

Outreach and Education Plan 2026

SOLAR-UTILITIES REPORTING, GUIDANCE, & EDUCATION (SURGE) SUPPORTING AB 2143 & PUC 769.2



California Public
Utilities Commission



SURGE

Solar-Utilities Reporting
Guidance & Education Program

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Table of Contents

Introduction	4
2026 Outreach and Education Plan Update	4
Purpose of the Plan	4
Background	4
Solar-Utilities Reporting, Guidance, and Education (SURGE)	5
Overview of Reporting Deadlines	5
Outreach Summary for 2025: Key Highlights and Next Steps for Improvement	6
What Went Well	6
Informing Next Year's Strategy	6
2025 Goals and Objectives & Outcomes	7
2025 Additional Outreach Efforts	14
2026 Goals and Objectives	15
Key Stakeholders	18
Identifying Contractors Subject to AB 2143 and PUC 769.2	18
Key Messages	20
Communication Channels	22
Milestone Timeline	24
Educational Materials & Online Resources	27
Translation of Materials	29
Website Layout	29
Stakeholder Workshops & Webinars	30
2025 Stakeholder Workshops & Webinars Summary	30
Event Coordination	31
Trainers and Instructors	31
Event Outreach	32
Event Approach	32
Partnerships and Collaborations	33
2025 Partnerships and Collaborations Summary	33
Engagement Steps	33
2025 Partnerships & Collaboration Updates	34
Promotion and Outreach	37
Outreach Database	37

Distribution & Display of Materials	37
Endorsement at Community or Industry Events	38
Feedback Mechanisms	39
Monitoring and Evaluation	40
Annual Update & Reporting	44
Annual Plan Update	44
Annual Plan Focus Groups	44
Annual Plan Reporting	45
Annual Outreach Survey	45
Appendix	46
Appendix A: SURGE Brand Guide	47
Appendix B: E-blast Messaging Template Example	48
Appendix C: Partnership & Collaboration Email Template	49
Appendix D: Event Email Template Example	50
Appendix E: Registration Page Template Example	52
Appendix F: Public Comments from 2026 Outreach & Education Plan Development	53

Introduction

2026 Outreach and Education Plan Update

As we move into 2026, the Solar-Utilities Reporting, Guidance, and Education (SURGE) initiative, directed by the California Public Utilities Commission (CPUC), continues to prioritize the education and support of contractors and stakeholders impacted by Assembly Bill 2143 (AB 2143) and Public Utilities Code Section 769.2 (PUC §769.2). Our mission remains focused on enhancing compliance, streamlining communication, and ensuring that all affected parties are well-informed about their responsibilities and the resources available to them.

This updated Outreach and Education Plan outlines our goals, objectives, and strategies for the upcoming year. By reviewing and refining our educational materials, improving our communication channels, and fostering stronger partnerships, we aim to support contractors in meeting compliance requirements effectively. We have set clear goals to increase engagement, streamline processes, and enhance accessibility of information, ensuring that our outreach efforts are impactful and inclusive.

Purpose of the Plan

The purpose of the Outreach and Education Plan for the SURGE initiative is to outline the activities necessary to inform and educate contractors, firms, and other stakeholders, such as property owners of qualified projects, that are impacted by Assembly Bill (AB) 2143. The SURGE Outreach & Education Plan will also address knowledge gaps for stakeholders impacted by AB 2143. This plan includes outreach and education tactics to provide information about the payroll submittal compliance requirements, rights, and impacts of noncompliance of AB 2143 to stakeholders. It also addresses partnerships, timelines, and feedback.

Background

AB 2143 (2022, Carrillo) assigned new responsibilities to the CPUC and established minimum wage requirements for construction and apprentice workers of qualifying renewable generation electric facilities constructed after December 31, 2023. AB 2143 requires CPUC to implement a new compliance system to collect and retain payroll records for all qualified projects biannually and provides that a contractor will lose access to standard net energy metering contracts or tariffs in the case of willful violations. The full text of this bill can be accessed at the following website:

https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202120220AB2143

Solar-Utilities Reporting, Guidance, and Education (SURGE)

SURGE is dedicated to implementing and maintaining a compliance system (SURGE Compliance Portal) to collect and retain payroll records for all qualified projects. While AB 2143 requires contractors to submit payroll records biannually, SURGE allows contractors to submit payroll records biannually, quarterly, or on a monthly basis.

SURGE is also responsible for educating stakeholders, including contractors working on qualified projects, about certified payroll record reporting and other AB 2143 requirements. Through educational materials, workshops, webinars, and partnerships with industry associations and utilities, SURGE guides stakeholders through compliance requirements. This ensures that contractors are included and allows all contractors to meet payroll reporting requirements.

Overview of Reporting Deadlines

Per AB 2143, contractors on eligible projects must submit digital copies of certified payroll records twice a year, on July 1st and December 31st of each year, via the SURGE Compliance Portal. The CPUC is required to hold these as public records for five (5) years.

Outreach Summary for 2025: Key Highlights and Next Steps for Improvement

Throughout 2025, our outreach efforts focused on continuing to build awareness of AB 2143 and PUC 769.2 compliance requirements among solar contractors, building our resource library for ease of access, and improving communication channels. Key outreach activities included educational webinars and workshops, participating in partnership events, and consistent email campaigns and social media outreach via LinkedIn to inform contractors about registration processes and compliance updates. Our team also expanded the SURGE Compliance Portal's resources, adding tools like FAQs, instructional videos, and Q&A documents to assist contractors with navigating AB 2143 requirements.

What Went Well

The outreach strategy succeeded in increasing visibility and engagement with contractors and stakeholders subject to AB 2143 and PUC 769.2 requirements. Participation in our webinars and workshops exceeded expectations. Collaboration with partners, including the Investor-Owned Utilities (IOUs) and the Department of Industrial Relations (DIR) Labor Commissioner's Office, helped strengthen our reach, allowing us to share essential information with a broader audience. Additionally, the SURGE Compliance Portal continues to be well received by contractors. The number of contractors accessing the site and using its resources has continued to increase throughout 2025.

Informing Next Year's Strategy

Building on these successes, we aim to refine our approach by addressing feedback gathered from contractors and stakeholders. More details of our goals can be found in the "2026 Goals and Objectives" section.

Overall, our learnings from 2025 position us well to enhance the effectiveness and reach of our outreach in the coming year, with a clear focus on accessibility, clarity, and support tailored to contractor needs.

2025 Goals and Objectives & Outcomes

The following goals for the SURGE Outreach and Education Plan were designed to ensure that contractors and firms impacted by AB 2143 and PUC 769.2 were fully aware of the regulation and its requirements. Each goal consists of specific objectives to achieve the goals and a status of “not started,” “in progress,” “ongoing,” or “completed.”

Goal 1: Enhance contractor and stakeholder awareness of AB 2143 and PUC 769.2 compliance requirements through planned and coordinated outreach events.

Objective	Objective Achieved?	2025 Metrics Results
1.1 Develop a calendar of events for 2025 and include AB 2143 and PUC 769.2 Contractor Compliance Trainings.	Completed. GCAP developed an official events list which can be found here: https://cpucsurge.org/happenings/	<ul style="list-style-type: none"> • Total number of events and locations <ul style="list-style-type: none"> ○ 1 conference (Long Beach, CA) ○ 4 workshops (virtual) ○ 2 focus groups (virtual) • Number of registered attendees vs. actual attendees per SURGE hosted event <ul style="list-style-type: none"> ○ 3/25/25: What is AB 2143/ PUC 769.2? How to Stay in Compliance <ul style="list-style-type: none"> ▪ Registered: 218 ▪ Attended: 160 ○ 4/16/25: AB 2143/PUC 769.2 Informational Webinar (Co-Hosted with the DIR) <ul style="list-style-type: none"> ▪ Registered: 243 ▪ Attended: 165 ○ 6/11/25: AB 2143 SURGE Compliance Portal Workshop <ul style="list-style-type: none"> ▪ Registered: 125 ▪ Attended: 87 ○ 10/28/25: SURGE Informational Workshop for AB 2143 <ul style="list-style-type: none"> ▪ Registered: 116
1.2 Participate in Solar Events in California (North, Central, and Southern) to table/exhibit or workshop on how to submit payroll records to SURGE.	Completed. GCAP hosted online workshops on how to submit payroll records to SURGE.	
1.3 Host the Annual Outreach and Education Workshop for 2026.	Completed. GCAP hosted two (2) focus groups for the Outreach and Education Workshop.	

		<ul style="list-style-type: none">▪ Attended: 73○ 11/21/25: AB 2143 Outreach and Education Focus Group<ul style="list-style-type: none">▪ Registered: 10▪ Attended: 8○ 12/2/25: AB 2143 Outreach and Education Focus Group<ul style="list-style-type: none">▪ Registered: 10▪ Attended: 6• Number of surveys completed: 12 responses received from contractors/stakeholders
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Goal 2: Improve outreach and educational materials with a focus on accessibility and language translation.

