become an entry level solar installer. Each GRID office continued to adapt its job training programming in a way that best suits their unique situation with respect to partner relationships and staff capacity. GRID's workforce development programming has become more sophisticated in recent years, in particular the [IBT 200 program](#).

Trainee Participation

In 2023 135 job trainees from DACs signed up to participate in a DAC-SASH project, logging over 1,200 hours of participation on DAC-SASH projects getting hands-on installation experience.

Job Training Organizations

GRID has active relationships with 36 job training organizations and CBOs in California, 17 of which are located in DACs. Since the program began, GRID has partnered directly with over 140 JTOs of which 40 are located in a DAC.

Employers

As GRID's workforce development programs continue to grow and expand to new geographic regions, there is an opportunity for GRID to partner with more employers at a local and national level. With the increasing availability of online job boards, in 2023 GRID decided to shift priorities away from its internal Resume Bank and Job Board.

Jobseekers

In 2023, 96 DAC-SASH job trainees or volunteer participants have self-reported through our surveys that experience working on a DAC-SASH project helped them secured longer-term paid employment.

Objective 7 - Keep Stakeholders Informed About Program Impact

Activities

- **7.1** Solicit input from stakeholders through direct inquiry and evaluation webinars
- **7.2** Maintain a page on GRID website describing program and linking to reports and data
- **7.3** Media/storytelling specific to DAC-SASH

Summary

Key stakeholders for the DAC-SASH program include the CPUC Energy Division, the Disadvantaged Communities Advisory Group (DAC-AG), California IOUs, Job Training Organizations (JTOs), Community-Based Organizations (CBOs), utility ratepayers, and residents of DACs across the state.

In August 2023, GRID submitted a detailed response to the third-party evaluator's recommendations. This was after much legwork throughout 2023 with the Energy Division and third-party evaluator Evergreen Economics, to provide clarity and insight into how the program currently functions.

GRID also kept interested parties informed on the program's progress and challenges with its twice per year progress reports, attendance at DAC-AG meetings, reporting on California Distributed Generation Statistics' website, and timely responses to any external inquiries. GRID publishes the program's semi-annual progress reports in January and July, which are posted to GRID's [website](#) as well as to the Energy Division's program web page.

Through Q3 2023 the [DAC-SASH program web page](#) on GRID's website received almost 3,600 pageviews demonstrating strong interest in the program. Program-specific storytelling in 2023 consisted of many regional social media posts and the DAC-SASH program was mentioned more broadly in several external mediums in 2023 as well.

Key Program Audiences

Low-Income Homeowners Located in DACs

The primary audience for the program is low-income homeowners living in disadvantaged communities (DACs). To qualify for DAC-SASH, homeowners must live in one of the top 25 percent most disadvantaged communities statewide using the CalEnviroScreen, be a billing customer of one of the state's three large IOUs and meet income qualifications as denoted by the income guidelines of either the California Alternate Rates for Energy (CARE) program or the Family Electric Rate Assistance (FERA) program. The target communities for the program are diverse, with most common languages including Spanish, English, Mandarin, Cantonese, Korean, Vietnamese, and Tagalog. This program audience needs simple, clear and compelling information about the program in languages they understand and from messengers and channels they trust, as well as ongoing education and support.

There are multiple, additive barriers to reaching this diverse audience that GRID's ME&O efforts address, including lack of trust, lack of exposure to solar technology, distrust of solar companies, limited time to commit to learn about solar and the benefits of the program, and the complexity of net metering and billing. In addition, the cultural diversity of this audience calls for targeted and customized ME&O, which can be challenging with limited resources and budget.

There are also structural barriers outside the scope of ME&O, such as roof condition, unpermitted structures and the need for electrical upgrades that can limit the pool of eligible homeowners, especially in communities with older housing stock. As outlined in Objective 4 above, the drop-out rate for lack of solar suitability across the state is roughly 30% – with much higher drop-out rates in urban areas with older housing stock. It has become clear that disadvantaged communities have more structural barriers than non-DAC areas, because homeowners in these areas may be unable to maintain their homes.

Tribal Communities

GRID has a history of working with tribal communities across California to promote the SASH program and is now able to use that experience to promote the DAC-SASH program to eligible tribal land communities. Along with the highest-needs communities identified by the

Commission as a priority for the program, tribal communities are also high-need communities and experience high rates of disconnections.

Job Trainees

GRID recruits job trainees from both the general public and through job training partners, including local job training organizations and community colleges. Barriers to participation may include language, technological barriers to accessing information about training opportunities, lack of financial resources to engage in unpaid training, lack of transportation to and from job sites, and distrust. This audience benefits from clear and compelling information on the opportunity and resources available to them from a channel they trust and needs support to address barriers to ongoing participation.

Other Key Stakeholders

DAC-SASH stakeholders include the CPUC Energy Division, California's Investor-Owned Utilities (IOUs), Job Training Organizations (JTOs) located in DACs, key partner Habitat for Humanity, several Community-Based Organizations (CBOs) around the state, several DAC-located Community Choice Aggregators (CCAs), and residents of DACs across the state. These stakeholders continue to seek access to data, information about program progress and impact, and mechanisms to provide input and feedback, especially as the clean energy equity space evolves and expands in recent years.

Strategic Approach

In 2024 GRID will continue to update its ME&O efforts to more effectively use the available incentive budget. GRID also aims to have its Central Valley outreach staff focus on finding more eligible SCE households; if successful this will spend down the program's SCE incentives budget and help to preserve more of its PG&E incentive budget for cities that are located further north. To this end, future program invoices may include more billing by GRID's CV, Inland Empire or North Valley regional staff and perhaps less billing in high cost of living regions where it remains very challenging to find eligible program participants at such low-income limits.

Holistic Approach with Focus on Maintaining Trust

GRID's holistic customer-centric approach addresses ME&O barriers using strategies that have proven to be successful working with low-income households. With its affiliate offices across the state, GRID combines direct, in-community, in-language outreach and education with community and local government partnerships to ensure program information is reaching eligible households through a trusted source. Building trust is critical in communities that may view these programs as "scams" or as "too good to be true."⁶ Educational messages are reinforced by a robust referrals option and accessible digital resources and platforms.

Once a client has been approved for participation, they receive dedicated support from outreach and construction staff from application to installation and interconnection, as well as referrals to complementary state and local programs, including the Energy Savings Assistance Program (ESAP), CARE or FERA, and local clean mobility programs. Following installation, GRID and its Third-Party Ownership (TPO) partners provide ongoing education and engagement, solar production online monitoring, and access to phone support and troubleshooting throughout the expected life of the solar electric system.

Focus on Referrals, Word-of-Mouth and Partner-Based Marketing

⁶ Market and Program Administrator Assessment (PY 2011-2013), p.53

In 2024 GRID will continue to focus on referrals and word-of-mouth as a highly effective marketing tool, coupling its on-the-ground presence with partnership-based marketing with organizations such as Habitat for Humanity, CBOs, and large and small cities. GRID continues to find that partnering with a trusted community organization helps address challenges with client trust. Not only does working with trusted CBOs, community leaders, local agencies and other service providers help overcome trust and education barriers, it helps to address structural barriers by layering ancillary services like electrical upgrades and roof repairs. This collaborative, partner-based approach has proven successful in addressing barriers to participation in DACs.

