

Disadvantaged Communities – Single-Family Solar Homes Program

2021 Marketing, Education and Outreach Plan



TABLE OF CONTENTS

TABLE OF CONTENTS..... 2

I. Introduction..... 4

- About the 2021 DAC-SASH ME&O Plan.....4
- About the DAC-SASH Program.....4
- COVID-19 Impacts in 2020.....4

II. Review of 2020 Objectives and KPIs 9

- Objective 1: Develop accessible outreach and promotional materials.....9
- Objective 2: Conduct broad-based outreach to DACs statewide to meet a statewide installation target of 866 projects.....9
- Objective 3: Target Highest Need Communities..... 11
- Objective 4: Provide streamlined communication, education, and long-term client support13
- Objective 5: Provide information and educate participants about energy efficiency and complementary programs and services 15
- Objective 6: Recruit job training participants, with a focus on Job Training Organizations and job trainees in DACs..... 16
- Objective 7: Keep stakeholders informed about program impact..... 18

III. Key Program Audiences..... 20

- Low income homeowners located in DACs 20
- Tribal communities..... 20
- Job trainees..... 21
- Other key stakeholders 21

IV. Strategic Approach..... 22

- Holistic Approach with Focus on Trust-Building 22
- Focus on Direct Mail, Word-of-Mouth, and Partner-Based Marketing 22
- Financial Tools for Gap Financing in DACs 23

Alignment with Statewide ME&O Efforts	23
V. Installation Targets in 2021 and Potential Challenges	24
Installation Targets in 2021 and Beyond	24
Geographic Scope in 2021	25
Limitations of Program Eligibility Requirements in SDG&E territory.....	26
VI. Program Objectives in 2021	28
Goals for Marketing, Education and Outreach.....	28
Objective 1: Assess outreach & promotional materials, especially given enhanced remote and digital outreach required in 2021	28
Objective 2: Conduct outreach to DACs statewide to meet an install target of 535 projects	29
Objective 3: Continue Outreaching to Highest-Need communities.....	32
Objective 4: Provide streamlined communication, education, and long-term client support	35
Objective 5: Educate participants about energy efficiency and provide information about complementary programs and services	38
Objective 6: Recruit job training participants, with a focus on Job Training Organizations and 50 trainees in DACs	41
Trainee Outreach	41
Job training organization (JTO) Partnerships.....	41
Subcontractor Program.....	41
Employment connections.....	42
Objective 7: Keep stakeholders informed about program and COVID impacts	44
VII. Evaluation.....	45
Appendix A: 2021 ME&O Budget.....	46
Appendix B: How GRID intends to use new IOU data or targeted leads in 2021	49

I. Introduction

About the 2021 DAC-SASH ME&O Plan

The Disadvantaged Communities Single-family Solar Homes (DAC-SASH) program's 2021 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 2020, the program's first 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 other 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 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 and receive the greatest benefit from their solar system. In communities often targeted by predatory practices, demonstrating investment in long-term household and community benefit is an essential component of the program. GRID's approach ensures that disadvantaged communities reap the financial benefits of installing solar over the lifetime of the systems.

COVID-19 Impacts in 2020

The COVID-19 pandemic has significantly affected GRID's operations in 2020, including the ME&O efforts of the DAC-SASH program. During the initial shelter in place order in March, GRID was temporarily unable to install in some regions. As the statewide response to the pandemic

evolved and solar installations resumed as an essential service, there have been persistent issues in construction logistics and marketing and outreach approaches, that have impacted efficiency. For example, some clients still do not feel comfortable proceeding with an application due to the pandemic despite the safety measures in place. Reaching out to underserved communities remotely has in many cases led to slower turnaround times of client applications and documentation and has required creativity to find new ways of ensuring that participants receive a high level of care. This has diminished progress towards 2020 ME&O objectives and some Key Performance Indicators (KPIs).

GRID continues to follow and adapt to federal, state and local guidance and directives in order to execute the DAC-SASH program in a safe manner. Because solar was quickly deemed an essential service by the state, GRID was able to continue offering the benefits of the DAC-SASH program to participants, yet with substantial modifications to comply with local or statewide orders. GRID implemented physical distancing requirements between staff and clients, no-contact outreach protocols, suspended on-site job training, and has required several COVID-19 trainings of its full staff. In order to keep staff and clients safe, continues to refine these new processes. Finally, GRID has been unable to include job trainees in onsite installation since March 2020 and expects this to continue into 2021.

Overall, the DAC-SASH program's ME&O have been negatively impacted in multiple ways, including slower outreach processes, a reduced installation pipeline, and costs that exceed what was budgeted on a per project basis for 2020. COVID-19 has required technology that increases the cost and effort to reach individuals with technological barriers who are often the most vulnerable population and who face numerous challenges to participate in a remote outreach process. Below, GRID outlines in more detail the program impact and process modifications we made in response to COVID-19.

Marketing, Outreach and Education

- **Impact:** In March 2020 GRID ceased in-person ME&O and client support, except for in rare cases when it was necessary to serve clients in-person. The pandemic pushed GRID to institute new tools and processes to shift to remote application sign-ups, education, document signing and support. This required additional strategizing, systems and tools and staff time and training to successfully implement across our offices statewide. COVID has amplified the long-standing digital divide that exists in disadvantaged communities and makes remote client outreach and support, such as paperwork retrieval and documentation assistance, far more challenging.

- Modifications: GRID staff worked hard to pivot as quickly as possible to remote ME&O and support. This was a significant undertaking that will continue to require additional work in 2021 to build upon the new processes created this year. For clients experiencing technological barriers or with no digital access, we identified workarounds such as mailing paperwork or conducting no-contact drop offs and pick-ups of outreach materials which we continuously re-assess as the situation evolves.

Installation Pipeline¹

- Impact: Many installations were postponed or delayed in Q2 and Q3 because of local directives. GRID adapted its installation work to meet COVID-19 safety precautions and permitting offices’ modified processes which slowed the program’s project pipeline considerably in some areas and far less in others. Despite these challenges, installations still occurred each month in 2020, yet often at lower levels than forecast. We estimate that the program will install roughly 57% of the DAC-SASH solar electric systems initially projected for 2020, due to the pandemic. The number of systems installed from Q1 to Q3, plus GRID’s Q4 projection are outlined in Table 1 below.

Table 1: 2020 Target compared to Actual Installations

	2020 Target Installations	Q1-Q3 2020 Installations	Q4 2020 Projection	2020 Actual Installations	% of Target compared to Actual
PG&E	459	211	49	260	57%
SCE	349	137	86	223	64%
SDG&E	58	8	4	12	21%
Total	866	356	139	495	57%

- Modifications: GRID has instituted social distancing guidelines, no-contact installations, use of masks and increased sanitation for installers, a method for contact tracing, and follows all Occupational Safety and Health Administration (OSHA) directives and state and local requirements. GRID is also adapting to local jurisdictions’ permitting and inspection processes as these entities learn to navigate remote operations.

¹ *Third-party compliance inspections*: GRID remained in close contact with inspectors to determine when it was safe to restart the program’s compliance inspections that are required for 10% of projects installed. *Interconnections and permitting*: These were paused in some cases and slower across the board in Q2 and Q3 2020.

Job Training and Recruitment

- **Impact:** GRID eliminated all general volunteers and group job training participation in rooftop installations; all of GRID's current installations are being conducted without its trademark job training groups on-site and only GRID's full-time staff, SolarCorps Fellows, and some interns are currently installing on-site. GRID also paused all hands-on job training initiatives and many Job Training Organization (JTO) partners, who would typically send students to a GRID installation, paused or cancelled their in-person training.
- **Modifications:** GRID worked with the Energy Division to approve Advice Letter 15, *"Proposed Modifications to the Single-family Affordable Solar Homes (SASH) and Disadvantaged Communities Single-family Solar Homes (DAC-SASH) Programs' Job Training Requirements in Response to the COVID-19 Pandemic,"* which created a waiver option to the job training requirement associated with each installation. To date we have used fewer than ten waivers but it prioritizes safety and gives GRID flexibility in cases when they arise. Due to recognized physical distancing guidelines, GRID dramatically modified its job training offerings in 2020 and is developing and enhancing its online training opportunities and resources (see Objective 6 below for more details). GRID is investing in quality online or distance training tools and has downsized in-person cohorts. GRID has also established strict safety policies allowing some offices to return to in-person job training. To maintain staff and client safety, training cohorts remain prohibited from on-site installation, but trainees are able to gain skills in classroom settings and on mock structures in training labs. The number of trainees GRID can engage is still significantly limited due to caps on cohort sizes.