Objective	Objective Achieved?	2025 Metrics Results
<p>2.1 Develop statement for language translation request and place on a prominent space on the SURGE website.</p>	<p>Not Started</p>	<ul style="list-style-type: none"> • Track number of translation requests received and response times. <ul style="list-style-type: none"> ○ No translations requests were received in 2025. • Identify types of accessibility gaps identified and solutions. <ul style="list-style-type: none"> ○ Clarity and Accuracy of Time-Sensitive Information: Updating the deadlines for AB 2143 payroll submissions to reflect 2025 deadlines. ○ Readability and Ease of Understanding: Updated language and removed complex information. ○ Visual Accessibility: Changing the formatting of text and graphics. • Feedback from contractors/stakeholders regarding the accessibility of outreach materials. <ul style="list-style-type: none"> ○ Most contractors/stakeholders found no issues with the accessibility of outreach materials, but some did mention that navigating to them on the website was an issue, and that some language was unclear. The SURGE team will be working to streamline outreach materials in 2026.
<p>2.2 Enhance existing process for contractors/stakeholders to request language translation of SURGE outreach and education materials.</p>	<p>Not Started</p>	
<p>2.3 Conduct a brief audit of existing outreach and educational materials to identify accessibility gaps.</p>	<p>Completed. GCAP conducted an audit of the website and resource materials to identify any accessibility gaps.</p>	
<p>2.4 Make accessibility updates to SURGE outreach and education materials and efforts.</p>	<p>Completed. GCAP updated SURGE outreach and education materials.</p>	

Goal 3: Increase contractor compliance rates for submitting copies of certified payroll records mandated by AB 2143 and PUC 769.2 via the SURGE Compliance Portal.

Objective	Objective Achieved?	2025 Metrics Results
<p>3.1 Ensure that 100% of contractors subject to AB 2143 and PUC 769.2 who are not yet registered on the SURGE Compliance Portal complete their registration by the next Outreach and Education Plan Annual update for 2026.</p>	<p>In Progress. While GCAP made improvements to these numbers, we did not reach the goal of 100% of contractors subject to AB 2143 registering on the compliance portal. For contractor registration, there are 21.4% of unique contractors registered on SURGE based on the total number of unique contractors that may be subject to AB 2143 and PUC 769.2. For project registration, 53.4% is the percentage of projects registered on SURGE based on the total number of projects that may be subject to AB 2143 and PUC 769.2.</p>	<ul style="list-style-type: none"> • Number of Projects subject to AB 2143 and PUC 769.2 vs. Projects Registered on SURGE <ul style="list-style-type: none"> ○ Number of Projects that may be subject to AB 2143 and PUC 769.2 = 1098 <ul style="list-style-type: none"> ▪ PG&E = 628 ▪ SCE = 305 ▪ SDG&E = 165 ○ Number of Projects Registered on SURGE = 586 (53.4%) ○ There may be 512 projects that may be subject to AB 2143 and PUC 769.2 and may need to register on SURGE Compliance Portal.
<p>3.2 Achieve 100% submission rate of copies of certified payroll records by contractors registered on the SURGE Compliance Portal with qualified projects.</p>	<p>In Progress. While GCAP made improvements to these numbers, we did not reach the goal of 100% payroll submission rate on the SURGE Compliance Portal for contractors subject to AB 2143. Of the 586 projects registered in SURGE, 562 projects (95%) have submitted at least 1 copy of certified payroll records. This calculation is based on the number of registered projects, not on the amount of payroll expected to be submitted. Expected payroll cannot be used as</p>	<ul style="list-style-type: none"> • Number of Unique Contractors subject to AB 2143 and PUC 769.2 <ul style="list-style-type: none"> ○ Number of Unique Contractors that may be subject to AB 2143 and PUC 769.2 = 487 <ul style="list-style-type: none"> ▪ PG&E = 269 ▪ SCE = 145 ▪ SDG&E = 73 ○ Number of Contractors Registered on SURGE = 104 • List of areas to streamline internal process review of SURGE Compliance

	<p>a reliable measure because it depends on project start and end dates, and contractors have not been reporting this information accurately.</p>	<p>Portal forms with actions taken to address and status of task.</p> <ul style="list-style-type: none"> ○ Monitoring Compliance – Utilizing advance reporting features and develop tracking sheets.
<p>3.3 Identify areas to streamline internal processes for reviewing SURGE Compliance Portal submissions for Contractor Registration, Project Registration, and Certified Payroll Submission.</p>	<p>In Progress. The SURGE Team is reviewing the submission processes and looking for ways to streamline each one. We will also review potential updates that can be made based on contractor feedback during the Outreach and Education Focus Groups.</p>	

Goal 4: Streamline educational materials and resources to enhance contractor knowledge of AB 2143 and PUC 769.2 compliance requirements.

Objective	Objective Achieved?	2025 Metrics Results
4.1 Review and update all outreach and education materials (SURGE Website, Resource, Frequently Asked Questions) to simplify information shared with contractors/stakeholders.	In progress. This objective is an ongoing process based on contractor feedback, questions received during events, and contractor scenarios that the SURGE Team notices are coming up frequently.	<ul style="list-style-type: none"> • Log of outreach and educational materials and what updates have been made <ul style="list-style-type: none"> ○ SURGE has 5 main flyers, and 1 was updated to reflect new timelines for AB 2143 compliance payroll submissions. • Type of requests from contractors/stakeholders and the frequency <ul style="list-style-type: none"> ○ The top 3 contractor requests include: understanding which projects are subject to AB 2143 when they receive a hold from the IOUs, eligibility exceptions, and what is required for certified payrolls and submission to the SURGE Compliance Portal. • Log of changes to legislation or compliance process <ul style="list-style-type: none"> ○ There have been no changes to legislation or the compliance process.
4.2 Create a Contractor Response Template for standardizing responses sent to Contractors.	Not started.	
4.3 Ensure that all outreach and educational materials are regularly updated to reflect any changes in legislation or compliance processes.	Completed. As of January 2026, the DIR has determined that the prime contractor will now be the awarding body. SURGE will work with the DIR to update outreach and education materials in 2026 to reflect this change. SURGE will continue to monitor any official changes to the legislation or compliance process and make updates as needed to the outreach and educational materials.	

Goal 5: Strengthen partnerships and collaborate with solar organizations to share information on AB 2143 and PUC 769.2.

Objective	Objective Achieved?	2025 Metrics Results
<p>5.1 Meet with Solar Organizations and participate in meetings or other opportunities to collaborate.</p>	<p>Completed. GCAP performed outreach to solar organizations and hosted a joint webinar with the Department of Industrial Relations (DIR) Labor Commissioner's Office.</p>	<ul style="list-style-type: none"> • Number of meetings held and with who <ul style="list-style-type: none"> ○ No meetings were requested in 2025. • Engagement rates <ul style="list-style-type: none"> ○ Out of the 11 organizations (listed under "Partnerships and Collaborations"), SURGE has communicated and partnered with 3 organizations. • Feedback received from organizations <ul style="list-style-type: none"> ○ No feedback received.
<p>5.2 Identify points of contact with solar organizations and share outreach and education material relevant to their stakeholders.</p>	<p>Completed. Points of contact were identified, and materials and resources were shared with the individual contacts at each organization</p>	
<p>5.3 Develop an outreach packet to share with solar organizations with information regarding AB 2143 and PUC 769.2 and contractor compliance requirements for distribution to networks.</p>	<p>Completed. A media kit was developed and shared with contacts at each solar organization.</p>	

2025 Additional Outreach Efforts

- **Sent Weekly Email Campaigns for AB 2143/ PUC 769.2 Outreach:** The SURGE team consistently sent weekly email campaigns to provide contractors information on resources, deadlines, and other important topics relevant to AB 2143 and PUC 769.2.
- **Host Webinar with Department of Industrial Relations (DIR):** SURGE partnered with the DIR Labor Commissioner's Office to co-host an informational webinar on AB 2143 and provide contractors and stakeholders with pertinent information on prevailing wages.
- **Recorded Contractor Compliance Walkthrough Videos:** SURGE recorded videos demonstrating how to navigate the SURGE Compliance Portal and how to register as a contractor, register a project, and submit copies certified payroll records.
- **Developed SURGE Video Resource Guides for Contractors:** Recorded a video resource for contractors to help them navigate the DIR website and resources and a walkthrough of the SURGE Compliance Portal.
- **Sharing DIR Resources and Information on SURGE Website:** To help provide all available AB 2143 resources to contractors, we included the links to DIR resources and training on the SURGE website.
- **Shared AB 2143/PUC 769.2 Media Kit with Solar Industry Organizations:** Sent solar industry organizations a media kit that included a SURGE email template, contractor resource flyer, and social media graphic.

2026 Goals and Objectives

The following SURGE goals for the 2026 AB 2143 Outreach and Education Plan are designed to ensure that contractors and firms impacted by AB 2143 are fully aware of the regulation and its requirements. Each goal consists of specific objectives to achieve in 2026, estimated completion date or frequency, and metrics to collect.

Goal 1: Enhance contractor and stakeholder awareness of AB 2143 and PUC 769.2 compliance requirements through planned and coordinated outreach efforts.

Item	2026 Objectives	Estimated Completion Date or Frequency	Metrics to Collect
1.1	Host one workshop event each quarter	Each quarter	<ul style="list-style-type: none"> Number and type of events Number of registered attendees and actual attendees
1.2	Cohost 1 – 2 events with the Department of Industrial Relations (DIR) to enhance understanding with prevailing wage requirements	August 2026	<ul style="list-style-type: none"> Number of registered vs. actual attendees Number of questions received
1.3	Develop and send weekly outreach emails	Weekly	<ul style="list-style-type: none"> Number of emails sent Email open rate
1.4	Create and upload LinkedIn posts	Weekly	<ul style="list-style-type: none"> Number of posts Engagement rates (likes, comments, and reposts)

Goal 2: Increase contractor compliance rates for submitting copies of certified payroll records mandated by AB 2143 and PUC 769.2 via the SURGE Compliance Portal.