Financial Tools for Gap Funding in DACs

GRID's nonprofit status enables it to address barriers to solar outside the scope of ME&O, such as our ability to eliminate financial costs and credit score barriers for participants. We do so in many cases by supplementing the program's incentive funding with private or philanthropic dollars or complementary public funding streams. This increases the applicant pool and ensures that clients at the lowest income can participate in the DAC-SASH program. Offering no-cost systems by covering the funding gap allows clients to participate that would otherwise not be able to afford the difference between the project cost and the incentive. GRID will continue to make this a major focus in the future. New in 2024, GRID will continue to explore an Elective Pay option where GRID would own some DAC-SASH systems. This may launch in 2024 and GRID will keep Energy Division and other stakeholders informed and engaged as this effort progresses.

Alignment with Statewide ME&O Efforts

The State and Commission have made investments to ensure that the ME&O efforts of multiple programs related to energy efficiency and energy education for California ratepayers are coordinated, and thereby have the maximum impact on driving behavioral changes. Decision 16-03-029 envisions a statewide ME&O effort that drives participation into local/regional programs and Decision 16-09-020 provides direction for the Energy Upgrade California brand and a 5-year ME&O Strategic Roadmap highlighting program coordination. To this end, GRID will continue working with California IOUs to ensure that DAC-SASH is integrated and aligned with statewide ME&O efforts.

This alignment effort is particularly relevant to client education about time-of-use (TOU) rates and to enrollment in complementary programs such as ESAP CARE, and FERA. Because Net Energy Metering (NEM) and NBT rules require DAC-SASH clients to move to a TOU rate, GRID provides more education about TOU and leverages utility informational materials on TOU where available. Low-income clients are often more challenged than other customers in moving to a TOU rate, because they lack the flexibility or knowledge required to modify their electric consumption patterns in response to peak or high-cost times of day.

Installation Targets in 2024 and Continued Challenges

In 2024 GRID estimates higher project volume compared to 2023, due to more capacity for the DAC-SASH program in part due to a focus on its subcontractor model, a slight staffing increase and due to fewer competing priorities. The 2024 SDG&E installation target (41 projects total) continues to be low due to the ongoing and extreme difficulty finding eligible homeowners in that utility territory.

Installation Targets in 2024 and Beyond

Table 2 details the incentives spent and installed projects through December 31st, 2023, as well as the estimated project count by IOU and estimated capacity for the remainder of program life through 2031. This is based on the DAC-SASH program budget and GRID’s experience in marketing, outreaching, and installing in DACs statewide.

TABLE 2: INCENTIVE FUNDING AND INSTALLATION TOTALS

	Incentives Claimed	Installed Projects	Installed Capacity ⁷	Total Incentive Funding	Incentives Remaining	Remaining Est. Capacity ⁸
	2019 - 2023			2019 - 2030	2019 - 2023	
PG&E	\$17,166,501	1466	5.72	\$44,574,000	\$27,407,499	9.14
SCE	\$10,906,107	928	3.64	\$46,920,000	\$36,013,893	12.00
SDG&E	\$913,470	84	0.30	\$10,506,000	\$9,592,530	3.20
Total	\$28,986,078	2,478	9.66	\$102,000,000	\$73,013,922	24.34

⁷ In megawatts (MW) CEC-AC

⁸In megawatts (MW) CEC-AC. The remaining capacity is estimated by dividing the remaining incentive amounts by the \$3/W incentive rate

Table 3 below illustrates GRID’s expected installations in 2024. The expected installations are determined by survey each office for their capacity and projections of potential clients. There is again a very low project count projected in SDG&E, which will utilize a small percentage of the annual incentive funding in that utility territory. This is due to the very limited number of eligible households in SDG&E territory and due to the many resources and energy needed to identify eligible homes in the service territory, as further detailed in the “Continued Eligibility Limitations in SDG&E territory” section.

TABLE 3: 2024 INSTALLATION TARGETS FOR DAC-SASH

	Estimated Incentives	Average System size kW, CEC-AC ⁹	Estimated # of Installations
PG&E	\$5,707,080	3.82	498
SCE	\$5,838,300	3.90	499
SDG&E	\$473,550	3.85	41
Total	\$12,018,930		1,038

Geographic Scope in 2024

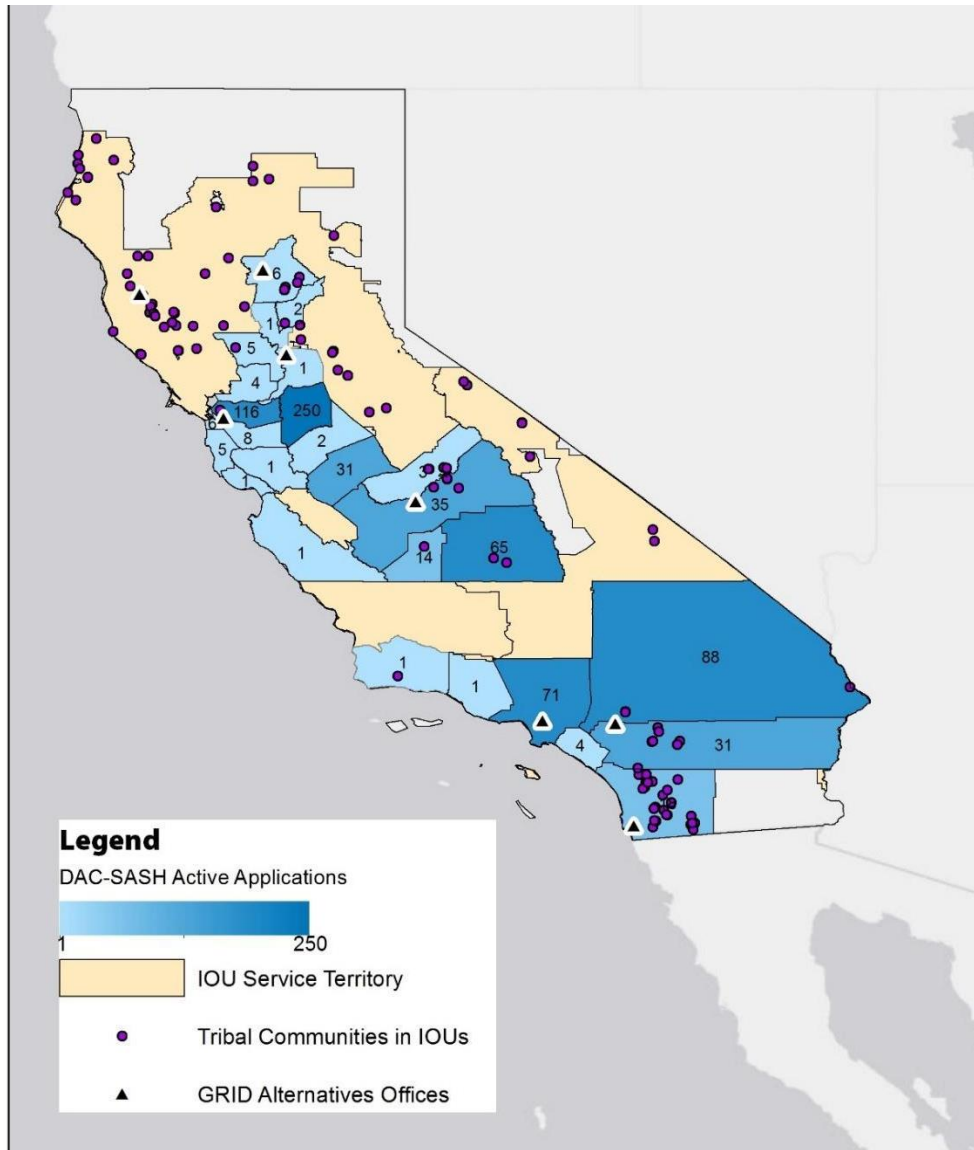
Map 1 below shows the location of GRID’s regional offices, IOU territories, and DAC-SASH active applications by county in 2023. Five of GRID’s six regional offices and two satellite offices are located in a CalEnviroScreen (CES) DAC, an established on-the-ground presence that facilitates program uptake. In 2023, GRID has received and approved over 1,130 applications from eligible DAC-SASH households, with the majority of approved DAC-SASH applications located in PG&E and SCE service territories. GRID will continue to expand its