Project Funding and Gap Financing

- **Impact:** As described in program reporting,² the success of the DAC-SASH program is predicated in part on GRID's ability to bring additional funding resources to projects, in addition to the program incentive. GRID covers the majority of the funding gap for solar through resources from its third-party ownership model for roughly 80% of DAC-SASH projects,³ philanthropic resources, local funding such as grants, or miscellaneous funding

² See, [DAC-SASH Semi-Annual Progress Report](#), July 2020, pg. 11

³ ~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.

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 and conduct statewide marketing and outreach. COVID impacts and a general tightening of credit markets has impacted GRID's ability to consistently deliver sufficient financing for the DAC-SASH program. As budgets tighten in all industries, private funders are reducing or retracting funding and in-kind donations, putting further strain on GRID's ability to deliver on its ME&O objectives. GRID's line of credit, which we rely on to cover the subset of costs that will be recouped by the incentive, was also lowered due to COVID-19 impacts. Finally, these funding challenges are further compounded by the continued reduction in the Investment Tax Credit (ITC) which is the backbone of the Third-Party mode and scheduled to sunset in 2022. As a result of this reduction in financial resources, GRID has furloughed some staff, which limits our program capacity.

- Modification: GRID has been working in collaboration with the Energy Division and IOUs to explore the potential for an incentive advance process in DAC-SASH, which would alleviate some cash flow and line of credit challenges. GRID is optimistic this will be approved for at least one IOU in 2021, providing some cash flow relief. However, the general reduction in philanthropic and other financial resources available to apply to DAC-SASH project costs continues to be an issue and may jeopardize the program's success, as it relies on GRID's ability to apply its own non-profit fundraising to meet the program's scale.

II. Review of 2020 Objectives and KPIs

GRID identified seven core objectives in its first ME&O plan for 2020. These were identified to help launch the program, achieve its participation goals, and maximize the long-term impact for homeowners and households, job trainees and communities as a whole. These core objectives and KPIs will may be updated as the program unfolds. In this section we provide an overview of the program's 2020 ME&O objectives and activities, describe key takeaways and provide data on topline metrics or KPIs in 2020 through Q3 2020.

Objective 1: Develop accessible outreach and promotional materials

Activities consisted of:

- **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

Narrative: This objective is complete for 2020, with marketing materials developed in Q3 2019 and reviewed and approved by the Energy Division in Q4 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, we modified outreach materials to make them easier to read and comprehend at a glance; this was particularly important for clearly separating the English and Spanish sections of key materials. In 2020, GRID also gathered "COVID-19 outreach testimonials," a collection of client stories, speaking to how solar has benefited them during the pandemic as well as how GRID has installed solar on client homes during the pandemic with extra safety precautions.

Objective 2: Conduct broad-based outreach to DACs statewide to meet a statewide installation target of 866 projects

Activities consisted of:

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

Narrative: Overall, GRID's outreach efforts for the DAC-SASH program statewide have resulted in a relatively stable pipeline of eligible projects from targeted communities. While GRID has not reached the plan's targeted 866 DAC-SASH projects for the year, we have installed 356 projects statewide through Q3 and expect to install roughly 140 more in Q4. Some marketing and outreach activities such as in-person canvassing or in-person participation in community events have been halted since March 2020. Because of public health considerations, we do not anticipate these activities taking place widely in 2021. GRID staff continues to attend remote community events, promote the program online, and encourages direct word of mouth. Considering pandemic induced slow-downs and restrictions, GRID considers the YTD results of 2020 aligned with best case outcomes and expects to continue installing at the same or a higher rate for the rest of the year and throughout 2021, assuming current COVID modifications remain in place.

Highlights of outreach marketing efforts and related KPIs through Q3 2020 include:

- Thousands of postcards and other mailers were sent to targeted lists in IOU territories. Some of the communities targeted were small cities in the North Valley and Bay Area, including San Francisco, Richmond, Tracy and Vallejo. From these postcards and mail campaigns, roughly 400 prescreens were completed through Q3. We also developed a new postcard in 2020 and will be assessing its results as we deploy it in targeted regions.
- Referrals through GRID's Referral Rewards Program continue to play a major role in successful outreach across the state, posting strong numbers with over 250 referral leads each quarter
- Utility partnership: SCE's partnership with GRID for co-marketing continues to be successful in supporting client acquisition and raising awareness about the program. SCE links to GRID's program on their website, on their CARE and Solar pages, driving substantial traffic to the program. SCE also collaborates with us on sending out co-branded mailers and, more recently, emails to targeted low-income CARE ratepayers. In the first three quarters of 2020, these efforts have generated many leads (potential clients expressing interest) for GRID and hundreds of installed projects. The SCE partnership has expanded GRID's acquisition funnel and proven vital for our Southern California offices.

- Leveraging city partnerships is an important marketing and outreach strategy that we continued in 2020. To fill in project funding gaps, GRID sometimes leverages additional funding from local jurisdictions. In 2020 we partnered with the City of Ontario to promote the DAC-SASH program alongside the Transformative Climate Communities (TCC) program. We are leveraging TCC funding in Fresno as well⁴ and in the Los Angeles region, the City of Paramount has included mention of the program on its website. In the Bay Area GRID continued its successful partnership with the City of Richmond, continued to work closely with the City of San Francisco municipal agencies and recently began partnering with the City of San Pablo. Over 450 leads applied from marketing efforts in these cities and of these, 160 were converted into installed projects or 35%.
- GRID also successfully leveraged CBO partnerships to drive interested leads to apply to the program. Through Q3, roughly 150 leads were prescreened for the program from CBO partners. GRID works closely with affordable housing developers such as Habitat for Humanity affiliates, Self-Help Enterprises and has received leads from CBOs across the state such as Proteus Inc, Stone Soup Fresno, and the Central Valley Opportunity Center.

Objective 3: Target Highest Need 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
- **3.3** Develop outreach partnerships with cities and CBOs through direct outreach and education

Narrative: High-needs communities are those that have been identified by the Commission and State as most in need of investment, many of which are also served by complementary programs and resources. Integrating these communities into the DAC-SASH ME&O plan helps support the Commission’s and State’s goals of program coordination and alignment. The high-needs communities that were identified as target areas for 2020 were:

1. San Joaquin Valley (SJV) communities that are part of a PUC proceeding focused on gas and electric access and affordability;

⁴ The Transformative Climate Communities (TCC) program was established by AB 2722 to “fund the development and implementation of neighborhood-level transformative climate community plans that include multiple, coordinated greenhouse gas emissions reduction projects.” It is funded by the state’s Cap and Trade program or the GGRF and its implementing agency is the Strategic Growth Council.

2. Communities or zip codes with the highest electrical service disconnection rates (due to customer non-payment) in each IOU and;
3. Communities that are part of the Community Air Protection Program (CAPP) set up by the CA Air Resources Board (CARB) in response to AB 617 (C. Garcia, 2017).

Of the 57 high-need communities identified by the CPUC, 27 of these are located in both IOUs and CES DACs and are thus geographically eligible for DAC-SASH, including:

- 10 of the San Joaquin Valley communities
- 7 highest disconnection zip codes
- 10 of the AB 617 communities

GRID sought to increase and, in some cases, establish an initial presence in these high-need communities in 2020. GRID executed at least one ME&O activity in 16 of the 27 geographically eligible communities. GRID pre-screened over 1,000 leads in these communities and of these, roughly 350 were qualified or waitlisted, and 20 have turned into planned or completed installations as of September 30th. Next, over 60 job trainees living in high-needs communities signed up to participate in on-site installations in Q1, prior to the COVID restrictions. In 2020, GRID increased its brand presence and provided solar education for homeowners and job trainees in high-need communities that it has not worked in previously, primarily through media outreach. An example of media outreach was a television program that reached an estimated 13,000+ viewers. Between that program and multiple news articles mentioning the program, GRID estimates that roughly 1 million online or print readers and viewers could have become aware of the program.