Item	2026 Objectives	Estimated Completion Date or Frequency	Metrics to Collect
2.1	Send target outreach emails to contractors who have interconnection applications and are not registered on the SURGE Compliance Portal	Monthly	<ul style="list-style-type: none"> • Email content language • Number of emails sent to contractors • Number of new contractors registered
2.2	Process reviews of Contractor Registration, Project Registration, and Payroll Submission within 2-3 business days of submission	Weekly	<ul style="list-style-type: none"> • Number of Contractor Registrations approved • Number of Project Registrations approved • Number of Payroll Submissions approved
2.3	Develop a system through the SURGE Compliance Portal to send reminders and follow-up to contractors to submit their payroll records for active projects subject to AB 2143	Weekly	<ul style="list-style-type: none"> • Number of Payroll Submissions approved • Number of reminder emails and follow ups sent
2.4	Identify contractor pain points using the SURGE Compliance Portal and provide helpful tips and guidance to ensure smooth submittable of copies of certified payroll records	June 2026	<ul style="list-style-type: none"> • Number of contractor pain points identified • Solutions provided for each pain point

Goal 3: Create streamlined educational materials and resources for contractors new to AB 2143 and PUC 769.2 compliance requirements.

Item	2026 Objectives	Estimated Completion Date	Metrics to Collect
3.1	Create a simple one-page “AB 2143 Starter Guide”	March 2026	<ul style="list-style-type: none"> Content and language created for the guide Number of downloads
3.2	Develop beginner-level onboarding video recordings specifically for new contractors	June 2026	<ul style="list-style-type: none"> Number of views
3.3	Identify additional avenues and share educational materials to contractors new to AB 2143 and PUC 769.2 compliance requirements	June 2026	<ul style="list-style-type: none"> Number of additional avenues Number of emails sent to new avenues

Goal 4: Strengthen communication and increase transparency with contractors to share information on AB 2143 and PUC 769.2.

Item	2026 Objectives	Estimated Completion Date	Metrics to Collect
4.1	Create and update step-by-step guides and other resources for role-specific compliance materials	March 2026	<ul style="list-style-type: none"> Number of resources updated Number of new resources created
4.2	Update guide that shows information needed for SURGE and DIR respectively	March 2026	<ul style="list-style-type: none"> Updated content Number of downloads
4.3	Maintain and update the SURGE website and ensure latest information is shared and posted	Monthly	<ul style="list-style-type: none"> Each webpage reviewed and updated Number of website page views
4.4	Develop and maintain “Important Notices” section on the homepage of the website with latest regulation updates	January 2026 and Ongoing	<ul style="list-style-type: none"> Section created on website Number of times updated

Key Stakeholders

To support the goals and objectives of the SURGE Outreach and Education Plan, it is essential to include the following key stakeholders in the outreach and education of SURGE: contractors of qualified renewable electric facilities and property owners of qualified projects. Additionally, below is a list of the stakeholders that would be interested in or impacted by AB 2143.

- **Contractors of Qualified Renewable Electric Facilities.** These stakeholders include construction firms and professionals involved in the development and construction of renewable electrical generation facilities. AB 2143 impacts these groups by requiring that they pay the appropriate prevailing wage requirements and provide biannual reporting information on public works qualified projects.
- **Property Owners of Qualified Projects.** These include individuals or entities that own properties hosting qualified renewable electrical generation projects. Property owners may be impacted if the contractors hired are found to have willful wage violations, in which case the project will lose access to any net energy metering or net billing tariff until violations are remedied.
- **Public Utilities Commission.** California Public Utilities Commission (CPUC) is responsible for implementing and enforcing AB 2143 rules and regulations. Its central role is to inform and educate key stakeholders and ensure compliance and reporting on progress. The CPUC carries out these obligations through working with its consultant GCAP Services, LLC.
- **Electrical Corporations.** As the entities responsible for generating, transmitting, and distributing electrical power, these electrical corporations facilitate net energy metering tariffs for renewable electrical facilities.
- **Industry Partners.** These include businesses and organizations collaborating with the renewable energy and construction industries. Their role is to help with information sharing and bringing awareness to SURGE rules and requirements for contractors of qualified renewable electric facilities and property owners of qualified projects. Industry partners will contribute valuable insights, playing a crucial role in refining and optimizing the content and information provided to stakeholders. These partnerships are essential for gathering feedback and suggestions, ensuring a more effective rollout of materials.

Identifying Contractors Subject to AB 2143 and PUC 769.2

The SURGE team has refined our method of identifying contractors with qualified projects subject to AB 2143 and PUC 769.2. We leverage the database portals of the Utilities—Pacific Gas and Electric (PG&E), Southern California Edison (SCE), and San Diego Gas and Electric (SDG&E). These portals contain a list of Interconnection Applications submitted by contractors, which are crucial for identifying those who fall under the compliance requirements of AB 2143 and PUC 769.2.

By accessing these Interconnection Applications, we can accurately pinpoint the contractors involved in projects that must adhere to the new legislative mandates. This targeted approach ensures that our outreach efforts are precise and effective, directly reaching those who need to comply with the new regulations.

This not only streamlines SURGE's identification process but also enhances the efficiency of our communication and support, allowing the team to better assist contractors in meeting their compliance obligations.

Key Messages

The primary messages to be conveyed regarding SURGE will be tailored to different segments of the target audience. These key messages will help support the goals and objectives of the SURGE Outreach and Education Plan by providing the content needed to inform and educate impacted stakeholders. The following will be the key messages shared across all communication channels and will be tailored, reviewed, and updated as changes/updates occur or as needed.

- **What is AB 2143?**

Assembly Bill (AB) 2143, effective January 1, 2024, mandates prevailing wages for construction workers and apprentices on large customer-sited renewable electrical generation (solar) facilities with associated battery storage. Exemptions include residential facilities with a capacity of 15 kW or less, those installed on single-family homes, projects already classified as public works, and facilities serving specific housing types. Contractors must maintain and verify certified payroll records, submitting digital copies twice a year (July 1st and December 31st). Willful wage violations can lead to the loss of net metering or billing tariffs for the associated project.

- **What are the requirements of AB 2143?**

Any contractor entering into a contract to perform work on AB 2143 eligible projects must pay workers, at a minimum, the general prevailing wage per diem, unless the worker is an apprentice registered in a program approved by the Chief of the Division of Apprenticeship Standards, who must receive, at a minimum, the applicable apprentice prevailing rate. Additionally, contractors on qualified projects will need to submit their payroll records through the SURGE website biannually on July 1st and December 31st.

- **Who is impacted by AB 2143 and what do you need to do?**

AB 2143 affects contractors and workers performing work on qualified renewable energy projects. Property owners of qualified projects should also be aware of AB 2143 rules and will be required to sign a Prevailing Wage Disclosure form included in the interconnection application.

The rules don't apply to residential projects with a generating capacity of 15 kilowatts or less, certain existing public works, or facilities serving specific types of housing. The following outlines the specific exemptions under AB 2143:

- x **Residential Facilities.** The prevailing wage requirements do not apply to residential renewable electrical generation facilities with a maximum generating capacity of 15 kilowatts or less, eligible for service under a standard contract or tariff.

- x **Single-Family Homes.** Residential facilities installed on single-family homes, eligible for service under a standard contract or tariff, are exempt from prevailing wage requirements.
- x **Public Works Projects.** Projects classified as public works under Section 1720 of the Labor Code and subject to Article 2 of Chapter 1 of Part 7 of Division 2 of the Labor Code are exempt from the prevailing wage provisions.
- x **Modular Homes and Multiunit Housing.** Prevailing wage requirements do not apply to renewable electrical generation facilities serving only modular homes, modular home communities, or multiunit housing with two or fewer stories.

Additionally, AB 2143 does not apply to customers not participating in the net metering and net bill tariffs for investor-owned utilities (IOU). This includes publicly-owned utilities (POU) customers as well as non-export commercial companies in IOU territories.

Contractors will need to visit the AB 2143 website and complete the contractor registration and project registration to submit their payroll reports by the reporting deadlines on July 1st and December 31st.

- **When does AB 2143 take effect?**

AB 2143 is effective January 1, 2024.