⁹Average system size is calculated based on GRID’s single-family installations in each IOU service territory.

focus to tribal lands and communities, in line with Decision 20-12-003. It plans to install 40-50 tribal DAC-SASH projects in 2024, as it leans into tribal partnerships around the state. To date, 28 tribal projects have been completed in 2023.

In the third-party evaluation, the evaluators do an analysis of eligible households and suggest focusing efforts in areas with higher rates of eligibility. However, the evaluation acknowledges that the analysis is based on a model that does not take into account construction barriers and states that the true number of eligible, solar-ready homes is smaller than what their model shows. For example, the analysis estimates that the Greater Los Angeles region has the highest number of eligible clients. From our experience, Greater Los Angeles has the highest rates of construction barriers. Due to this experience, GRID's regional offices develop neighborhood by neighborhood information about housing stock. They adjust as needed to work in areas where the likelihood is higher that clients they develop relationships with will be eligible. We also develop strong partnerships with cities, such as the city of Stockton in North Valley, San Francisco and Richmond in Bay Area, Pacoima and neighborhoods in Greater Los Angeles, Ontario in IE. These partnerships provide fruitful avenues for marketing as well as additional funding to overcome construction barriers in some cases. We believe this more targeted approach is more relevant and successful than the broader approach based on an analysis of potentially eligible households.

MAP 1: DAC-SASH ACTIVE APPLICATIONS BY COUNTY, IOU TERRITORIES, AND TRIBAL COMMUNITIES



Ongoing Eligibility Limitations in SDG&E Territory

In 2023 the program’s eligibility barriers in the San Diego region were again stark. The geographic limitation of CalEnviroScreen DACs and the income eligibility limits make it so that GRID’s outreach and marketing efforts have been unsuccessful in acquiring more than

just a few qualified applicants in any given month. As of December 22, 2023, in SDG&E there were:

- 82 DAC-SASH projects installed to date in 2023 (program year 5) and only \$783,912 in incentives claimed.
- In-progress: 8 projects had reserved incentives that were awaiting installation and 3 applications were under review.

In SDG&E, only 37 census tracts are in the DACs compared to over 350 in PG&E and over 650 in SCE. The census tracts in SDG&E that meet the CES qualification represent less than 5% of SDG&E territory. In those 37 census tracts the rate of homeownership is lower than in other census tracts, further limiting market potential. Based on available data, GRID estimates that there are fewer than 3,000 low-income homes in SDG&E that meet the geographic eligibility for DAC-SASH and GRID expects that at least 50% of these homes will not be eligible because they are not owner-occupied or are not solar-suitable due to shading, roof condition or code issues. GRID's third-party evaluators, under a different methodology, similarly found that fewer than 4,000 homes in the SDG&E territory were nominally eligible, and flagged that the real number of eligible homes is likely lower due to homes occupied by renters or unsuitable for solar due to site conditions (such as homes needing new roofs before going solar, or electrical upgrades).

In addition, the statewide income limits further restrict participation in San Diego, where the cost-of-living is higher. Other areas of the state such as the Bay Area and Greater Los Angeles are also experiencing a high rate of disqualification because of the program's CARE/FERA income benchmark. GRID has determined that there are not sufficient homeowners who meet the definition of low-income and own solar-suitable homes who reside in a CES DAC to use the allotted incentive funds in SDG&E territory.¹⁰ The third-party evaluator also found this to be true, starting on page 104 of its 2023 report, "Related to customer location, the data show that eligible distribution does not align with the funding distribution across

¹⁰ To see maps that GRID created to highlight these program limitations in the San Diego region, see the DAC-SASH PFM that was submitted in April 2020 to the CPUC.

IOUs.”¹¹ It found that roughly 3% of current projects are in SDG&E’s service territory, and 2% of the estimated eligible population is located in SDG&E (page 5 of Evaluator report¹²).

¹¹ www.cpuc.ca.gov/-/media/cpuc-website/divisions/energy-division/documents/solar-in-disadvantaged-communities/dac-sash-evaluation-report-final.pdf

¹² [Process and Load Impact Evaluation of DAC-SASH Program](#). April 28, 2023. Evergreen Economics

Program Objectives in 2024

GRID's 2024 ME&O goals are to continue to build a more robust applicant pipeline with projects and clients representing the diversity of California's population, and to ensure a positive client experience that continues to build trust in the program. GRID will mix remote outreach approaches with in-person events and other tried and true tactics such as family or friends' referrals. The program will seek to expand more in 2024 than in previous years (especially in SCE territory), in part due to efficiencies from the program's new electronic application and due to a slightly larger Outreach staff compared to previous years.

The program's 2024 ME&O Objectives are:

1. Continue to assess outreach & promotional materials, given the NBT setting
2. Conduct outreach in DACs statewide to meet an installation target of 1,038 projects
3. Continue outreaching to highest-need communities, including tribal lands
4. Provide streamlined communication, education and long-term client support
5. Educate participants about energy efficiency and provide information about complementary programs and services
6. Recruit job training participants, with a focus on JTOs and 50 job trainees in DACs
7. Keep stakeholders informed about program impact and evaluation

Objective 1: Continue to assess outreach & promotional materials

GRID will continue to assess the promotional materials developed for DAC-SASH and identify opportunities for improvement or changes to be better positioned for efficient and effective outreach in 2024. This assessment will take place as we receive feedback from program participants and partners, and as clients' needs evolve, in particular in relation to any questions that arise from the shift to NBT. GRID will continue to track the evolution of NBT and other relevant rate changes and update promotional materials when relevant.

Objective 2: Conduct outreach to DACs statewide to meet an install target of 1,038 projects

GRID will continue to identify and outreach to qualified leads in DAC communities statewide. Given lessons learned implementing the program so far, our installation target for 2024 is 1,038 installations, which is more ambitious than previous year's goals. GRID will continue to

conduct outreach to households and job trainees throughout DACs, employing a combination of direct and indirect outreach by GRID's multicultural and multilingual staff. GRID will continue to rely on key partners – municipalities, IOUs, and CBOs – and important referral reward programs to promote the program to qualified clients. GRID will be flexible and nimble in order to adapt to shifting needs.