Highlights from 2020 ME&O activities, specific to each highest need category:

San Joaquin Valley communities: GRID focused its 2020 DAC-SASH outreach efforts in Ducor, La Vina, West Goshen, and central Goshen. In these four cities we carried out canvassing (prior to shelter in place orders) and offered referral rewards. Simultaneously, GRID is coordinating with the SJV pilot project, meeting with the IOUs and program implementers each quarter who are leading the SJV pilot and developing electrification projects. The SJV pilot projects officially launched in Q3 2020 and GRID has begun receiving occasional leads and customer information from its partners in this community.

High Disconnection rate communities: GRID has worked with partners in several of the zip codes with the highest disconnection rates to market DAC-SASH and address barriers to access through additional benefits. For example, in San Bernardino (92401 and 92404 zip codes), GRID is partnering with Neighborhood Partnership Housing Services Inc (NPHS) and the City of San

Bernardino for assistance with roof and other home repairs, in order to make homes solar-ready. The City of San Bernardino's HOME program⁵ is administered by NPHS and the program consists of a forgivable loan of up to \$40,000 that has no interest or payments.⁶ In Goshen (93227) and Porterville (93258), GRID is partnering with Richard Heath and Associates (RHA), the City of Arvin and Proteus and executed a referral campaign, put on virtual workshops, and completed targeted marketing.

Assembly Bill 617 communities: In nine cities GRID marketed, outreached, and built or deepened partnerships, including the following.

- With the City of Richmond, GRID sent 1,700 co-branded mailers and hosted a virtual workshop with over 20 attendees. The workshop was also promoted to qualified neighborhoods via the City's communication channels such as Next Door.
- In South Central Fresno, GRID canvassed and provided referral rewards in each quarter of 2020 and sought to leverage the TCC program incentive for gap financing.
- A SCE co-branded mailer was sent to residents in Carson, Long Beach and Lynwood.
- In National City and the Barrio Logan/Logan Heights/Sherman Heights area of San Diego, GRID participated in multiple events, posted Facebook ads, canvassed, sent postcards, and promoted our referral rewards.

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

Activities consisted of:

- **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

⁵ The HOME program is overseen by the U.S. Department of Housing and Urban Development (HUD) and grants states and local government funding to implement local housing strategies designed to increase homeownership and affordable housing opportunities for low and very low-income Americans.

⁶ The NPHS roof and home repair program provides loan forgiveness after 10 years if loan terms are met (i.e. still primary residence, home in good repair, not in foreclosure).

Narrative: With its client-centric approach, GRID outreach staff provided a fully supported process to DAC-SASH clients, from initial outreach through to installation and system interconnection. This approach has maximized the program's impact for our participants and remains true in 2020, despite COVID-19 limitations and remote outreach, education, and support. To date in 2020, over 1,000 leads were successfully prequalified for the program, which means that the homeowners sent all requested eligibility documentation to GRID for review. 37% of those that were prequalified submitted a complete application. Of the remaining 63% of the pre-qualified leads, almost 300 are still active and in the process of submitting an application and 336 were deactivated, with the most common reason for deactivation being a home that is not solar suitable due to an old or unsafe roof. The second, third and fourth most common reasons for eligible leads to be deactivated were code compliance or electric panel capacity issues, clients declining to participate, and clients being over the DAC-SASH income limit respectively.

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 thereafter, on an annual basis. Of the 84 Post-Installation Surveys completed through Q3, the average client rating on its educational questions (scale of 1-5) was 3.5, which exceeds our 2020 goal of >3. The average net promoter score (NPS) is 9.7 (scale of 1-10), exceeding our 2020 NPS goal of >6. 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, with 9 or 10 defined as "promoters", 7 to 8 are "neutral" and 6 or below are "detractors".

In 2020, roughly 30 DAC-SASH clients completed GRID's separate Annual Survey, sent on the anniversary date of the project's interconnection with the utility. GRID includes all client responses, complaints, and feedback in its [DAC-SASH semi-annual progress report](#). Overall, we are pleased with the high client satisfaction rates and would like to ensure continued strong outcomes with this metric. The average NPS score for the annual survey is 8.4 and the primary complaint was related to confusion that clients experience in receiving and/or understanding their Net Energy Metering annual true-up bill from the IOUs. For families struggling to make ends meet, an annual bill can create serious financial strain, even with the option to sign up for a payment plan. SCE provides a monthly option that considerably alleviates the financial burden of annual NEM bills on low income customers. Neither PG&E nor SDG&E offer a similar monthly option at this time.

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

Activities consisted of:

- **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

Narrative: In 2020, GRID provided DAC-SASH clients with direct education and resources about energy efficiency, including educational handouts with [tips and programs](#) via the GRID website. Through Q3, GRID tracked almost 300 unique pageviews of our energy efficiency educational webpage, with an average time spent on each page of roughly 3.5 minutes.

GRID also provided direct referrals to complementary programs, in particular 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 overall electric usage and monthly energy costs lower. Roughly 25% of the 620 DAC-SASH applicants that we referred to ESAP Q1 to Q3 2020 were reported back as enrolled by the IOUs. The California Alternate Rates for Energy (CARE) program had stronger uptake, where 74% of the DAC-SASH program applicants were cross-enrolled in the CARE program. The program gives IOU customers a 30% discount on their electric bill and a 20% discount on their natural gas bill. GRID provides DAC-SASH applicants information about ESAP, CARE and the Family Electric Rate Assistance Program (FERA) and is open to exploring mutually beneficial partnership opportunities with the IOUs to provide information about other programs or services in the future.

GRID believes that disadvantaged communities benefit from a holistic and streamlined outreach approach. We strive to connect DAC-SASH participants to all complementary programs that can further benefit them. Below are two more examples of such programs:

- GRID initiated a pilot in Q3 2020 to provide battery storage to households eligible for the [Self Generation Incentive Program \(SGIP\)](#) Equity Resiliency Budget. We hope to provide solar + storage to DAC-SASH clients if eligible for both programs in the future. In September 2020, GRID generated its first rebate reservation for the SGIP program and is hopeful that additional SGIP applications for battery storage systems will be approved for DAC-SASH clients by the end of 2020. A major hurdle to providing solar + storage to DAC-SASH clients is the lack of overlap between the DAC-SASH eligibility maps and the SGIP eligibility map. The programs also use different income limits. Unless DAC-SASH program modifications are addressed, we anticipate only a small number of our low-income clients receiving services under both programs.

- In 2020, several GRID clients took advantage of one of our Clean Mobility programs for electric vehicles (EV) or EV chargers. Through Q3, eleven DAC-SASH clients have benefited from a GRID-coordinated EV purchase. One client received an entirely free new electric vehicle thanks to a Bank of the West grant and the other ten clients received between \$5,000 and \$9,500 towards a plug-in car, depending on which incentive program they signed up for and what kind of vehicle was selected. Most programs include a \$2,000 add-on for residential, level-2 charging.

Objective 6: Recruit job training participants, with a focus on Job Training Organizations and job trainees in DACs

Activities and KPIs consisted of:

- **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

Narrative: In Q1 2020, GRID leveraged its community networks and job training organization (JTO) partnerships to engage thirteen residents of DACs in the program's installations and its training programs. This Q1 effort was successful and set GRID on a path to meet its 2020 goal of engaging 100 DAC residents. However, in mid-March our job trainee recruitment was paused, including an unprecedented cancellation of all in-person training due to COVID-19. In Q2 2020 GRID began piloting an online Google Classroom format for its Installation Basics Training (IBT) allowing us to engage with trainees virtually.

As outlined in the Introduction to this report, in Q2 GRID established policies and protocols for returning trainees to training in a mock environment. In-person cohorts are limited to a small number of trainees in order to maintain social distance; cohort capacity is determined by training space square footage. Strict safety requirements were put in place including wearing masks at all times, daily sanitizing (of physical spaces and tools), temperature checks, and a daily

contact tracing survey. Offices must also seek approval from their local municipality to ensure that in-person trainings do not violate local ordinances.