Communication Channels

The following communications channels will be utilized to reach target audiences and share information regarding SURGE: website, emails, e-blasts, and phone calls. These channels facilitate the effective dissemination of information, engagement with stakeholders, and the achievement of key goals outlined in the plan. Here's how various communication channels contribute to supporting the plan's objectives:

- **Website.** The custom website is located at www.cpucsurge.org and acts as the main source of information about AB 2143 requirements and includes tools, required forms, educational materials, frequently asked questions (FAQs), and a link to the online document submittal platform. The website acts as a hub in which all information regarding SURGE will be available to stakeholders. The website will continue to be maintained and updated as needed throughout the life of the program. Key stakeholders can access the website at their convenience, enabling them to review all outreach materials and stay informed about AB 2143 requirements. Additionally, the website utilizes search engine optimization (SEO) strategies to enhance the website's visibility and positioning in organic search results. These strategies include optimizing individual pages of the website for specific keywords using content, meta tags, headers, and images (alt-text) to make them more search engine-friendly.
- **Chat Bot.** The website includes a simplified chat bot interface to engage with website visitors, answer queries promptly, and enhance overall user experience. This works by providing a list of pre-listed frequently asked questions about SURGE information. These questions include: 1) What is SURGE? 2) Am I impacted by SURGE? 3) I am a contractor, how do I know if my project has SURGE compliance requirements, and 4) How do I report my payrolls for SURGE? Additional questions on project exemptions and eligibility will be added in 2026 and will also be developed as more inquiries are received. If the chat bot is unsuccessful at answering website visitor's inquiries, they will be prompted to send an email or call the dedicated phone line for SURGE information.
- **Emails.** Email provides a convenient channel for key stakeholders to seek immediate clarification and assistance to help contribute to their understanding of SURGE and promoting compliance. All email inquiries will be responded to within 24 business hours. The dedicated email address for SURGE inquiries and feedback is info@cpucsurge.org. Additional email addresses have been developed to address specific areas for outreach (outreach@cpucsurge.org) and contractor reporting (reporting@cpucsurge.org). An analysis of email inquiries will be conducted to identify common areas of support to help improve the information shared on the website. By categorizing inquiries by topic—such as registration issues, payroll submissions, reporting timelines, and document requirements—the analysis will reveal areas where more detailed guidance or accessible resources are needed on the website. This will allow us to make

targeted updates to the FAQs, resource pages, and instructional guides, aiming to reduce email inquiries by proactively addressing contractor needs.

- **E-Blasts.** On a weekly basis, e-blasts with SURGE information will be shared and disseminated to the outreach database. This will be used as a communication channel to inform stakeholders about current SURGE compliance requirements, updates, and other relevant information. These e-blasts will be designed and sent through Constant Contact.
- **Phone Calls.** Phone calls will provide one-on-one education assistance to directly address key stakeholders' specific queries, supporting the goal of providing support to the overall understanding of SURGE compliance requirements. The dedicated phone line for SURGE inquiries, questions, and feedback is 1-800-549-2143. Any inquiries on voicemails will be responded to within 24 business hours. An analysis of phone inquiries will be conducted to identify common areas of confusion to help improve the information shared on the website.
- **Outreach Events.** Outreach events provide a unique opportunity for face-to-face interaction, enabling direct communication between key stakeholders. If possible, in-person events will include an exhibition table that will help disseminate information and provide on-site guidance to contractors and property owners for SURGE. Outreach events are also an opportunity to network with a variety of stakeholders and gain an understanding of and feedback on the impact of SURGE.

Milestone Timeline

Below is the annual schedule for the SURGE Outreach and Education Plan which includes the tentative annual deadlines for each milestone activity.

Milestone Activity	2025 Annual Deadline	Status
1) SURGE Outreach and Education Plan Annual Update	Every November	In Progress The SURGE Outreach and Education Plan is currently being updated and feedback is being collected from stakeholders.
a) Facilitate and Host Annual Focus Groups (In-Person or Webinar) to Present SURGE Outreach and Education Plan	Every Mid-November/ Early December	In Progress The annual Focus Groups are scheduled for November 20 th 12-1 pm PST, and December 1 st , 5-6 pm PST via Microsoft Teams Meeting.
2) Recording and Responding to Comments Received from Stakeholder Workshops and Webinars	Per Event	Completed All questions collected from 2025 SURGE events were compiled in Q&A documents and collaborated with CPUC and DIR to finalize responses to stakeholders.
3) Develop and Maintain Communication Channels: Dedicated Phone Line, Email Service, and Online Chat Interface for SURGE Inquiries	Ongoing	Completed SURGE communication channels have been finalized. Maintenance of these channels is ongoing.
a) Dedicated Phone Line	End December 2023	Completed The SURGE dedicated phone line (1-800-549-2143) is available Monday through Friday from 8 AM – 5 PM, excluding any major holidays.
b) Email Service		Completed

	End December 2023	SURGE has developed the following email addresses (info@cpucsurge.org ; reporting@cpucsurge.org ; outreach@cpucsurge.org) for contractor and stakeholder inquiries. SURGE monitors and responds to contractor and stakeholder emails within 24-48 hours.
c) Online Chat Interface (Chat Bot)	Late February 2024	Completed The SURGE Help Bot is available on the SURGE website and is another channel for contractors and stakeholders to seek responses to their questions. If the chat bot is unable to help, contact information is provided to contractors and stakeholders to contact SURGE Support Team directly.
4) Develop Outreach and Educational Materials as Listed in SURGE Outreach and Education Plan and Incorporate Any Updates in Policies or Regulations	See specific timelines below for collateral materials:	
a) Website <ul style="list-style-type: none"> ▪ Content Language (About SURGE, Outreach/Education Materials, Calendar of Events, Resources, Reporting & Compliance Guidance and Steps) 	Late January 2024	Completed SURGE website is up and running and is continuously monitored and updated as needed.
b) SURGE Fact Sheets	Late January 2024	Completed SURGE flyers have been developed for major topics that address contractor and stakeholder concerns.

		These resources are found on the SURGE website under "Education" tab.
c) SURGE Payroll Reporting Guidelines	Late January 2024	<p>Completed</p> <p>SURGE has provided step-by-step process guides and walkthrough videos for reporting copies of certified payrolls by contractors subject to AB 2143 and PUC 769.2. These resources are found on the SURGE website under "Education" tab.</p>
5) Translate SURGE Outreach and Educational Materials	As Needed	<p>Not Started</p> <p>SURGE has not received any contractor or stakeholder request to translate materials. However, the SURGE website language can toggle between English and Spanish.</p>
6) Provide Outreach Materials for Posting to CPUC Website	Ongoing	<p>Completed</p> <p>The CPUC has a website dedicated to AB 2143 and PUC 769.2 information and provides background on SURGE and a link to the SURGE website. SURGE outreach materials are provided to CPUC as they are requested.</p>

Educational Materials & Online Resources

The AB 2143 Outreach and Education Plan includes various types of comprehensive and accessible educational materials and online resources that will be provided to key stakeholders.

Resources	Description	Development Timeline	2025 Results
Flyers, Fact Sheets, & Other Written Materials	Outreach materials such as flyers, fact sheets, prepared written materials, etc. will be developed to share detailed information on SURGE requirements and compliance information. These PDF outreach materials will be uploaded and posted to the SURGE website for easy online access and download by all stakeholders. Please note that digital materials will be prioritized over printed collateral. Additionally, final resource materials will be shared with CPUC to add to their websites and quick design graphics will be developed to share to social media outlets with links to final documents.	Late January 2024	Completed SURGE flyers, fact sheets, and other written materials have been developed and are being continuously updated. These resources are located on the SURGE website under "Education" tab.
Social Media Posts and E-Blasts	Short and engaging social media posts will be used to produce eye-catching content and disseminate bite-size information and updates regarding SURGE. E-blasts will also be utilized as targeted email communications to deliver important announcements and resources to key stakeholders.	Early January 2024	Completed SURGE has set up LinkedIn and Constant Contact to engage with stakeholders.
Website Content	SURGE will have a dedicated user- and mobile-friendly website to act as a centralized information hub to easily	Mid-January 2024	Completed The SURGE website is up and running and is the hub for all

	provide navigation and up-to-date information to key stakeholders. Education and outreach materials will be available on the CPUC website to ensure widespread accessibility of information. Additionally, SEO optimization will be prioritized on the website to ensure contractors are able to search and find SURGE information and requirements.		information and resources for AB 2143 and PUC 769.2.
Frequently Asked Questions (FAQ)	Inquiries or questions that are frequently asked by stakeholders will help to produce SURGE FAQs. These FAQs will be available on the website and accessible by all stakeholders. This information will help to clarify stakeholders' questions.	Late January 2024	Completed SURGE has compiled FAQs from contractors and stakeholders and have summarized and placed them on the SURGE website under "FAQs" tab.
One-on-One Education Assistance	Upon request, stakeholders, qualified reporters will be able to access on demand one-on-one education assistance to help provide personalized guidance and clarification to address specific inquiries promptly and on how to navigate the online document submittal process.	Ongoing	Completed SURGE offers various avenues for one-on-one support and assistance to contractors subject to AB 2143 and PUC 769.2 to help them understand compliance requirements. These are offered by phone calls and 1-on-1 meetings.
Educational Videos	Prerecorded educational videos will be developed to share information on SURGE and instructions on the CPUC online document submittal process. This will offer a dynamic visual	Mid-March 2024	Completed SURGE has prepared educational videos for contractors to navigate the SURGE Compliance Portal

learning experience, breaking down complex concepts into easily digestible segments for enhanced understanding.

and how to complete the following forms: Contractor Registration, Project Registration, and Certified Payroll Submission.