Direct Outreach

Outreach staff in GRID's California offices will undertake multiple kinds of outreach efforts, distributing DAC-SASH marketing materials to prospective clients in targeted communities. Direct outreach in a target community is often paired with indirect outreach such as media campaigns, as well as partner-based outreach to maximize exposure and build trust. Planned direct outreach activities include:

- Mixed in-person and digital outreach - Some of the planned strategies include more phone calls and check-ins to warm leads, as well as identifying which households are comfortable using email for correspondence and/or applying online.
- Mixed virtual and in-person events – GRID staff will participate in virtual community events to increase awareness of the program, provide resources and materials, answer questions, and promote solar and workforce development opportunities.
- Direct mail – GRID will continue to use the Faraday data service to generate lists of potentially qualified households and conduct direct mail campaigns to promote program participation. In addition, we will partner with local organizations and government agencies on co-marketing opportunities (see Partner-based outreach, below).

Indirect Outreach

- Advertising – Because of the high cost per qualified lead, advertising will be targeted and used sparingly. The use of this strategy will be limited and only used if great opportunities arise. A related effort GRID will undertake in 2024 is a website refresh, which should help increase traffic to the program website.
- Earned media – The use of this tool will be limited in 2024 due to reduced capacity but could include direct pitching to media outlets and occasional media events with local officials, businesses, and community leaders.
- Social media – GRID plans to drive traffic to our lead generation web pages and intake phone numbers through organic engagement with GRID's network of over 43,000 social media followers. Additional opportunities to leverage free social media tactics

will be explored. Regional offices employ social media to reach out to their current followers and to attract new followers. Followers include potential job trainees, potential employees, donors, and potential clients for one of GRID's programs. Channels for engagement include Facebook, Instagram, X (formerly Twitter) and LinkedIn (primarily for job training) depending on the audience the office is targeting.

- Referral Rewards program – In 2024 we will continue to market our \$200 Referral Rewards Program¹³ (along with partner referral rewards, if available) to existing clients who live in a DAC. In the past, we have been successful with direct mail referral marketing, where we send mailers to previous clients reminding them of the referral program, and will continue the strategy in 2024. Other efforts will include promoting the referral program via handouts existing clients can pass on to others that may qualify and encouraging them to speak to their acquaintances about the program. The most important way we market the referral program is via direct client conversations over the course of our work together with the client.

Partner-based Outreach

City partnerships

Marketing and outreach efforts in partnership with cities or municipalities will be a continued focus in 2024. Each partnership is unique and tailored and may include co-branded mailers, community workshops, virtual or in-person resource fairs or other city events, and communication channels where targeted communities may be present.

Community-based Organization (CBO) partnerships

Leveraging existing partnerships and developing new ones with local CBOs who are trusted partners in target communities will continue to be a focus in 2024. Examples of GRID CBO partners include Self-Help Enterprises Inc. and Habitat for Humanity. Partner activities may

¹³ GRID's Referral Rewards program is funded out of our organization's budget and does not allocate the DAC-SASH program's administrative or marketing and outreach budgets toward this initiative.

include direct referrals, distributing marketing collateral, sending emails, social media promotion, and including us in virtual events.

Co-marketing with IOUs

Since 2021, GRID has successfully collaborated with SCE’s Customer Programs & Services department to promote the DAC-SASH program. SCE sent co-branded marketing letters and now emails to thousands of CARE customers in targeted cities and included information and links to GRID’s client web forms on their website. SCE has been a steady collaborator and the partnership has been useful in raising awareness of the DAC-SASH program and in creating strong leads. We will continue this SCE marketing partnership into 2024, and since 2022 it has done so with PG&E as well, which it will also continue into 2024, now that the templates are setup. Due to the low number of leads and difficulty setting up and coordinating co-marketing activities with SDG&E in the past, GRID has decided not to pursue this strategy in SDG&E territory.

Below is a matrix summarizing planned outreach activities related to Objective 2.

Matrix 2: Outreach to DACs statewide, refining outreach technique and tools

Activity	Channels/ Tools	Audience(s)	Conversion metric	KPI(s)
Mailers to targeted lists	Print collateral	Homeowners in qualified DACs	Homeowners follow up for prescreen	# prescreens completed where Lead Source = List Acquisition (Mailer)

<p>Promote referral rewards:</p> <ul style="list-style-type: none"> -Direct mail marketing -Email marketing -Direct requests 	<p>Print collateral</p> <p>Email</p> <p>Phone</p>	<p>Homeowners in DACs</p>	<p>GRID clients and partners refer others; Homeowners get pre-screened</p>	<p># prescreens completed where lead is identified as referral</p>
<p>Leverage City partnerships to promote the program</p>	<p>Print collateral, direct mail & communication channels (like email), events</p>	<p>Homeowners in DACs</p>	<p>City partners promote program to residents; Homeowner gets pre-screened</p>	<p># of city partnerships; # prescreens completed in target city during promotion period</p>
<p>Leverage CBO partnerships to promote the program</p>	<p>Print collateral, email, social media, events</p>	<p>Homeowners in DACs</p>	<p>CBO partners market the program to their networks.</p>	<p># prescreens completed where lead is identified as CBO partner</p>
<p>Participate in community events</p>	<p>In-person and remote events and digital collateral and handouts</p>	<p>Homeowners and job seekers in DACs</p>	<p>Homeowner and job seekers provide contact info</p>	<p># leads (trainee and homeowner) where Lead Source = Event</p>



Objective 3: Outreach to Tribal Lands and San Joaquin Valley (SJV) communities

In 2024 GRID will continue its renewed focus on tribal lands and SJV communities, in order to focus energy, cost and time where outreach staff can be most successful. The high-need community categories listed below, have been identified by GRID as areas in particular need of a PV system through the DAC-SASH program due to electrification projects and often large residential loads in tribal communities. The community categories are:

- San Joaquin Valley (SJV) communities that are part of a PUC proceeding focused on gas and electric access and affordability
- Tribal lands as defined in D.20-12-003 or illustrated on the CES 4.0 DAC map¹⁴

Limitations to serving these communities

As GRID noted in its previous ME&O plans, the annual nature of the program’s incentive budget limits ME&O effectiveness potential in high-need communities. DAC-SASH incentive funding is especially limited in PG&E territory compared to demand and is likely to be a limiting factor in reaching many areas of the service territory. The program provides limited outreach and incentive dollars that must be used across DAC communities statewide. By necessity GRID must operate in areas where additional funding resources have been identified, such as funding from the TCC program. GRID applies this funding source along with additional private or municipal/county resources where available, to address funding gaps and barriers to solar such as old roofs or electric service panel upgrades. In 2024, GRID will continue to utilize TCC funding combined with DAC-SASH incentives in the Inland Empire and San Joaquin Valley. GRID will also continue work to promote the DAC-SASH program to eligible tribal communities. We will continue to build partnerships, in particular with tribal

¹⁴ <https://experience.arcgis.com/experience/1c21c53da8de48f1b946f3402fbae55c/page/SB-535-Disadvantaged-Communities/>

partners with whom we have lost contact or with whom we seek a stronger partnership. This will promote the program and lay the groundwork for client acquisition in new communities, focusing on successful outreach tactics outlined throughout this plan. Fully funding the projects has been more challenging due to the lack of a TPO option for homes located on tribal lands, but that may change in 2024 with the advent of Elective Pay for tribes and non-profits. In the meantime, GRID applies for Department of Energy federal grants as well as other grant programs and it has also received significant corporate funding to make up funding gaps.