In 2020 each GRID office adapted its job training programming in a way that best suits their unique situation with respect to partner relationships, staff capacity, and local COVID health directives. *Trainings in Q2 and Q3 consisted of the following, as GRID began to adapt:*

- **Bay Area** - Job training programs remain suspended here as do those of most JTO partners in the region. Our Bay Area office has offered monthly webinars on solar topics to keep volunteers and trainees engaged and individual interns have participated in installation work in our North Coast satellite office in Willits.
- **Central Valley** - After offering some distance learning options in the early days of the pandemic, this region has seen the most success with returning to in-person instruction. This office built a mock training space, including mock roofs and house that trainees learn on. The first cohort returned to in-person training in late Q2. Three cohorts completed the 5-week IBT 200 program in-person by the end of Q3 and three more cohorts are planned for Q4 2020.
- **North Valley** - This office created GRID's online distance learning content and has completed five online training cohorts between Q2 and Q3. In Q4 the office will incorporate in-person lab training as well but with no installation participation.
- **Los Angeles** - This region introduced a hybrid cohort in Q3. The trainees do classroom lessons online and come to the office for hands on work in the training lab.
- **Inland Empire** - This region shifted one training cohort online at the beginning of the pandemic. The office had a thriving internship program pre-pandemic and has shifted interns from installations to remote efforts that support design, outreach, permitting and site visits. In Q4 the office will adopt North Valley's distance learning cohort model.

Trainee Participation: In Q1 2020, thirteen job trainees from DACs signed up to participate in a GRID installation (GRID's COVID policies prevented participation in Q2 and Q3 of 2020). In Q1 these trainees from DACs logged over 380 hours of participation on DAC-SASH installations.

Job Training Organizations: GRID has active formal or informal relationships with 50+ job training and community-based organizations in California, 27 of which are located in DACs. Since the program began, GRID has partnered directly with over half of those 50+ organizations to provide over 200 students with hands-on training on DAC-SASH installations. Of those hands-on partners, ten have offices located in a DAC. In Q1 2020, GRID engaged eleven JTOs who sent over forty students to DAC-SASH installations and one new DAC-located JTO partnership was established in North Valley. However, the new JTO has not been able to send its students to an install yet due to COVID. While regions are working to maintain JTO relationships

during the pandemic, no new partnerships have formed since we ceased job trainee and volunteer participation on installations.

Employers: In 2020, one Sub-contractor Partnership Program (SPP) subcontractor signed onto GRID's resume bank, which reflects the reduction in SPP program installations in 2020; the bulk of projects are being completed by GRID's "in-house" teams. YTD there are 55 active non-SPP employers on GRID's resume bank. Over 90 employers are subscribed to GRID's employer newsletter, 12 of whom signed up for our workforce development newsletter this year. This means that GRID is successfully engaging with employers but needs to do more in order to improve the quality of that engagement and translate this to trainee job placements.

Jobseekers: A virtual job fair took place at Solar Power International (SPI) on October 22, 2020. This was GRID's first virtual job fair and was held as part of the 2020 [SPI, ESI, North America Smart Energy Week Conference](#). Attendance was focused on employers and job seekers from Southern California, however attendees from across the state were encouraged to attend and over 25% of job seekers hailed from DACs. Next, through Q3 2020 there have been 15 jobs posted to GRID's jobs board and 25 since the program began (not from companies exclusively located in DACs). Through Q3, six individuals located in a DAC signed-up for GRID's resume bank, there were over 270 job board views, and one trainee reported longer term employment. As of the program's July progress report, GRID estimates that 111 DAC-SASH job trainees or volunteer participants have secured longer-term paid employment after working on a DAC-SASH project, with 78 of those placements taking place in 2020 despite the slowdown in GRID's job training services.

As the State works to recover from the pandemic, the DAC-SASH workforce development requirements can play a role in training individuals seeking employment. GRID will aim to positively contribute to the rebuilding efforts post-COVID.

Objective 7: Keep stakeholders informed about program impact

Activities consisted of:

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

Narrative: 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. Before launching the program in early 2019, GRID hosted an educational DAC-SASH webinar presentation. Then, in December of 2019, GRID hosted a public webinar and sought stakeholder input and engagement regarding its Petition to Modify (PFM) the program that was submitted in April 2020. This webinar was hosted on December 10, 2019 and was attended by 25 individuals, including six city or county stakeholders from all over the state and seven tribal representatives. Simultaneously, throughout late 2019 and early 2020, GRID reached out to cities, counties, tribes, non-profits, rural organizations, CCAs and others in order to educate and gain support for the PFM in the form of signed support letters. Ultimately GRID received 46 letters of support, including from past or current SASH or DAC-SASH program participants.

In 2020 GRID helped set-up data reporting on California Distributed Generation Statistics, a public website where stakeholders can find out more about the DAC-SASH program's interconnections around the state, including location and other relevant data. GRID also published the program's semi-annual progress reports in January and July of 2020, which are posted to GRID's [website](#) as well as to the Energy Division's program webpage. Finally, in August 2020 GRID submitted detailed data on the program's impact, marketing and outreach efforts, and lead conversion rates in SDG&E territory, at the Energy Division's request.

In 2020 GRID engaged stakeholders through community engagement, program education, and the CPUC regulatory process as well. We submitted one Advice Letter related to COVID adaptations and several memos to the CPUC. Next, the program page on GRID's website received over 1,700 pageviews YTD, demonstrating strong interest in the program. Program-specific storytelling in 2020 consisted of three blogs posts and three social media posts with over 2,700 views and 70 engagements. The DAC-SASH program was mentioned more broadly in several other mediums in 2020, which highlight its successes.

III. 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 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 a 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% in 2020 – with much higher drop-out rates in urban areas with older housing stock. As GRID implements the DAC-SASH program, experience is showing that disadvantaged communities often have more structural barriers than non-DAC areas, often because homeowners in these areas are financially challenged to properly maintain their homes.

Tribal communities

GRID has worked with tribal communities across California to promote the SASH program in the past and is now beginning to promote the DAC-SASH program as well 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. In 2021 and beyond, GRID will work to promote the DAC-SASH program to newly eligible tribal communities, however currently GRID has no TPO or third-party financing for Tribal projects to supplement the program incentive. This makes fully funding the

projects more challenging and so in 2021 GRID will work with its TPO partner(s) to determine if it is possible to include tribal projects in its TPO model in the future. In the meantime, some GRID regions will apply for Department of Energy federal grants as well as other grant programs that may be available in order to help make up the financing gap for DAC-SASH tribal projects.

Per the D. 20-12-003, California Indian Country where projects will be eligible is defined as:
"All California Indian Country as defined in 18 United States Code Section 1151, with the exception of privately held in-holdings, which are defined as non-Indian owned fee land located within the exterior boundaries of California Indian Country; in the event of multiple owners, such land shall be considered Indian owned if at least one owner is a tribe or tribal member, regardless of the use of the land."⁷

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 (particularly prescient during the pandemic when much of GRID's programming shifted to distance learning), 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 party and channel they trust and needs support to address individual 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, various Community-Based Organizations (CBOs) around the state, utility ratepayers, Community Choice Aggregators (CCAs), and residents of DACs across the state. This audience seeks access to data, information about program progress and impact, and mechanisms to provide program input and feedback.

⁷ D.20-12-003, pg. 7

IV. Strategic Approach

Holistic Approach with Focus on Trust-Building

GRID's holistic community and customer-centric approach addresses marketing, education and outreach barriers using strategies that have proven to be successful working with low-income households. Much of GRID's expertise was developed over the last decade administering the SASH program throughout California. 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" as a SASH program evaluation report noted.⁸ Educational messages are reinforced by a robust referrals program and accessible digital resources and platforms.

Once a client has been approved for participation, they receive dedicated, ongoing 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, and FERA. Following installation, GRID and its Third-Party (TPO) partners provides 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 Direct Mail, Word-of-Mouth, and Partner-Based Marketing

In 2021 GRID will increase its direct mail budget and increasingly focus on this outreach activity. This will be especially important given social distancing, which makes other forms of outreach such as canvassing and event participation more difficult or impossible in some cases. In 2021 we will also continue to focus on word-of-mouth as a highly effective marketing tool, coupling an on-the-ground presence with enhanced partnership-based marketing. GRID has found that partnering with a trusted community organization on marketing helps address challenges with client trust. Not only does working with trusted CBOs, community leaders, local agencies and other service providers helps overcome trust and education barriers, it can help 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.