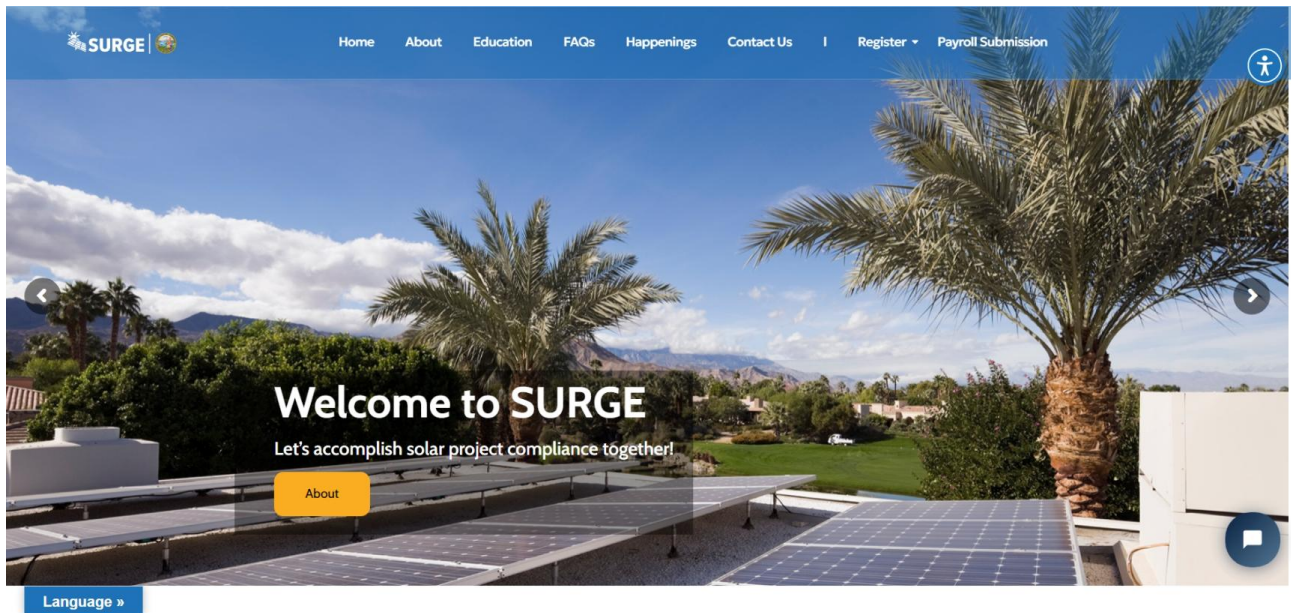
The development of these educational materials aligns with the goal and objectives listed above. There may be additional educational materials and online resources that are not currently on this list. If there are other creative ways to share information, they will be proposed to the CPUC Project Manager for approval. The SURGE Outreach and Education Plan outlines the development of a comprehensive and inclusive strategy, ensuring that educational materials and resources are easily accessible, regionally relevant, and communicated through a variety of mediums for maximum impact.

Translation of Materials

Ensuring that outreach materials are accessible to diverse linguistic communities is crucial for the success of the SURGE Outreach and Education Plan. The translation process involves several steps to guarantee accurate and culturally sensitive translations. At stakeholder request for materials, SURGE will collaborate with language experts, review and ensure translation accuracy, and obtain stakeholder feedback of requested translated materials. In 2025, there were no requests for translation of materials.

Website Layout

The SURGE website serves as the primary destination for individuals seeking information on rules and regulations, encompassing a registration portal for contractors and projects to submit prevailing wage payrolls. All outreach materials will be housed on the SURGE website. The website structure is outlined in the layout below. The complete website was operational as of the end of January 2024.



The Official AB 2143 Resource for Helping Contractors Navigate Renewable Energy Compliance with Ease.

Stakeholder Workshops & Webinars

To educate stakeholders on SURGE, there will be at least two (2) hosted presentations or webinars (not to exceed 6) per year to share information on reporting requirements, procedures, and impacts for non-compliance. Events will educate participants on SURGE and allow for questions and provision of technical assistance.

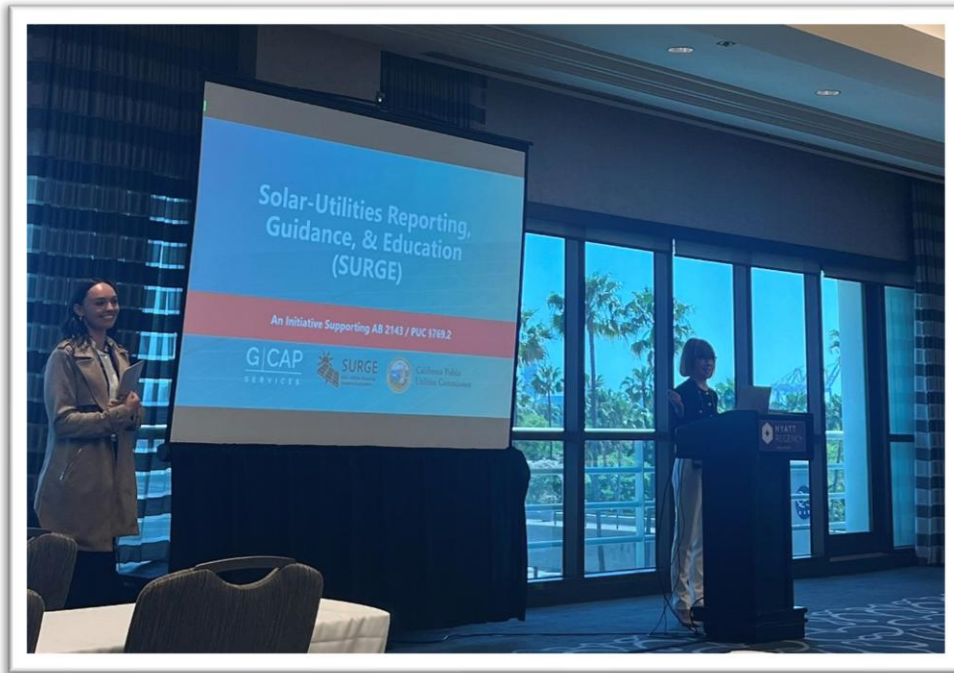
Presentations may be held at public meetings, hosted by other CPUC programs or other partners/collaborators, or organized in-person or via webinar. Each engagement will consist of providing hosting services, agendas, presentations and other collateral materials, recording feedback and other information. Recording of instructions and webinars will be uploaded to the website and available on-demand online.

Finally, following up each engagement, a summary of stakeholders' written and verbal feedback will be provided to be analyzed for ways to continuously improve engagements moving forward.

2025 Stakeholder Workshops & Webinars Summary

SURGE hosted a total of 4 stakeholder workshops and webinars in 2025. On April 16, 2026, SURGE partnered with the Department of Industrial Relations (DIR) to host an informational webinar to share compliance requirements and reporting guidance. SURGE hosted 3 webinars independently, focusing on information about AB 2143,

compliance portal education, and contractor education. For all of the SURGE hosted events in 2025, 702 people registered for our events with 485 attending, resulting in a 69% attendance rate. Additionally, the SURGE team presented in person at the annual LCPTracker Ignite conference in May 2025. This presentation focused on an overview of AB 2143 and related Public Utilities Code (PUC) §769.2 requirements for commercial solar construction projects (i.e., solar panel and associated battery storage).



Caption: Image of the SURGE Team presenting at the LCPTracker Ignite Conference in May 2025.

Event Coordination

All workshop and webinar materials, such as PowerPoint presentations, agendas, and other materials will be developed for each workshop. Physical sign in sheets will be used for in-person events and for virtual events, information will be collected through the chat function or using an online form. By doing so, the outreach database will be able to grow over time and expand ongoing outreach efforts.

Trainers and Instructors

In preparation for each stakeholder workshop and webinar, trainers and instructors will be identified ahead of each engagement. The selection will be based on their availability and capacity for each engagement. The following individuals have been designated as instructors for AB 2143 and PUC 769.2 requirements:

- Sylvia Linn, Project Manager
- Ariana Fernandez, Senior Prevailing Wage Consultant & Trainer

Event Outreach

To effectively inform stakeholders of workshops and webinars, the outreach database will be used in addition to leveraging partner associations to help notify contractors of workshop and webinar locations, dates, and times. The event information will be posted on the SURGE website, e-blasts will be sent out, and other forms of outreach will be utilized to notify the outreach database about these workshops and webinars.

Event Approach

To ensure that contractors comprehend SURGE requirements and impacts of non-compliance, the training staff will simplify technical requirements into easily understandable material for contractor audiences. The trainers will utilize PowerPoint presentations that employ less technical language, include easy-to-understand directions, and utilize graphics and diagrams for visually explaining SURGE compliance requirements.

To improve attendance and encourage continued learning, each webinar and presentation will be recorded. Within a week of each webinar or presentation, recordings will be made available online. Links to these recordings will be placed on the SURGE website so that contractors can easily access them anytime. Contractors that access the website will be able to review these recordings, and utilizing our help line, email address, and chat interface on the website, contractors can reach out with additional questions.

Partnerships and Collaborations

To ensure the success of the implementation of SURGE, it is important to drive continued engagement from industry stakeholders including various solar and energy associations across the state. Relationships with the stakeholders listed below will be established to allow for an open dialogue and sharing of important regulatory information.

Stakeholders benefit from these partnerships by being the first to know about important updates and changes, upcoming training, and other program information to assist and add value for their members as well as attract new members.

These partnerships are leveraged to disseminate information to impacted vendors, receive feedback and input, and understand overall impressions of program implementation. Additionally, association partners will be leveraged for their assistance with in-person outreach events and statewide workshops as needed.