Below is a summary of activities GRID will pursue in 2024 to acquire clients and deepen partnerships in California’s Tribal lands and SJV communities.

Matrix 3: Continue Outreaching to Highest Need Communities

Activity	Channels/ Tools	Audience(s)	Conversion Metrics	KPI(s)
Conduct outreach in communities with established GRID presence/partnerships	Multiple: See Objective 2 tools	Homeowners	Homeowners are prescreened	# of lead prescreens in target community

Job trainee outreach in communities with established GRID presence/partnerships	Partner organizations, tabling, website interest form	Job seekers in DACs	Job seekers enrolled in GRID training programs	# of trainees signed-up for training in target community
Partnerships with cities and CBOs through direct outreach and education	Co-marketing, virtual events	Cities and CBOs in DACs	Targeted cities and CBOs agree to partner	# of target cities/CBOs that agree to partner
Outreach to tribal communities	Based on each Tribe	Tribal Members	Installed tribal homes or new tribal partners connected with	# of lead prescreens in tribal communities

Objective 4: Provide streamlined communication, education, and long-term client support

GRID’s approach will continue to be based on long-term engagement in the communities that we serve. We will provide a fully supported and streamlined process for clients from initial outreach to installation and beyond, limiting applicant drop-outs where possible and maximizing impact for participants. Key elements in 2024 will include the following:

Centralized Intake Team

GRID’s client Intake team handles web inquiries as well as inbound phone calls. The Intake Team prequalifies prospective single-family homeowners and carefully explains to prospects

the requirements of the DAC-SASH program. The Intake Team staff can be reached easily and is English-Spanish bilingual. For prospective clients who are more comfortable communicating in another language, GRID employs an on-call translation service. Qualifying information for each potential client is captured by the Intake Team in our CRM Salesforce database. This team is managed centrally, and prospective clients who are pre-qualified are connected directly to Outreach Coordinators in each region to complete the application process.

Local Outreach Staff

GRID's outreach staff has a continued presence in the communities we serve and is able to immediately pre-qualify homeowners. Our multicultural staff offers a flexible, personalized outreach experience that ensures equitable access to the program regardless of race, abilities, age, language, culture, gender identity, educational attainment, or technological savvy. GRID also provides accommodations to reduce barriers to participation to individuals that are deaf/hard of hearing and blind/vision impaired, as well as clients with physical disabilities, limited mobility, cognitive or psychiatric impairments or have transportation challenges. Once a prospective client has been prequalified, regional outreach staff provide support, education, serve as liaisons as well as advocates for each client through the application process. This support, education and advocacy continues throughout the multi-step installation process as well after the solar project is interconnected.

Client Education and Support

Outreach staff activities include community and household outreach; solar and energy efficiency education; referrals to complementary programs (see Objective 5, below); application support; review of solar designs and site plans; extensive remote assistance and education with contract review including terms and conditions of a third-party ownership contract (when applicable); education on system monitoring and maintenance; energy bill interpretation; and ongoing post-installation support and education. An updated educational component in 2024 will be answering questions from clients about NBT and the utility implementation of NBT through the Solar Billing Plan (SBP).

Focus on Program Access and Efficiency

It is not uncommon for a lower income household, particularly in rural areas, to have limited or no access to the internet and unreliable cell service. Some households do not have access

to a computer or a smartphone. In 2024, GRID will go above and beyond to mitigate technological barriers and ensure equitable access to the DAC-SASH program. However, where clients are open to applying online, the new electronic application for DAC-SASH will make applying to the program more efficient for staff and clients.

Client Feedback

Measuring homeowner’s experience and satisfaction with the program is crucial in assessing the qualitative and depth of impact of the program. This measurement is achieved via two surveys. The first is sent after the system has been interconnected (i.e. post-installation) and the second survey on an annual basis to assess long-term program satisfaction. Both surveys are an opportunity for homeowners to rate their experience with GRID by way of a Net Promoter Score¹⁵, comments and feedback on the program that can help identify opportunities for improvement and deepen program impacts.

Long-Term Client Support

Continued support and assistance after the installation must be part of a client’s journey to ensure a positive experience and achieve the deep community impact envisioned by the DAC-SASH program. In addition to the tailored approach taken by outreach staff, GRID will continue to provide a centralized, multilingual phone and email system, to streamline service calls or maintenance questions. Finally, educational information and resources are made available on GRID’s website and via email communication to reinforce the education and support provided by outreach staff. All communication and educational materials are designed to be understood by a variety of education levels, available in multiple languages and offered in a variety of accessible print materials.

Below is a summary matrix of the activities GRID will undertake to provide streamlined communication, education and long-term client support.

Matrix 4: Streamlined Communication, Education, and Long-term Client Support

¹⁵ The Net Promoter Score question asks clients “On a scale from 0 to 10, how likely are you to recommend GRID to a friend or colleague?”

Activity	Channels/ Tools	Audience(s)	Conversion Metric	KPI(s)
Pre-qualify homeowners with bilingual intake team with on-call translation service	Web and phone	Homeowners in DACs	Homeowners are successfully prequalified	# of Prescreened Leads from Intake
Outreach staff to provide direct education and support to clients throughout the application process	Phone/email/print collateral/in-person as needed	Homeowners in DACs	Prequalified homeowners complete the application process	# and % of pre-qualified clients who complete an application and provide eligibility documentation
Educate clients on solar, energy efficiency and conservation, solar system maintenance and monitoring	In-person/phone/email/print collateral	Clients	Clients indicate understanding of subjects	Average client rating on post-install survey educational questions >3 (scale of 1-5)
Provide clients with post-installation survey assessing satisfaction with solar installation process	Email, in-person	Clients	Clients complete the survey	Survey average rating; Net Promoter Score > 6 (scale of 0-10)

Send clients annual survey assessing long-term program satisfaction	Email	Clients	Clients complete the survey	Survey average rating; Net Promoter Score > 6 (scale of 0-10)
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Objective 5: Educate participants about energy efficiency and provide information about complementary programs and services

GRID provides clients with energy efficiency education and referrals to complementary programs to maximize the impact of their participation in DAC-SASH. In 2024 GRID will continue to include energy storage, electric vehicle (EV), EV charger services or other programs into its education and information dissemination as appropriate.

Education about Energy Efficiency and Conservation

Information about energy efficiency and conservation allows clients to benefit the most from their solar energy systems and understand how their behavior can impact energy bills and savings. Our goals include changing perceptions about energy production and use, teaching participants the importance of conserving energy to reduce energy costs and prevent greenhouse gas emissions, and improving understanding of time-of-use rates to maximize savings. While GRID provides this information, it is ultimately up to the client whether this knowledge is applied in their household.