⁸ Market and Program Administrator Assessment (PY 2011-2013), p.53

Financial Tools for Gap Financing in DACs

GRID's nonprofit status enables us 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 state and local funding streams to help address structural barriers such as roof condition and the need for electrical upgrades. This increases the applicant pool and ensures that clients at the lowest income can participate in the DAC-SASH program. GRID will continue to make this a major focus in 2021. However, as described in this plan's COVID Impacts section, GRID continues to face barriers to obtaining additional project financing in the current environment. This includes reduced revenue generation from philanthropy, limits on lines of credit, and an overall reduction in additional financial resources to cover financing gaps.

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. GRID has engaged with the administrators of the Self-Generation Incentive Program (SGIP) to help determine program eligibility processes and is coordinating with the IOU's CARE/FERA and ESAP program contacts on referrals and high-usage CARE data transmission to GRID.

This alignment effort has become particularly relevant to client education about time-of-use (TOU) rates and to enrollment in complementary programs such as ESAP and CARE. Because current Net Energy Metering (NEM) rules require DAC-SASH clients to move to a TOU rate, GRID is working to provide more education about TOU and will leverage the IOUs' informational materials on TOU where available and appropriate. GRID has observed that 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 high-cost times of day.

V. Installation Targets in 2021 and Potential Challenges

In 2021 GRID estimates lower project volume compared to our 2020 initial projections, primarily due to the slowdown caused by COVID-19 and because GRID will also be focused on installing for the SASH program in SCE’s utility territory, in order to reserve remaining incentive dollars before the SASH deadline of December 31, 2021. The 2021 SDG&E installation target is several times lower than in 2020 due to the proven difficulty finding qualified or eligible homeowners in San Diego and this takes into consideration the new inclusion of tribes into the program 2021.

Installation Targets in 2021 and Beyond

Table 2 below details the incentives spent and installed projects through Q3 2020 and the estimated number of projects by IOU and estimated capacity for the rest of the program’s life through 2030. This is based on the DAC-SASH program budget and experience in 2019 and 2020 marketing, outreach, and installing in DACs statewide.

Table 2: Incentive Funding and Installations, 2019-2030

	Incentives Claimed	Installed Projects	Installed Capacity ⁹	Total Incentive Funding	Incentives Remaining	Remaining Estimated Capacity ¹⁰
	Through Q3 2020			2019 - 2030	Through Q3, 2020	
PG&E	\$4,473,060	415	1.49	\$44,574,000	\$40,100,940	13.4
SCE	\$2,168,238	195	0.72	\$46,920,000	\$44,751,762	14.9
SDG&E	\$138,504	15	0.05	\$10,506,000	\$10,367,496	3.5
Total	\$6,779,802	625	2.26	\$102,000,000	\$95,220,198	31.7

Table 3 below illustrates GRID’s expected installations in 2021. GRID highlights the low project count in SDG&E projected for 2021, which would utilize only a percentage of the annual incentive funding in that utility territory. This is due to the resources needed to identify eligible

⁹ In megawatts (MW) CEC-AC

¹⁰ Ibid

homes in the service territory, as further detailed in the following “Proven Limitations of Program Eligibility Requirements in SDG&E territory” section.

Table 3: 2021 Installation Targets for DAC-SASH

	Estimated Incentives	Average System size kW, CEC-AC¹	Estimated # of Installations
PG&E	\$3,845,162	3.77	350
SCE ²	\$1,682,997	3.73	165
SDG&E	\$178,000	3.35	20
Total	\$5,706,159		535

¹The average system size is calculated based on GRID’s single-family installations in each IOU service territory in 2019 and 2020. ²Greater Los Angeles, Central Valley, and Inland Empire regions will also install for the SASH program in 2021, so SCE offices’ DAC-SASH volume may be lower in 2021 as the SASH program draws to a close.

Geographic Scope in 2021

Map 1 below shows the location of GRID’s regional offices, IOU territories, and DAC-SASH applications by county. 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. From Q1 to Q3 2020, GRID received and approved over 500 applications from eligible DAC-SASH households, with the majority of approved DAC-SASH applications located in PG&E and SCE service territories. GRID will expand its 2021 focus to tribal lands and communities, in line with Decision 20-12-003. It plans to install up to 70 tribal DAC-SASH projects in 2021 as it rebuilds its tribal partnerships around the state.

GRID will also continue to leverage its existing partnerships in communities where it has established a presence, and continue to expand operations to new communities including those that have been identified by the State and Commission as highest-need. These consist of communities in the San Joaquin Valley pilot area, zip codes of highest electric service disconnection in each IOU territory, and Assembly Bill (AB) 617 communities (as detailed in Section VI, “Program Objectives in 2021”).

328 did not qualify primarily due to income limitations, not being located in a DAC, or not owning the home.

- Through Q3, there were 18 projects total in the pipeline from program Years 1 and 2
 - 12 projects installed in 2020 and 3 installed in 2019, and \$138,500 in incentives claimed
 - 3 reserved incentives, with projects waiting to be installed
 - 0 applications under review
- Less than 10% of the Year 1 + 2 Incentive funding has been encumbered to date

The almost exclusive use of the CES to set the parameters for DACs has created significant challenges for client recruitment in SDG&E's service territory due to the size of the potential market. This may continue to be true in 2021 and beyond. In SDG&E, only 37 census tracts are in the CES compared to 356 in PG&E and 655 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.

In addition to these geographic limitations, the statewide income limits further restrict participation in San Diego, where the cost-of-living is higher than in less urban areas. Nearly 50% of SDG&E households who participated in SASH (which uses Area Median Income for program eligibility) would not meet the income requirement for DAC-SASH. 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 statewide 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.¹¹

GRID's PFM of Decision 18-06-027 resulted in Decision 20-12-003 in December 2021. The Decision's directives will hopefully provide a lifeline to the program in SDG&E territory as GRID can begin outreaching to tribal lands in the greater San Diego area since tribal lands are now eligible per the new Decision. However, more program changes may still be needed in the future, in order to find sufficient eligible participants in the utility territory.

¹¹ 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.

VI. Program Objectives in 2021

Goals for Marketing, Education and Outreach

The DAC-SASH ME&O plan delineates activities and objectives for 2021, which we expect to be significantly affected by the pandemic and continuing restrictions. Within the health and safety restrictions brought on by the pandemic, our ME&O goals are to work on building a robust applicant pipeline with projects and clients representing the diversity of California's population and geography, and to ensure a positive client experience that builds recognition of and trust in the program. In 2021, GRID will focus on refining remote outreach approaches, to ensure that the program can reach those who have digital barriers or no internet access.

The program's 2021 ME&O Objectives are:

1. Assess outreach & promotional materials, especially given enhanced remote and digital outreach required in 2021
2. Conduct outreach to DACs statewide to meet an installation target of 535 projects
3. Continue outreaching to highest-need communities
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 job trainees in DACs
7. Keep stakeholders informed about program impact and COVID-19 impacts

Objective 1: Assess outreach & promotional materials, especially given enhanced remote and digital outreach required in 2021

Due to COVID-19 and the need to shift to remote outreach, GRID will continue to assess the promotional materials developed for DAC-SASH and identify opportunities for improvement or changes to be better positioned for remote outreach in 2021. This assessment will take place as we receive feedback from program participants and partners, and as clients' needs evolve. We are currently testing a postcard and will likely debut other remote-friendly promotional materials in 2021. We expect that providing services remotely will be necessary throughout 2021, and potentially longer due to the pandemic.

Objective 2: Conduct outreach to DACs statewide to meet an install target of 535 projects

GRID will continue to identify and outreach to qualified leads in DAC communities statewide. Given the pandemic challenges and the lessons learned from the first full year of implementing the program, our installation target for 2021 is 535 installations. Success in reaching this goal will hinge on the evolution of COVID restrictions, lessons learned in 2020 conducting remote outreach, as well as our years of outreach experience as administrator of the SASH program. GRID will conduct outreach to households and job trainees throughout DACs, employing a combination of direct and indirect outreach by GRID's multicultural and multilingual staff, partner-based outreach, and will be aligned with other statewide ME&O efforts as required. We will continue to rely on key partners – municipalities, IOUs, and CBOs – and referral reward programs to promote DAC-SASH to qualified clients.