2025 Partnerships and Collaborations Summary

In 2025, SURGE strengthened its outreach and education initiatives through strategic partnerships and collaborations with key organizations, including the Department of Industrial Relations (DIR), Investor-Owned Utilities (IOUs), and various industry associations such as GRID Alternatives and the California Solar & Storage Association (CALSSA). These partnerships were instrumental in enhancing the effectiveness of our programs and expanding our reach to contractors affected by AB 2143 and PUC 769.2. As we move forward, we will continue to strengthen these relationships, fostering a collaborative environment that supports contractors and promotes ongoing education and compliance.

Engagement Steps

Here are the steps to engage with these industry partners:

1. **Identify Key Industry Partners.** Identify and prioritize industry partners who are directly relevant to the goals and objectives of SURGE. Consider organizations, companies, or associations that share a common interest in renewable energy, construction, or related fields. The list below is the running list of industry partners; there will still be opportunities to identify industry partners throughout the program engagement process.
2. **Conduct Outreach & Introduction.** Initiate outreach to potential industry partners through various communication channels such as emails, phone calls, or in-person meetings. Introduce SURGE, explain its objectives, and highlight the potential benefits of collaboration. Send SURGE Media Kit so they can share SURGE resources with contractors they are in contact with. Clearly articulate how industry partners can contribute to and benefit from the initiative.
3. **Collaborate and Plan.** Collaborate with industry partners to develop joint plans and strategies for outreach and education. This may involve joint events, shared

resources, or coordinated outreach efforts. Ensure that the collaboration aligns with the mutual interests of both parties and contributes to the overall success of SURGE.

4. **Maintain Ongoing Communication.** Establish and maintain ongoing communication channels with industry partners. Keep them informed about SURGE updates, milestones, and any relevant industry developments. Actively seek their input, feedback, and suggestions to ensure a mutually beneficial and sustained partnership. Regular monthly or quarterly check-ins and updates contribute to a positive and enduring relationship.

2025 Partnerships & Collaboration Updates

1. In April 2026, SURGE co-hosted an AB 2143 Informational Webinar with the Department of Industrial Relations (DIR). There were 243 registered attendees.
2. [Western Electrical Contractors Association, Inc.](#) included a News Detail on their website with AB 2143 related information from SURGE. See image below. SURGE is adding them to the industry partners list.

The screenshot shows the WECA website's news detail page. The header includes the WECA logo, the text "Western Electrical Contractors Association, Inc.", and a navigation menu with items like "Political Advocacy", "Forms & Resources", "Certification and Exam Preparation", and "Careers". A search bar and social media icons are also present. The main content area features a "News Detail" section with a breadcrumb trail "News and Events > News Detail". The article title is "Have Questions About AB 2143?" dated "Thursday, May 1, 2025". The text states: "Get Answers Within, Content Courtesy of California Public Utilities Commission's Solar-Utilities Reporting, Guidance, and Education (SURGE) Program". Below the text is a SURGE logo and a link to "Content courtesy of SURGE". The article discusses frequently asked questions about AB 2143 and certified payroll submission, providing a definition of a public works project under AB 2143 and a link to the full text.

3. SURGE developed an AB 2143 Media Kit and shared it with the list of solar organizations below. The Small Business Utility Advocates were the only organization to confirm receipt of the information.

The activity for Partnerships and Collaborations has been minimal, however, SURGE plans to revamp this area for 2026. Based on lessons learned in prior years, for 2026, SURGE will focus on improving the following areas:

- **Expanding Industry Partners:** Identify additional solar organizations and associations to reach a larger pool of impacted contractors and vendors.
- **Increase Outreach Efforts:** Actively follow-up with organizations that have not responded to our communications and establish clearer expectations and engagement with organizations.
- **Enhance Information Sharing:** Create and share timely, ready-to-share materials to ensure consistent and accurate information on AB 2143 compliance requirements.

Below is the list of preliminary partners and respective websites.

Industry Partners*	Website
Department of Industrial Relations (DIR) Labor Commissioner's Office	www.dir.ca.gov
California Solar & Storage Association	www.calssa.org
Solar Energy Industries Association	www.seia.org
Agricultural Energy Consumers Association	www.agenergyca.org
California Farm Bureau Federation	www.cfbf.com
Small Business Utility Advocates	www.utilityadvocates.org
California Building Industries Association	www.cbia.org
California Energy Storage Association	www.storagealliance.org
Independent Energy Producers Association	www.iepa.com
Rising Sun Center for Opportunity	www.risingsunopp.org
GRID Alternatives	www.gridalternatives.org
Western Electrical Contractors Association, Inc.	www.goweca.com

*Additional partners may be identified as the program progresses.

Promotion and Outreach

The plan to conduct widespread promotion and outreach for SURGE includes employing tailored strategies across various electrical corporation territories to ensure maximum reach and engagement. Recognizing that each region represents a diverse population, the plan targets specific areas and incorporates both digital and in-person approaches.

- Pacific Gas and Electric
- Southern California Edison
- San Diego Gas and Electric

Outreach Database

The SURGE outreach database consists of contact information shared by Investor-Owned Utilities. (Pacific Gas and Electric, Southern California Edison, and San Diego Gas and Electric) portals that house interconnection application information.

The outreach database allows SURGE to send outreach communications to the entire list or a specific utility territory. The outreach database is maintained and updated by removing duplicative contact information and including new contractors identified through other means, such as outreach event attendance.

In 2025, the outreach database yielded significant results in identifying contractors subject to AB 2143 and PUC 769.2, primarily through our collaboration with the Investor-Owned Utilities (IOUs) and the utilization of their portals, which provided access to contractor interconnection applications. This approach allowed us to effectively streamline our outreach efforts, enabling us to reach contractors who may have otherwise gone unrecognized. By leveraging the data available in the IOUs' systems, we successfully identified a substantial number of contractors subject to AB 2143, ensuring they received timely information and support related to compliance requirements. Additionally, the outreach database is more representative of the targeted stakeholders that SURGE was aiming to reach. In 2026 and moving forward, SURGE will explore how to leverage IOU databases to ensure that the most up-to-date information on contractor activities and project statuses are identified.

Distribution & Display of Materials

To ensure that education materials will be effectively distributed across targeted territories, the following outreach strategies will be integrated:

- **Utilize Website as SURGE Outreach Material Hub.** The SURGE website will act as a hub with all outreach materials and information needed that can be shared to all targeted territories. Label and identify which outreach materials and information are designated specifically for contractors subject to AB 2143 and PUC 769.2 or can be used generally. Maintain an archive of original digital library for easy retrieval of information.

- **Leverage Partnerships to Disseminate Information.** After establishing partnerships with industry associations and other relevant organizations, SURGE information will be shared with these entities to disseminate information to their respective networks.

Other strategies may be identified as the plan progresses and these will be brought to the attention of the CPUC Project Manager as a proposal to enhance outreach efforts.

Endorsement at Community or Industry Events

Participation at in-person and virtual community or industry events will be approached with strategic intent to bring awareness to SURGE. Research will be conducted to identify industry-specific events that align with SURGE outreach goals. These events may include conferences, virtual workshops, seminars, or other community events that attract the target audience to provide opportunities for engagement. Additionally, outreach (email, phone, or word-of-mouth) will be conducted to industry experts and organizations to inquire about potential events to participate in and make valuable connections. This initiative recognizes the value of direct engagement with stakeholders and also establishes a thoughtful strategic approach to ensure effective utilization of resources.

- **Target Events.** Events will be strategically selected based on relevance, attendance demographics, and potential impact on SURGE awareness. Additionally, guidance to attend specific events will be sought from the CPUC Project Manager. It is recommended to prioritize events that will attract significant representation of key stakeholders. In 2026, SURGE will continue to research in-person solar-related events where contractors who may benefit from SURGE information and are subject to AB 2143 and PUC 769.2 will be in attendance. For example, SURGE may attend the following in-person events:
 - LCPtracker Ignite Conference 2026
- **Outreach Exhibit Tables.** Outreach exhibit tables will be used at any in-person solar industry related events, such as solar association events or conferences. Participating as an outreach exhibitor can play a pivotal role in fostering direct engagement, sharing information, and building community awareness. If possible, tables with outreach materials will be placed at community or industry events along with staff who are knowledgeable and well-versed in SURGE requirements and information. Displays with clear signage, banners, and other graphics that convey the key messages of AB 2143 will be created. These outreach exhibit tables can also contribute to the goals and objectives established by the SURGE Outreach and Education Plan by facilitating community connection and feedback collections during specific engagements.