Referrals to / Provide Information about Complementary Programs

Many GRID participants qualify for other renewable energy and related programs offered by the state or other entities. Outreach staff provide referrals to, and information about, the following programs, where applicable:

Energy Assistance Programs

GRID's outreach staff provides information to all clients about utility-administered California Alternate Rates for Energy (CARE), Family Electric Rate Assistance (FERA), and the Energy Savings Assistance (ESAP) Program. Outreach staff introduce clients to these programs, encourage enrollment for enhanced energy and cost saving benefits, and GRID also centrally refers clients directly to the IOUs. GRID shares basic client information with the IOUs to facilitate enrollment in these assistance programs that are free to participate in for low-income households. Furthermore, we have established a process with PG&E for clients to be signed up automatically for CARE/FERA upon referral to the utility from GRID. In SCE and SDG&E territories GRID staff are assisting clients with enrollment, but there is not yet a similar automated process as in PG&E. GRID plans to reengage SCE and SDG&E regarding an automated process similar to PG&E in 2024.

Clean Mobility Programs

It will again be a goal to serve DAC-SASH clients with clean mobility or EV charger services offered by GRID, whenever relevant and practical. GRID administers a number of relevant low-income EV and EV charging programs for CA agencies and utilities, including the CA Air Resources Board, the Bay Area Air Quality Management District, San Diego County Air Pollution Control District, the California Energy Commission, and utilities overseen by the CPUC. GRID is working to ensure that DAC-SASH participants receive accurate information about and are referred to EV programs that can provide access to another cost-saving technology. GRID continues to finetune its process to facilitate referrals between programs and logistics coordination, including hiring on staff to more fully manage clean mobility services and funding. We aim to expand layered offerings when eligibility aligns, to make EVs and EV infrastructure affordable and accessible to DAC homeowners, while also ensuring the state's transition to cleaner transportation options is inclusive and sustainable. To facilitate co-leveraging with clean mobility programs, GRID's work to digitize the DAC SASH application in 2023, included work to add it to Access Clean California's¹⁶ benefits finder.

¹⁶ Access Clean California provides application assistance to clients with low- to moderate-income who are applying for clean energy benefits. To learn more visit their website: <https://accesscleanca.org/about>

Self-Generation Incentive Program (SGIP)

In late 2019, Decision 19-09-027 enabled households that qualify for DAC-SASH to also qualify for the SGIP Equity and Resiliency budget (ERB) and its incentives for energy storage. GRID continues to work with its primary TPO partner, Sunrun, as well as Swell to explore better integrating battery storage into its PV-model. The biggest hurdles to providing battery storage to existing and future DAC-SASH participants is the minimal overlap in eligibility between the two programs. The program uses different qualifying criteria which means the DAC-SASH program's eligibility maps and the SGIP ERB eligibility map are almost the inverse of each other, other than for tribal lands.¹⁷ Tribal work is not handled through marketing, but via developed relationships between our outreach staff and Tribal Liaisons. We will continue to work closely with Tribal governments to determine the best ways each Tribe can make use of the incentives. GRID looks forward to evaluating SGIP program developments in the regulatory space, including program eligibility changes which will hopefully support increased SGIP-supported storage attachment to DAC-SASH-supported solar energy systems, and working with the CPUC and SGIP Program Administrators to support robust program co-leveraging in 2024, particularly given the implications for savings wrought by NBT, which improve with storage attachment.

Home electrification and decarbonization programs - GRID is closely tracking other low-income-focused home electrification and decarbonization programs flowing from both the federal and state governments. For example, the CEC's forthcoming Equitable Building Decarbonization (EBD) Program will provide \$922m to support the direct installation of gas-to-electric home electrification measures, such as heat pumps and heat pump water heaters, induction cook stoves, and electric dryers; and fortunately, proof of enrollment in DAC-SASH enables automatic eligibility for EDB, which will also fund MSP upgrades where needed. Similarly, the CEC is working to align EBD rollout with California's share of related IRA resources intended to spur the same measures like the Homeowner Managing Energy Saving (HOMES) Rebate Program, and the High-Efficiency Electric Home Rebate (HEEHRA) Program.

¹⁷ There are 77 known tribes in California that fall fully or partially in the HFTD, the publicly known geographic threshold for the SGIP ERB. Thus, the low-income populations of 77 tribes across the state will be eligible for no-cost solar and storage to provide resilience in the face of climate change impacts

GRID will confer with CPUC ED to explore co-leveraging of these new resources as they become available.

Additional Services

Depending on the resources available in California regions, GRID’s outreach staff and its Intake Team may refer participating homeowners to other programs such as re-roofing or rehab programs, legal assistance programs, food assistance, social services and more. Every household is unique and providing resources that meet a household’s needs is integral to our client-centric approach.

Below is a matrix summarizing activities GRID will undertake to educate participants about Energy efficiency and Complementary programs or services. As federal investments stemming from the Bipartisan Infrastructure Law and Inflation Reduction Act begin flowing in 2024, GRID looks forward to updating and expanding this list of complementary services and programs.

Matrix 5: Educate Participants about Complementary Programs and Services

Activity	Channels/ Tools	Audience(s)	Conversion Metrics	KPI(s)
Continue to make accessible energy efficiency and conservation info. on our website and direct homeowners to it via handouts and emails	Online/email/print collateral	Homeowners in DACs	Website users visit pages dedicated to energy efficiency and conservation	# of web page views, time spent on pages

Refer clients to IOU energy assistance programs	In-person/print collateral/e mail	Homeowners in DACs	Clients sign up for assistance programs	# of participating homeowners referred to CARE or FERA
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Objective 6: Recruit job training participants, with a focus on Job Training Organizations and 50 trainees in DACs

The DAC-SASH training requirements can play a crucial role in training individuals who seek resilient employment. GRID will continue and expand its valuable workforce development and trainee recruitment in 2024. GRID will continue to leverage its community networks and work with job training organizations (JTOs) located in and working with DACs to engage at least 50 residents of DACs in GRID’s comprehensive training programs. This will consist of either hands-on installation on a DAC-SASH project, a small cohort of in-person lab work, and/or GRID’s full IBT 200 training.

Trainee Outreach

Job trainees are often recruited to GRID’s training programming through our client outreach teams or learn about the program from family and community members receiving solar. Other outreach channels to recruit trainees include media, canvassing and partner outreach. Word-of-mouth is expected to continue to drive trainee recruitment in 2024.

Job training organization (JTO) Partnerships

GRID has active partnerships with 30+ job training organizations and community colleges throughout California, 17 of which are located in or serve residents of DACs. GRID will continue to work with these JTOs to provide hand-on training to their current students and recruit their graduates into GRID’s more extensive Installation Basics Training (IBT) program. We will continue to leverage and ideally expand existing partnerships to engage DAC residents in GRID training and seek to develop new partnerships.

Below is a matrix summarizing activities aimed at recruiting job trainees located in DACs, to participate in the program.