Due to continued uncertainty in a COVID-impacted environment, GRID will need to be flexible and nimble in order to adapt to shifting needs. In 2021 we must assess, pivot and modify processes, which may slow down normal operations as it did in 2020.

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 in 2021 include:

- Remote and digital outreach: In 2021, GRID will continue to pivot to remote outreach and leverage successes in digital outreach. Some of the planned strategies include focusing on more phone calls and check-ins to warm leads as well as identifying which households are comfortable using email for correspondence.
- Virtual 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 trusted 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 in 2021 will be limited and only used if great opportunities arise.
- Earned media – The use of this tool will be limited in 2021 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. Channels for local engagement include Facebook and LinkedIn (primarily for job training) and in 2021 GRID will focus primarily on COVID-themed content, reminders or announcements.
- Referral Rewards program – In 2021 we will continue to market our \$200 Referral Rewards Program¹² (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 and will continue the strategy in 2021. Other efforts will include email marketing, promoting the referral program via handouts and word-of-mouth.

Partner-based Outreach

- City partnerships – Marketing and outreach efforts in partnership with cities or municipalities will be a continued focus in 2021. Each partnership is unique and tailored and may include co-branded mailers, community workshops, virtual or socially-distanced 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 2021. Examples of GRID CBO partners include Self-Help Enterprises, Inc., Habitat for Humanity, Stone Soup Fresno, Rising Sun, and the Community Housing Improvement Program. Partner activities may include direct referrals, distributing marketing collateral, sending emails, social media promotion, and including us in virtual events.
- Co-marketing with IOUs – In 2019 and 2020, GRID successfully collaborated with SCE's Customer Programs & Services department to promote the SASH and DAC-SASH

¹² 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.

programs. SCE sent co-branded marketing 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 meaningful and steady collaborator for two years and the partnership has been instrumental in raising awareness of the SASH and DAC-SASH programs and garnering leads. We will continue this SCE marketing partnership into 2021 and are hopeful the other IOUs will follow SCE's example.

Below is a matrix summarizing planned outreach activities related to Objective 2 in 2021.

Matrix 2: Outreach to DACs statewide, refining remote 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)
Promote referral rewards: -Direct mail marketing -Email marketing -Direct requests	Print collateral Email Phone	Homeowners in DACs	GRID clients and partners refer others; Homeowners get pre-screened	# prescreens completed where lead is identified as referral
Leverage City partnerships to promote the program	Print collateral, direct mail & communication channels (like email), events	Homeowners in DACs	City partners promote program to residents; Homeowner gets pre-screened	# of city partnerships; # prescreens completed in target city during promotion period

Leverage CBO partnerships to promote the program	Print collateral, email, social media, events	Homeowners in DACs	CBO partners market the program to their networks.	# and # prescreens completed where lead is identified as CBO partner
Participate in community events	Remote events only and digital collateral or "handouts"	Homeowners and job seekers in DACs	Homeowner and job seekers provide contact info	# leads (trainee and homeowner) entered into Salesforce where Lead Source = Event

Objective 3: Continue Outreaching to Highest-Need communities

GRID will build on its 2020 progress in highest-need communities (identified by the Commission and the State as those in most need of investment) and conduct targeted outreach using the strategies outlined for ME&O Objective 2. For areas where GRID has an established presence, we aim to qualify households and recruit job trainees and conduct some installations in 2021. We will continue to build partnerships to promote the DAC-SASH program and lay the groundwork for client acquisition in new communities, focusing on successful outreach strategy and tactics outlined throughout this plan. Below we describe how we will pivot or continue our outreach in these communities in 2021.

The high-need community categories listed below, have been identified by the Commission and state as cities or zip codes in need of enhanced services and programs, including access to DAC-SASH. There are 27 high-need communities that are located in IOUs and CES DACs, that are therefore geographically eligible for DAC-SASH. The three community categories are:

- San Joaquin Valley (SJV) communities that are part of a PUC proceeding focused on gas and electric access and affordability;
- Communities with the highest electrical service disconnection rates (due to customer non-payment) in each IOU and;

- Communities that are part of the Community Air Protection Program (CAPP) set up by CARB

San Joaquin Valley (SJV) Pilot Communities - Ten of the San Joaquin Valley cities are located in IOUs and CES DACs and so are geographically eligible for DAC-SASH. Solar-suitable homes are limited in many of these communities and the rate of homeownership is low, therefore in 2021 GRID will focus on areas where it identified solar suitable homes in 2020 and where gap financing is available. Due to these constraints, we plan to continue focusing on the same three cities as in 2020, namely Ducor, La Vina and West Goshen. GRID will also continue coordination with the IOUs and administrators of the SJV pilot programs, such as Richard Heath and Associates (RHA), to ensure community members receive information about the DAC-SASH program through pilot project's outreach efforts.

High Disconnection Rate Communities - Of the ten highest disconnection zip codes, seven zip codes are located in a DAC.¹³ Areas such as West Hollywood, Bakersfield, Benton, Bryn Mawr or Oro Grande are not eligible or have insufficient funding and therefore GRID will not promote the DAC-SASH program to these communities. In 2021, we will continue to partner with those entities we found most helpful in select zip codes and build on 2020 successes. Examples of successful partnerships in 2020 include the Neighborhood Partnership Housing Services Inc (NPHS) in the City of San Bernardino to provide roof repairs and working with Proteus and the City of Arvin to reach high disconnection rate communities in SCE territory more generally.

Assembly Bill (AB) 617 Communities - GRID will build on 2020 successes in target AB 617 communities. For example, GRID has built a strong partnership with the City of Richmond and been successful promoting the DAC-SASH program in partnership with that city. To address construction barriers, Richmond and GRID are working to promote a roofing program and identifying opportunities to provide additional services such as EVs and EV chargers to residents. In South Central Fresno, GRID has secured Transformative Climate Communities (TCC) funding to supplement the DAC-SASH incentive and will continue to focus outreach in that area. Similarly, the City of San Diego has awarded CDBG funding to GRID to address roof and home repairs to reduce barriers to solar access in the Barrio Logan/Logan Heights/Sherman Heights neighborhoods. However, GRID's experience working in these San Diego neighborhoods indicates low rates of homeownership and due to high rates of unpermitted structures and

¹³ Most disconnections were halted due to the pandemic, so the 10 zip codes have not been updated since we submitted our last ME&O plan in late 2019.

limited eligibility in SDG&E territory, the additional CDBG funding may not be sufficient to serve these areas with DAC-SASH projects. Other areas such as Wilmington, Boyle Heights and Shafter are not eligible or have insufficient funding and therefore GRID will not promote the DAC-SASH program.

Limitations to serving these communities - As GRID noted in its 2020 ME&O plan, the annual nature of the program’s incentive budget limits ME&O potential in these high-need communities. DAC-SASH funding is especially limited in PG&E territory compared to demand and is therefore a major 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. So as some of the examples above highlight, by necessity GRID must operate DAC-SASH in areas where additional funding resources have been identified, such as funding from the TCC program. GRID applied this financing source in 2020 along with additional private or municipal/county resources where available, to address financing gaps and barriers to solar such as old roofs or electric service panel upgrades. In 2021, GRID will continue to utilize TCC funding combined with DAC-SASH incentives in the Inland Empire and San Joaquin Valley.

Below is a summary of activities GRID will pursue in 2021 to acquire clients and deepen partnerships in California’s highest-need 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		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 process for clients from initial outreach to installation and beyond, limiting applicant drop-outs where possible and maximizing impact for participants. Key elements in 2021 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 successfully pre-qualified are connected directly to our 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 (albeit primarily virtual due to the pandemic at this time) 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.

Focus on Program Access due to the Digital Divide – COVID-19 has amplified the digital divide that exists in DAC communities, as some of the communities served by GRID are those with the least access to technology. 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. While these technological barriers are not new, the magnitude of the digital divide has been amplified by the pandemic and risks excluding some of our most vulnerable target communities. Therefore in 2021, GRID will go above and beyond to mitigate technological barriers and ensure equitable access to the DAC-SASH program while following COVID directives and requirements.