Feedback Mechanisms

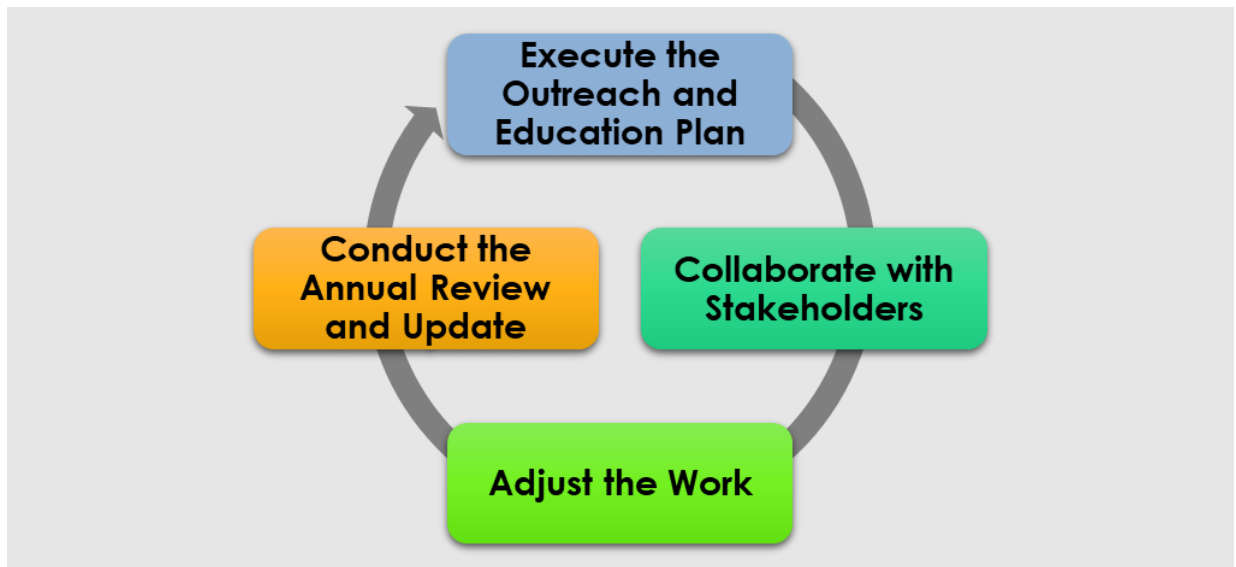
The SURGE Outreach and Education Plan includes robust feedback mechanisms as part of the objective to foster an open dialogue with key stakeholders. These mechanisms are designed to engage with key stakeholders and provide them with avenues to express concerns, seek clarification, and contribute valuable insights to enhance outreach initiatives.

- **Help Line.** A dedicated help phone line has been established to facilitate direct communication between contractors and knowledgeable representatives. Key stakeholders can utilize the help line for immediate assistance with questions, concerns, or clarifications related to SURGE. This direct line of communication aims to provide key stakeholders with timely and accurate information.
- **Email Inquiries.** Stakeholders are encouraged to reach out through the provided email address for written correspondence. Emails provide a traceable record of inquiries, allowing for thorough responses to ensure that all questions are adequately addressed.
- **Chat Interface on Website.** The website features a simple, user-friendly chat interface that can provide real-time assistance for pre-prompted inquiries. Contractors can seek instant clarification on commonly asked questions or guidance through the chat interface. However, if issues are unresolved, the chat interface will prompt the contractors to call or email SURGE support at info@cpucsurge.org.
- **Virtual Webinars and Workshops.** The SURGE Team hosts virtual informational AB 2143 webinars and compliance workshops throughout the year. These are intended to provide foundational background and context on AB 2143, and keep contractors up to date on compliance processes and requirements. Contractors have the opportunity to make comments and ask clarifying questions through the Q&A feature on the webinar, and each question/comment is answered by the SURGE team verbally during the webinar, and through the Q&A document that is released and posted to the website after the webinar.

Monitoring and Evaluation

Effective monitoring and evaluation are fundamental components of the SURGE Outreach and Education Plan, ensuring the achievement of goals and objectives and promoting continuous improvement. The exhibit below shows the four phases that will be employed to support the monitoring and evaluation of the plan. Additionally, key performance indicators (KPIs) have been developed to quantitatively measure the degree of success for each goal and objective.

Four Phases Approach for Monitoring and Evaluation



1. Execute the Outreach and Education Plan

The initial step to monitor and evaluate the effectiveness of the SURGE Outreach and Education Plan involves implementing the planned activities in the strategy. The project team is responsible for executing the plan and ensuring that the activities align with defined goals and objectives, utilize appropriate resources and tools, and adhere to established timelines. Regular progress checks and coordination meetings among team members are essential during this phase to maintain alignment with the plan's goals and objectives.

2. Collaborate with Stakeholders

Effective collaboration with SURGE stakeholders is a continuous and integral aspect of the monitoring and evaluation process. This step involves engaging with various parties involved or impacted by SURGE. Regular monthly or as-needed communication, feedback sessions, and collaborative decision-making contribute to a more comprehensive understanding of SURGE regulations and requirements. Stakeholder collaborations ensure that the execution of the plan remains responsive to the evolving needs of each stakeholder.

3. Adjust the Work

This phase is critical to the iterative nature of the monitoring and evaluation process. As work progresses and more data and information are analyzed, adjustments to outreach strategies, tactics, or specific activities may be necessary. This phase involves making informed modifications based on insights gained from the monitoring process, stakeholder feedback, and evaluation findings based on KPIs. Adaptability and willingness to course correct are essential to ensure that the plan remains effective and aligns with the evolving landscape of AB 2143 regulatory requirements.

4. Conduct the Annual Review and Update

Regular reviews and updates are essential to maintaining the relevance and effectiveness of the plan. The annual review will involve a more comprehensive assessment of the plan's performance, and this is described in the section entitled "Annual Update & Reporting." This phase involves evaluating the impact of outreach activities, analyzing stakeholder feedback, and assessing the achievement of goals and objectives. Based on these findings, the plan will be updated to incorporate lessons learned, address challenges, and integrate other areas for improvement. The annual review and update process will ensure that the plan remains a dynamic and responsive tool for the outreach and education for SURGE.

Key Performance Indicators

Key Performance Indicators (KPIs) are measurable and quantifiable metrics that organizations use to evaluate and assess their performance in achieving specific goals and objectives. The following KPIs will be adapted and tailored to each specific goal and objective as applicable. KPIs provide a way to measure progress, monitor success, and identify areas that may require improvement. They serve as benchmarks for performance, helping CPUC align outreach and education activities with strategic objectives and make data-driven decisions. Adjustments may be made to align with the nature, scale, and goals/objectives of the SURGE Outreach and Education Plan. Additional KPIs may be identified throughout the life of the plan.

Area	KPI Metrics	2025 Results
Goal & Objective Attainment	<ul style="list-style-type: none"> ✓ Percentage of achieved goals compared to the planned objectives. <ul style="list-style-type: none"> ○ Activity Completion ○ Objective Met 	<ul style="list-style-type: none"> ✓ 16 Total Outreach Activities listed in 2025 Goals & Objectives ✓ 9 or 56% Completed Activities ✓ 4 or 25% Ongoing or In Progress Activities ✓ 3 or 19% Not Started Activities
Stakeholder Engagement	<ul style="list-style-type: none"> ✓ Number of stakeholders actively engaged in project activities. 	<ul style="list-style-type: none"> ✓ Event Attendees: 485 ✓ Survey Respondents: 12 ✓ Website Sign Ups: 38 ✓ Website Questions: 26 ✓ SURGE Compliance Portal ("Accepted" Status) as of 10/31/25 <ul style="list-style-type: none"> ○ Contractor Registration: 510 ○ Project Registration: 586 ○ Certified Payroll Submissions: 2,042
Outreach Effectiveness	<ul style="list-style-type: none"> ✓ Percentage increase in awareness or knowledge among the target audience. <ul style="list-style-type: none"> ○ Website Traffic ○ Page Views ○ Phone, Email, & Chat Engagements 	<ul style="list-style-type: none"> ✓ Website Traffic/Page Views: Between 1/1/25 to 10/31/25, the SURGE website received over 18.1K views and 7.5K visitors. ✓ Phone Calls: An average of 270 calls per month. Over 1800 calls total. ✓ Emails: An average of 79 emails received per month. Over 800 emails total.
Participation Rates	<ul style="list-style-type: none"> ✓ Percentage of stakeholder participation in events, surveys, or feedback sessions. <ul style="list-style-type: none"> ○ Event Attendance (At least 50% of registered attendees are participating) ○ Surveys Completed/Feedback Received (At least 10% of surveys completed) 	<ul style="list-style-type: none"> ✓ SURGE hosted 4 webinars/workshops with 702 registered and 485 attended (69% participation rate). ✓ SURGE hosted 2 focus groups with 20 registered and 14 attended (70% participation rate). ✓ SURGE sent out 1 survey for AB 2143 Outreach and Education feedback. 12 stakeholders responded to the survey.
Timeliness	<ul style="list-style-type: none"> ✓ Adherence to established timelines for project milestones and deliverables. <ul style="list-style-type: none"> ○ Percentage of milestones completed, in progress, or not started. 	<ul style="list-style-type: none"> ✓ 13 Total Milestones ✓ 9 or 69% Milestones Completed ✓ 2 or 15% Milestone In Progress ✓ 2 or 15% Milestone Not Started
Feedback Response Times	<ul style="list-style-type: none"> ✓ Average time taken to respond to stakeholder feedback or inquiries. (All inquiries responded to within 1-2 days.) 	<ul style="list-style-type: none"> ✓ The average time taken to respond to stakeholder feedback or inquiries is approximately 1.5 days.

Accessibility <ul style="list-style-type: none">✓ Evaluation of how accessible project information and resources are to the target audience.<ul style="list-style-type: none">○ Number of Translation Requests○ Number of Translated Documents	<ul style="list-style-type: none">✓ No Translation Requests✓ No Translated Documents
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Annual Update & Reporting

The SURGE Outreach and Education Plan is designed to be a dynamic and responsive framework that evolves with input from CPUC and key stakeholders. This collaborative approach ensures that the plan will stay effective, relevant, and aligned with the evolving needs of the industry.