Matrix 6: Recruit Job Training Participants, with a focus on JTOs and job trainees in DACs

Activity	Channels/ Tools	Audience(s)	Conversion Metrics	KPI(s)
Recruit individual trainees from DACs through client outreach channels	Multiple - see Objective 2	Job seekers in DACs, household members of participating clients	Trainees participate in a GRID training program or installation	# of trainees from DACs who sign up for an install or GRID training program; Hours of participation by these trainees
Engage existing JTO partners in/ serving DACs to provide job training to students	Direct outreach	Job training organizations (JTOs)	JTO students participate in GRID training program or installations	# of JTO partners; # of JTO students enrolled in GRID training program or in a DAC-SASH installation
Identify new JTO partners through direct outreach and education	Print collateral, PowerPoint presentation s/ events	Job training organizations	JTOs partner with GRID to provide training to their students	# of new JTO partners

Objective 7: Keep stakeholders informed about program

In 2024 GRID will continue to actively inform stakeholders about the program’s success and challenges, addressing some of the nuanced recommendations that came from its first third-

party program evaluation. It will do so through a broad effort centered around consistent public reporting, community engagement, education, and the CPUC regulatory process. Below is a summary of 2024 activities that will keep stakeholders informed about DAC-SASH's impact.

Matrix 7: Inform Stakeholders about Program Impact

Activity	Channels/ Tools	Audience(s)	Conversion Metric	KPI(s)
Maintain a page on GRID website describing program and linking to reports and data	Web/online	All stakeholders	Public and stakeholders access program information and data	# views and downloads of program data from GRID website
Media/ Storytelling	Press releases, Blogs, Direct media outreach	Energy Division, IOUs, broad stakeholders across the state and nation who are interested in program outcomes	Program is mentioned in media; Stakeholders read success stories	# and reach of social media posts; # blog pageviews; # press releases; # articles

Evaluation

The DAC-SASH program is formally evaluated by an independent third party contracted by the CPUC every three years. The program's first third-party evaluation commenced in late 2021 and was finalized on April 28, 2023.¹⁸ GRID was heavily involved throughout Evergreen Economics' information-gathering process. This was followed by GRID's review of the evaluator's draft and final recommendations and responses to each recommendation. The evaluation included an assessment of Program Administration, Identification of Eligible Customers, Marketing to Customers, and much more. Broadly, the assessment found that GRID is a trusted partner in communities, is known, effective, and provides high-quality PV systems and customer experiences.

Every program year, GRID employs an active feedback/evaluation/modification process in its role overseeing statewide ME&O to ensure that DAC-SASH provides maximum community benefit. GRID actively monitors data and surveys clients throughout the project process to better understand barriers to entry, reasons for dropouts, and client satisfaction with the services provided. Client feedback is included in ME&O reporting and twice per year in progress reports.

Data Collection

Since the program launch in September 2019, GRID collected data on key performance indicators (KPIs) and metrics outlined in the program's ME&O Plan in order to create a program baseline. KPI outcomes are highlighted in the "In Review" section of this plan. In 2024 GRID will continue to track KPIs across ME&O objectives, determining where there are information gaps and gaining more insight on the program's progress.

Stakeholder Engagement

GRID will continue to engage a broad group of stakeholders and community members in the program. GRID may engage with the Disadvantaged Communities Advisory Group (DAC-AG) to gather input on the program and opportunities for improvement. A strong feedback loop

¹⁸ [Process and Load Impact Evaluation of DAC-SASH Program](#). April 28, 2023. Evergreen Economics

empowers GRID to modify its ME&O strategies and ensure its approach is successful in the communities it is designed to serve.

Appendix A: 2024 ME&O Budget

In Appendix A, GRID includes a budget for program activities for 2024 that are directly related to ME&O. Because the DAC-SASH budget is capped for marketing and outreach at 4% of the annual budget (or \$400,000), GRID has limited this budget to that amount. GRID notes that its actual expenses to conduct statewide ME&O for the DAC-SASH program are considerably higher for both labor and non-labor expenses. GRID will allocate ~\$42,000 of the \$400,000 M&O budget to non-labor costs and will allocate the remaining \$358,000 toward labor costs for outreach staff. GRID will apply its own fundraising dollars and resources to cover additional ME&O costs that will not be recouped from the program budget.

The budget below provides a high-level estimate of labor and non-labor costs, but these costs and the calendar quarter in which they will be incurred may be modified in 2024 as best suits the ME&O objectives. For non-labor costs, GRID plans to subcontract with the following entities for ME&O activities and provides this description:

- Translation Services from LinguaLinx - Translation services for adding to GRID's portfolio of multilingual materials, and crucially for live phone translation services
- Printing from Alpha Press - Printing of outreach marketing collateral
- Mail shop services from Precise Mailing - Sending outreach marketing materials for client acquisition
- Photography - Professional photography services as needed
- Advertising – Paid advertising as needed

Disadvantaged Communities – Single-Family Solar Homes Program

2024 ME&O Plan



		DAC-SASH Year 2024 ME&O Plan Budget (Forecast)									
		Q1		Q2		Q3		Q4		TOTAL	
		Labor	Non-Labor	Labor	Non-Labor	Labor	Non-Labor	Labor	Non-Labor	Labor	Non-Labor
DAC SASH M&O02 - Marketing & Communication	Translation Services		\$ 1,000		\$ 1,000		\$ 1,000		\$ 1,000	\$ -	\$ 4,000
	Advertising		\$ 3,750		\$ 3,750		\$ 3,750		\$ 3,750		\$ 15,000
	Photography		\$ 250		\$ 250		\$ 250		\$ 250	\$ -	\$ 1,000
	Graphic Design		\$ 1,000		\$ 1,000		\$ 1,000		\$ 1,000	\$ -	\$ 4,000
	Printing		\$ 3,500		\$ 5,500		\$ 5,500		\$ 3,500	\$ -	\$ 18,000
	Communications Coordinator (~2% FTE)	\$ -		\$ 1,100		\$ 1,100		\$ 1,100		\$ 3,300	
	Director, Outreach Marketing (~10% FTE)	\$ 6,350		\$ 6,350		\$ 6,350		\$ 6,350		\$ 25,400	
	Regional Outreach Manager (~5% FTE)	\$ 2,840		\$ 2,840		\$ 2,840		\$ 2,840		\$ 11,360	
	Regional Outreach Coordinator (~5% FTE)	\$ 2,370		\$ 2,370		\$ 2,370		\$ 2,370		\$ 9,480	
Director, Marketing (~2% FTE)	\$ 1,450		\$ 1,450		\$ 1,450		\$ 1,450		\$ 5,800		
DAC SASH M&O01 - Community-Based Organizations (CBOs)	Regional Outreach Manager (~5% FTE)	\$ 2,830		\$ 2,830		\$ 2,830		\$ 2,830		\$ 11,320	
	Director, Outreach Marketing (~1% FTE)	\$ 700		\$ 700		\$ 700		\$ 700		\$ 2,800	
DAC SASH M&O03 - Client Acquisition & Support	Regional Outreach Coordinator (~1.5 FTE)	\$ 71,000		\$ 71,000		\$ 71,000		\$ 71,000		\$ 284,000	
	Regional Outreach Manager (~2% FTE)	\$ 1,135		\$ 1,135		\$ 1,135		\$ 1,135		\$ 4,540	
Totals		\$ 88,675	\$ 9,500	\$ 89,775	\$ 11,500	\$ 89,775	\$ 11,500	\$ 89,775	\$ 9,500	\$ 358,000	\$ 42,000

Total Labor	\$ 358,000
Total Non-Labor	\$ 42,000
Grand Total	\$ 400,000

Appendix B: Sample of Marketing Materials

In Appendix B, GRID includes a sample of marketing materials that are used to inform clients about the program.