Client Feedback – GRID takes both a quantitative and qualitative approach to the DAC-SASH program. 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 Score, comments and feedback on the program that can help identify opportunities for improvement and deepen program impacts. Survey results are presented in the program's Semi-annual progress reports to the CPUC and here in the annual ME&O plan as well.

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 in 2021, to streamline service calls or maintenance questions. In 2021 GRID’s CRM will help streamline this ongoing support, because in 2020 we implemented a new and improved system for logging and tracking all service calls. 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.

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

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 in 2021	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.
Send clients annual survey assessing long-term program satisfaction	Email	Clients	Clients complete the survey	Survey average rating; Net Promoter Score > 6

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 2021 GRID will strive to increasingly include energy storage, electric vehicle (EV), EV charger services and/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 and 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

Clean Mobility Programs - In 2021 it will be a goal to serve DAC-SASH clients with clean mobility or EV charger services offered by GRID that they are eligible for. GRID currently administers a low-income EV program for the CA Air Resources Board and another program for the Bay Area Air Quality Management District. GRID is working to ensure that DAC-SASH participants receive accurate information about and are referred to EV programs that can help families access another cost-saving technology. GRID will continue to finetune its internal processes to facilitate referrals between programs and logistics coordination. To date, eleven GRID clients have been able to participate in both DAC-SASH and one of the EV programs. We hope to expand layered offerings when eligibility aligns, to make EVs and EV infrastructure affordable and accessible to DAC homeowners.

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 has been working with the SGIP Program's Administrators to share information related to SASH qualification, low-income eligibility determination, and SASH/DAC-SASH reservation documentation to help support a more streamlined SGIP enrollment processes for low-income participants. GRID is working with its primary TPO partner, Sunrun, to also explore integrating battery storage into its PV-model and to ensure the storage systems can be delivered to the households at no cost and that long-term warranty coverage and battery replacement are included. In 2021 GRID hopes to explore co-marketing with the SGIP Program Administrators, if SGIP ERB funding is still available at that time. The biggest hurdles to providing battery storage to existing and future DAC-SASH participants is the minimal overlap in eligibility between the two programs. Indeed, the DAC-SASH program's eligibility maps and the SGIP ERB eligibility map are almost the inverse of each other. Additionally, the two programs use different qualifying income limits. To provide the benefits of both programs to DACs would require changes to the program's geographic and income limits (GRID outlined some of these changes in its April 2020 Petition for Modification of D.18-06-027). For these reasons we anticipate a small number of DAC-SASH clients receiving services under both programs in 2021.

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 meets 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.

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 webpage views, time spent on pages
Refer clients to IOU energy assistance programs	In-person/print collateral/email	Homeowners in DACs	Clients sign up for assistance programs	# of participating homeowners referred to CARE or FERA and ESA and % that receive ESA services

Objective 6: Recruit job training participants, with a focus on Job Training Organizations and 50 trainees in DACs

As the State continues to adapt to the pandemic and recover, the DAC-SASH training requirement can play a crucial role in training individuals who seek resilient employment. GRID aims to continue as much of its valuable workforce development and trainee recruitment as can be safely executed in 2021. 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 virtual distance learning which is a COVID-19 substitution for hands-on learning (expected to continue through most of 2021).

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. While these channels will be impacted by the pandemic, some word-of-mouth is still expected to drive trainee recruitment in 2021.

Job training organization (JTO) Partnerships

GRID has active partnerships with 50+ job training organizations and community colleges throughout California, 27 of which are located in or serve residents of DACs. GRID will continue to work with these JTOs to provide training in whatever format possible to their current students and recruit their graduates into additional post-program training opportunities. We will leverage existing partnerships to engage DAC residents in GRID training and seek to develop new ones.

Subcontractor Program

GRID will support contractors participating in its subcontractor partnership program (SPP) in hiring trainees from DACs by making our trainee database available to them via GRID Alternatives' Resume Bank and Job Board and directly referring candidates when possible. GRID notes that its projected 2021 SPP installation volume is lower than in prior years and this will decrease the potential for paid job training opportunities created through the program; instead GRID will focus primarily on in-house job training and placements. In 2021 we expect to have roughly 65 SPP projects in the Inland Empire region.

Employment connections

GRID will use its network of solar industry employers to connect trainees from DACs with solar jobs. In addition to the Resume Bank and Job Board, GRID will produce an employer-facing newsletter and host and participate in virtual job fairs where possible.

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 presentations/ events	Job training organizations	JTOs partner with GRID to provide training to their students	# of new JTO partners

<p>Promote resume bank and job board as way to access paid work opportunities</p>	<p>Email, website</p>	<p>Job trainees from DACs</p>	<p>Trainee adds resume to Resume Bank; Trainee uses Job Board</p>	<p># of job seekers from DACs signed up for resume bank; # of visits to job board</p>
<p>Engage employers to hire trainees through our resume bank, job board and employer email newsletter</p>	<p>Online</p>	<p>Solar companies</p>	<p>Employers sign up for resume bank and job board account; Employers use resume bank and job board; Employers sign up for and open newsletter</p>	<p># of employers who sign up; # jobs posted; # subscribers to employer email newsletter; open rate of email newsletter</p>
<p>Increase % of job trainees on a DAC-SASH project who move to longer-term employment as a result</p>		<p>Job trainees from DACs</p>	<p>Job trainee gains full-time employment in solar industry after working on DAC-SASH project</p>	<p># of job trainees who receive longer-term employment after their DAC-SASH experience</p>
<p>Invite trainees from JTOs to participate in virtual job fairs held by GRID and partners</p>	<p>Online, email</p>	<p>Job trainees in DACs; Job training organizations</p>	<p>Trainees sign up for job fair</p>	<p># of trainees from JTOs located in DACs who attend job fairs GRID invites them to.</p>

Objective 7: Keep stakeholders informed about program and COVID impacts

In 2021 GRID will continue actively informing stakeholders about the program’s success and challenges. It will do so through a broad effort centered around community engagement, education, and the CPUC regulatory process.

Below is a summary of 2021 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

VII. Evaluation

GRID employs an active feedback/evaluation/modification process in its role overseeing statewide ME&O to ensure that DAC-SASH provides maximum community and stakeholder benefit. GRID submits to the Energy Division an annual ME&O plan in December of each program year and modifies the plan's strategies based on results from an assessment of the plan's performance metrics or KPIs, successes, and challenges. We will continue to collaborate with the Energy Division and other stakeholders, publishing assessments and implementing modifications to the program's ME&O strategies and activities. GRID also actively monitors data and surveys clients throughout the project process to understand barriers to entry, reasons for dropouts, and client satisfaction with the services provided. Client feedback is included in ME&O reporting as well as in the twice per year program progress reports. Finally, the DAC-SASH program is formally evaluated by an independent, third-party contracted by the CPUC every three years beginning in 2021. GRID expects that this comprehensive program evaluation will also assess the success of ME&O efforts and recommend any program modifications.

Data Collection - Since the program launch in September 2019, GRID has begun collecting data on key performance indicators (KPIs) and metrics outlined in the program's first ME&O Plan in order to create a program baseline. Key KPI outcomes have been highlighted in the "In Review" section of this plan. In 2021 we will continue to track and sometimes re-evaluate KPIs across ME&O objectives, determining where there are information gaps and gaining more insight on the program's progress and areas in need of improvement or attention.

Stakeholder Engagement - GRID will continue to engage a broad group of stakeholders and community members in the program, as it did in 2020 when submitting Advice Letters or its Petition to Modify. GRID may engage with the CPUC/CEC Disadvantaged Communities Advisory Group (DAC-AG) to gather input on the program and opportunities for improvement. A robust feedback loop helps empower GRID to modify its ME&O strategies and ensure its approach is successful in the communities it is designed to serve.

Appendix A: 2021 ME&O Budget

In Appendix A, GRID includes a budget for program activities for 2021 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 ~\$62,000 of the \$400,000 M&O budget to non-labor costs and will allocate the remaining \$338,000 toward labor costs for outreach staff. GRID will apply its own fundraising dollars and other resources to cover additional ME&O costs that will not be recouped from this DAC-SASH 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 2021 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 in 2021 as needed

Disadvantaged Communities – Single-Family Solar Homes Program

2021 ME&O Plan



		DAC-SASH 2021 ME&O Plan Budget (Forecast)									
		Q1 2021		Q2 2021		Q3 2021		Q4 2021		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		\$ 3,500		\$ 3,500		\$ 3,500		\$ 3,500		\$ 14,000
	Photography								\$ 5,000	\$ -	\$ 5,000
	Graphic Design									\$ -	\$ -
	Printing		\$ 6,000		\$ 6,000		\$ 6,000		\$ 1,000	\$ -	\$ 19,000
	Communications Coordinator (~5% FTE)	\$ 1,562		\$ 1,612		\$ 1,612		\$ 1,514		\$ 6,300	
	Director, Outreach Marketing (~5-15% FTE)	\$ 7,231		\$ 7,465		\$ 7,465		\$ 7,000		\$ 29,161	
	Regional Outreach Manager (~2-5% FTE)	\$ 2,165		\$ 2,234		\$ 2,234		\$ 838		\$ 7,471	

	Regional Outreach Coordinator (~10-15% FTE)	\$ 5,423		\$ 5,598		\$ 5,598		\$ 5,248		\$ 21,867	
	Director, Marketing (~5% FTE)	\$ 2,768		\$ 2,857		\$ 2,857		\$ 2,678		\$ 11,160	
DAC SASH M&001 - Community-Based Organizations (CBOs)	CBO Contracts		\$ 5,000		\$ 5,000		\$ 5,000		\$ 5,000		\$ 20,000
	Regional Outreach Manager (~10% FTE)	\$ 4,330		\$ 4,470		\$ 4,470		\$ 4,190		\$ 17,460	
	Director, Outreach Marketing (~2-3% FTE)	\$ 1,446		\$ 1,493		\$ 1,493		\$ 1,400		\$ 5,832	
DAC SASH M&003 - Client Acquisition & Support	Regional Outreach Coordinator (~1.5 FTE)	\$ 57,586		\$ 58,968		\$ 59,904		\$ 56,160		\$ 232,618	
	Regional Outreach Manager (~2-5% FTE)	\$ 2,165		\$ 2,234		\$ 894		\$ 838		\$ 6,131	
Totals		\$84,676	\$15,500	\$86,931	\$15,500	\$86,527	\$15,500	\$79,866	\$15,500	\$338,000	\$62,000

Total Labor \$ 338,000

Total Non-Labor \$ 62,000

Grand Total \$ 400,000

Appendix B: How GRID intends to use new IOU data or targeted leads in 2021¹⁴

Overview - In response to GRID's Petition to Modify submitted in April 2020, D.20-12-003 was published by the CPUC in December 2020. This Decision mandated that each investor-owned-utility (IOU) share CARE and ESA program customer profiles and usage data based on the fields listed in Appendix A of the Decision. This data sharing was directed by the CPUC with the intention of helping enable "a more targeted approach to customer acquisition, which makes better use of limited marketing and outreach funds than a more generalized approach."¹⁵

In February 2021, GRID received data files from each IOU and in the remainder of 2021 GRID will use the customer profiles received to conduct marketing in a targeted manner, to hopefully qualify and/or install more clients than we otherwise would have. As GRID has highlighted in the past, access to this data may prove helpful in marketing the DAC-SASH program, yet a more or equally effective effort that is proven to yield results is co-marketing directly with the utility, as SCE has done on a voluntary basis. GRID will explore co-marketing further with PG&E, a conversation that it started in 2020.

Data summary by IOU - From SDG&E, GRID received over 4,200 customer profiles which need to be screened for customers who already have solar or NEM billing. In SDG&E territory GRID has installed over 1,060 solar systems to date with SASH 1.0 or SASH 2.0 incentives, some of which may be included in the data received. Still, we are hopeful that this data will prove helpful in identifying more eligible clients in the remainder of 2021. Of these customers, 4,050 are CARE participants and 320 have been enrolled in the ESA program as well. In terms of usage, 2,600 of the profiles shared have annual usage over 3,000kWh, which makes them better candidates for DAC-SASH.¹⁶

From PG&E, GRID received 11,150 customer profiles that do not have NEM billing already. Of these, roughly 1,500 are located in and around Bay Area counties, which is where GRID has struggled to find eligible clients for the DAC-SASH program, due to the program's federal

¹⁴ Appendix B was submitted on March 15, 2021 as required in D.20-12-003

¹⁵ Decision 20-12-003, page 8

¹⁶ Customers using less than 3,000 annual kWh do not use enough energy to qualify for a 2kW DC system size, the system size floor for GRID's current third-party-owned (TPO) partner. This makes the project less feasible unless additional gap financing is identified.

income limits that do not take into account the high cost of living in the area. Of these 1,500 customer profiles, almost 400 have usage that is likely too low to qualify for the program's TPO gap financing and thus are not likely to move forward. This leaves roughly 1,160 leads in and around Bay Area counties that might qualify for the program if income at verification is eligible and no major construction barriers are identified.

From SCE, GRID received an impressive 214,000 customer profiles that do not already have solar. These profiles may prove especially helpful in high cost of living areas such as in Los Angeles County where GRID received over 100,000 customer profiles and in Orange County where GRID received almost 15,000 profiles who might qualify for the program upon verification.

2021 Updated ME&O Strategy - GRID outreach staff will use the customer data provided by each IOU to directly market to the new leads. GRID is hopeful that the additional data will help us more easily identify homeowners who qualify for DAC-SASH. GRID intends to first outreach to leads in target regions with lower program participation, such as in Greater San Diego and the Bay Area. In these areas, GRID will prioritize customer profiles with sufficient usage to also qualify them for the program's TPO financing and will continue to qualify clients based on the readiness of their home and roof for solar installation. Code or roof issues are a significant program barrier, particularly in certain regions of California where the housing stock is quite old. GRID verifies income based on applicants' most recent tax return, so it will not be surprising if some leads are not converted if CARE or ESA clients' self-reported income is higher than what GRID verifies on tax return documents. Finally, SDG&E's data does not flag which customers have NEM billing, so there may be customers included that already have solar.

New fields to consider adding in 2022, in order of importance:

- Flag NEM billing
- Flag customers with recent disconnections (one of the Highest Need communities)
- CARE program enrollment date (in addition to ESAP enrollment date)

2021 Updated ME&O Activities - In Q1 2021, GRID has worked closely with IOU's Energy Savings Assistance program (ESAP) leads to better coordinate ESAP referrals and their outreach efforts. GRID has made progress in ensuring that its monthly referrals or leads to IOUs are actively followed-up on once received, and enrolled in the program when eligible.

Once GRID extracts the most relevant customer profiles from the data received (as described above), it will send a CPUC-approved DAC-SASH postcard to those leads. GRID's initial plans are to direct ME&O resources to the Greater San Diego area, because DAC-SASH enrollments are particularly low in SDG&E territory. A postcard campaign to SDG&E's non-tribal leads will be the

top priority, followed by a campaign to Tribal households and their respective liaisons with whom we have an existing relationship in SDG&E territory. GRID looks forward to learning in 2021 if program uptake will increase substantially, or enough to spend the majority of SDG&E's annual DAC-SASH incentive budget.

Second, GRID will prioritize customer profiles located in the Bay Area and North Valley regions. GRID will develop direct mail marketing to send to PG&E homeowners. Mailers from an entity known by the customer have higher success rates, therefore this mailer will ideally include a mention of PG&E and/or its logo, in order to build more trust with potential participants. This additional marketing will need to be approved by the CPUC and PG&E before being deployed.

Third, in much of SCE territory GRID has more easily found qualified DAC-SASH participants. However, GRID may still develop additional direct mail marketing to send to SCE homeowners, particularly in the Greater Los Angeles area where the cost of living is high and finding qualified leads requires additional effort. GRID would also work with SCE and the CPUC to get any new marketing collateral approved.

Finally, in the second half of 2021 GRID may focus on the targeted customer profiles provided that fall under Objective 3 (Highest Need communities), organizing the data to determine if the leads received might boost program participation in any of the High Priority community zip codes and cities (disconnections, AB 617, and San Joaquin Valley pilot area).