「Energy for All (能源普及)」計劃幫助您支付能源帳單

符合資格的房屋業主可以從這一全州計劃中獲得補助

如果您有自有住房，且符合或低於以下收入要求，則您可能享受在屋頂免費安裝太陽能系統的福利。

「ENERGY FOR ALL (能源普及)」計劃將幫助您：

- 節省開支
- 進行住宅投資
- 為您的鄰里區提供清潔能源
- 成為您所在社區的清潔能源領導者

立即聯絡我們，瞭解您是否符合我們的電費省錢計劃：

請致電 **866-921-4696**

或瀏覽 EnergyForAllProgram.org



Hazin Raihaed Photography

您是否
符合資格？

家庭人口	最高家庭年收入
1-2人	\$39,440
3人	\$62,150
4人	\$75,000
5人	\$87,850
6人	\$100,700
7人	\$113,550

收入限制將於
2024年6月1日
到期。

幫助您和您的美鄰



Disadvantaged Communities - Single-Family Solar Homes (弱勢社區-單戶太陽能住宅計劃，簡稱DAC-SASH) 由加州公用事業委員會負責監督，並由 GRID Alternatives 透過「Energy

for All (能源普及)」計劃進行管理。GRID Alternatives 是一個以社區為基礎的非營利組織，在加州各地設有辦事處。



GRID Alternatives **Bay Area**
1171 Ocean Ave, Suite 200 • Oakland CA 94608

GRID Alternatives 是一家完全取得許可的太陽能承包商，加州許可證編號：867533





Hasan Raheed Photography

Get help paying your energy bills with the Energy for All Program

Qualified homeowners can get help from a statewide program

If you own your home and are at or below these income requirements, you may qualify to get a **no-cost solar system** on your roof.

THE ENERGY FOR ALL PROGRAM WILL HELP YOU:

- Save money
- Invest in your home
- Bring clean power to your neighborhood
- Be a clean energy leader in your community

Do you qualify?

PEOPLE IN YOUR HOUSEHOLD	MAX ANNUAL HOUSEHOLD INCOME
1-2	\$39,440
3	\$62,150
4	\$75,000
5	\$87,850
6	\$100,700
7	\$113,550

Income limits
expire 6/1/24

Contact us today and find out if you qualify for our energy savings program:

Call **866-921-4696**

Or visit **EnergyForAllProgram.org**

Helping You and Your Neighbors



Disadvantaged Communities - Single-Family Solar Homes (DAC-SASH) program is overseen by the California Public Utilities Commission and

administered by GRID Alternatives through the **Energy for All Program**. GRID Alternatives is a community-based nonprofit organization with offices throughout California.



GRID Alternatives **Bay Area**

1171 Ocean Ave, Suite 200 • Oakland CA 94608

GRID Alternatives is a fully licensed solar contractor, California License #867533





Get ahead of your energy bills with a solar system from GRID!

Solar will help you pay less for energy while helping the environment.



¡Adelántese a su factura de energía con un sistema solar de GRID!

La energía solar lo ayudará a pagar menos por la energía mientras ayuda al medio ambiente.



Disadvantaged Communities – Single-Family Solar Homes (DAC-SASH) is a program overseen by the California Public Utilities Commission and administered by GRID Alternatives through the Energy for All Program. GRID Alternatives is a community-based nonprofit organization with offices throughout California.

Disadvantaged Communities – Single-Family Solar Homes (DAC-SASH) es un programa supervisado por la Comisión de Servicios Públicos de California y administrado por GRID Alternatives a través del programa Energy for All (Energía para Todos). GRID Alternatives es una organización comunitaria sin fines de lucro con oficinas a lo largo y ancho de California.

CONTACT US / CONTACTENOS:

866-921-4696

EnergyForAllProgram.org/CA

EnergyForAllProgram.org/CA-es



GRID Alternatives is a fully licensed solar contractor / es un contratista de energía solar plenamente autorizado, CA Lic. #867533

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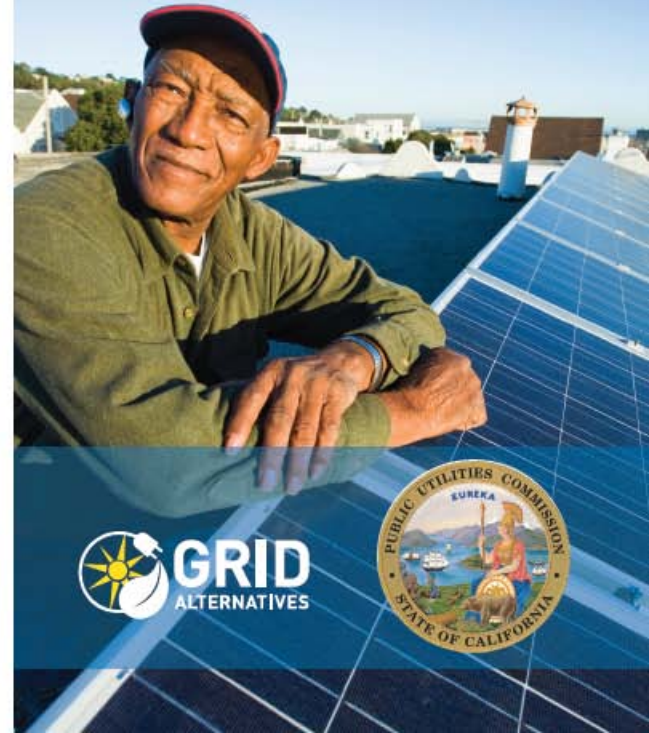


STATE OF CALIFORNIA **Solar Energy Program**

For Low-Income Homeowners

ESTADO DE CALIFORNIA **Programa de Energía Solar**

Para Propietarios de Vivienda De Bajos Ingresos





Do you pay more than you can afford for electricity?

You might qualify for a statewide program to help pay your energy bills with solar on your roof.

OUR PROGRAM WILL HELP YOU:

- Save money
- Invest in your home
- Bring clean power to your neighborhood
- Be a clean energy leader in your community

Contact us today and find out if you qualify!

CALL **866-921-4696**

OR VISIT EnergyForAllProgram.org/CA

¿Paga más de lo que puede pagar por la electricidad?

Puede calificar para un programa estatal para ayudar a pagar su factura de energía con energía solar en su techo.

NUESTRO PROGRAMA LE AYUDARA A:

- A ahorrar dinero
- Invertir en su casa
- Traer energía limpia a su comunidad
- Ser un líder de energía limpia

¡Contactenos hoy y averigüe si califica!

LLAME AL **866-921-4696**

O VISITE EnergyForAllProgram.org/CA-es



Hasain Raheed Photography

Is your family's income at or below these income limits? Do you own your home? Call us to find out if you live in a qualified area!

¿Los ingresos de su familia son iguales o menores a los siguientes límites? ¿Es dueño de su casa? ¡Llámenos para averiguar si vive en un área calificada!

HOUSEHOLD SIZE TAMAÑO DEL HOGAR	ANNUAL INCOME INGRESOS ANUALES
1-2	\$39,440
3	\$62,150
4	\$75,000
5	\$87,850
6	\$100,700
7	\$113,550

Do you qualify?

Income limits expire 6/1/24

"We're very grateful for this program and the money we save on electric bills will really make a difference for our family."

— Salvador Jimenez, Perris, CA