Annual Plan Update

The plan will undergo an annual review and update process, incorporating feedback and input from CPUC and key stakeholders received from feedback channels. The goal for this is to refine the strategies in place, improve outreach methods, and address emerging challenges. The update will commence towards the end of each calendar year, allowing for the integration of lessons learned and adjustments.

The SURGE Team implemented a two-week public comment period for the O&E Plan 2026, which was open from January 23, 2026, through February 6, 2026. Two (2) e-blast communications were distributed on January 23, 2026, and February 3, 2026, to notify stakeholders of the opportunity to provide feedback. No public comments were received during the comment period.

Annual Plan Focus Groups

To enhance transparency and foster a collaborative communication channel, the SURGE team hosted two focus groups to gather feedback to inform the updates to the Outreach and Education Plan for the following year and address issues that members of the public raise. The focus groups encourage the active participation of the key stakeholders and other relevant parties or organizations. SURGE offered \$20 gift cards as to active participants as incentives. SURGE also limited the number of attendees to no more than 10 people per focus group. The next focus groups will occur in late November and early December 2026.

The key takeaways from the Focus Groups were the following:

- There is still some contractor confusion regarding reporting requirements and a lack of general contractor awareness.
- Suggestions include more training and webinars (specifically with the DIR), written walkthrough documents, and a list of the questions that will be asked during the portal registrations and submissions.
- The most helpful resources were live training sessions, the recorded walkthrough videos, the SURGE phone line, weekly email outreach, and the FAQ page on the SURGE website.

SURGE looks to utilize these takeaways to improve outreach and education efforts in 2026. The full summary of the Focus Groups can be found in Appendix F.

Annual Plan Reporting

Following each SURGE Outreach and Education Plan workshop, a comprehensive summary report will be generated, capturing key points discussed during the meeting. The insights gained from the annual workshop and ongoing feedback will be instrumental in refining the plan. In addition, actionable recommendations and areas of improvement will be incorporated into the plan to contribute to continuous enhancement. Please see public comments from the 2025 development of the Outreach and Education Plan in Appendix F.

Annual Outreach Survey

SURGE prepared an annual outreach survey to contractors and stakeholders for AB 2143 and PUC 769.2. The survey is designed to gather feedback from contractors, stakeholders, and partners involved in the SURGE initiative. This survey aims to assess the effectiveness of our outreach and education efforts regarding AB 2143 and PUC 769.2 compliance requirements. The key takeaways from the 2025 survey are as follows:

- Many respondents are looking for general information on AB 2143 and SURGE compliance, and how to get started in meeting the requirements.
- Suggestions included more DIR involvement, hosting more training/webinars, and creating a checklist for AB 2143 action items for contractors.
- Most respondents preferred to receive outreach communications via email, would go the SURGE website first if they have a question, and have attended at least one SURGE webinar in the past year.

The full summary of the survey can be found in Appendix F.

Appendix

Appendix A: SURGE Brand Guide

Appendix B: E-blast Messaging Template Example

Appendix C: Partnership & Collaboration Email Template

Appendix D: Event Email Template Example

Appendix E: Registration Page Template Example

Appendix F: Public Comments from 2026 Outreach & Education Plan Development

Appendix A: SURGE Brand Guide

BRANDING STYLE GUIDE

TYPOGRAPHY

FONT SPECIMEN Century Gothic ABCDEFGHIJKLMNOPQRSTUVWXYZ abcdefghijklmnopqrstuvwxyz	HEADER TEXT WEIGHT (Size 16, Bold) Century Gothic SUBHEADER TEXT WEIGHT (Size 14) Century Gothic NORMAL TEXT WEIGHT (Size 11) Century Gothic
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COLOR GUIDE

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LOGO

TRANSPARENT BLACK LOGO 	WHITE LOGO ON BACKGROUND 	LOGO BACKGROUND (MEDIA)
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WEBSITE

Home Page: 	Content Pages:
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Appendix B: E-blast Messaging Template Example



Dear Solar Contractor,

Have questions about the registration process for the SURGE Compliance Portal? The SURGE Team has created short, thorough walkthrough videos to help streamline the registration and submission process for AB 2143 contractors.

Take a look:

[Contractor Registration](#)

[Project Registration](#)

[Certified Payroll Submission](#)

These videos provide a step-by-step guide for contractors who need to register themselves or their applicable project on the SURGE Portal. There is also a video on how to complete certified payroll submissions through the Portal.

The December 31st deadline to submit certified payrolls is fast approaching, and staying up to date on your registrations and payroll submissions will help prevent any compliance issues or holds on your AB 2143 projects.

Important Note: If you received this email but do not perform construction work or pay prevailing wages, please forward this notice to the appropriate party (e.g., your Prime Contractor). Contractors performing work covered under AB 2143 and PUC §769.2 must pay prevailing wages and submit certified payroll records to the California Public Utilities Commission (CPUC) via the SURGE Compliance Portal.

For more information and resources, please visit the SURGE website at www.cpucsurge.org.

If you have additional questions, please feel free to contact the SURGE Support Team at info@cpucsurge.org or 1-800-549-2143.

Best regards,

The SURGE Team

Solar-Utilities Reporting, Guidance, and Education (SURGE) | 3525 Hyland Avenue, Suite 140 | Costa Mesa, CA 92626 US

[Unsubscribe](#) | [Update Profile](#) | [Constant Contact Data Notice](#)

Appendix C: Partnership & Collaboration Email Template

SURGE Media Kit: Email to Solar Organizations

Subject Line: AB 2143 Outreach and Education

Hi [Solar Org. Rep.],

My name is [Insert Name], and I'm part of the Solar-Utilities Reporting, Guidance, and Education (SURGE) initiative directed by the California Public Utilities Commission (CPUC).

I'm reaching out to share important information about Assembly Bill 2143 (AB 2143) and Public Utilities Code Section 769.2 (PUC 769.2)—legislation that went into effect last year on January 1, 2024. These regulations require contractors working on qualifying renewable energy facility projects to pay prevailing wages.

SURGE was launched to help solar contractors understand and meet these compliance requirements. Over the past year, we've found that many contractors are still unaware of the law and its requirements. To support awareness efforts, we've developed a media kit designed specifically for solar organizations and networks like yours.

The media kit includes:

- **SURGE Contractor Resource Flyer** – A one-page overview of AB 2143 / PUC 769.2 and available resources.
- **SURGE Graphics** – Shareable graphics for social media or newsletters.
- **SURGE Email Template** – Ready-to-use language to communicate important updates to your members.

We encourage you to share these materials with your network to help contractors stay informed and in compliance.

Additionally, our team is available to speak at your upcoming meetings or events. If you're interested in hosting a SURGE speaker to provide an overview of AB 2143 and PUC 769.2, please reach out to us at outreach@cpucsurge.org.

Thank you for helping us spread the word and support California's solar workforce!

[Insert Signature]

Appendix D: Event Email Template Example



Focus Groups for SURGE AB 2143 Outreach & Education Efforts

Join the SURGE Team for a small focus group to help us improve the outreach and education efforts for the California Public Utilities Commission (CPUC) Solar-Utilities Reporting, Guidance, and Education (SURGE) initiative.

Below are the two (2) opportunities to participate and you only need to sign up and attend one session:

<p><u>Focus Group 1</u></p> <p>Date: Thursday, November 20, 2025</p> <p>Time: 12:00 - 1:00 PM (PST)</p> <p>Location: Microsoft Teams Webinar</p> <p>SESSION IS FULL</p> <p>Registration Closed</p>	<p><u>Focus Group 2</u></p> <p>Date: Monday, December 1, 2025</p> <p>Time: 5:00 - 6:00 PM (PST)</p> <p>Location: Microsoft Teams Webinar</p> <p>Seats Available: 3 Seats Left</p> <p>Register for Focus Group 2</p>
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Important: Please note that these focus groups are tailored specifically on the outreach, education, and communication efforts of SURGE over the past year: what worked well, what didn't, and what resources would better help you in the future. The discussion is **not about AB 2143 compliance** requirements. We simply want your feedback on how we can better serve and inform contractors like you.

To keep the discussion productive, participation is limited to 10 individuals per focus group.

Focus Group Participation Incentive: \$20 Amazon Gift Card

As a thank-you for your time, each participant will **receive a \$20 Amazon gift card after successfully participating in the focus group.**



The SURGE Team will coordinate with each participant after the focus group has been completed to send out the gift cards.

Unable to Attend? Take this Survey!

If you are unable to participate in the Focus Group, we encourage you to take this survey and provide your feedback by December 1st.

[Outreach and Education Survey 2026](#)

If you have additional questions about this Focus Group, please contact Brittany Yamagata at outreach@cpucsurge.org.



Best regards,

SURGE Support Team

Solar-Utilities Reporting, Guidance, and Education (SURGE) | 3525 Hyland Avenue, Suite 140 | Costa Mesa, CA 92626 US

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Appendix E: Registration Page Template Example



Informational Webinar

SURGE Informational Workshop for AB 2143

Details

Join us on Tuesday, October 28, 2025 at 11:00 AM for an informative webinar for the Solar-Utilities Reporting, Guidance, and Education (SURGE) initiative directed by the California Public Utilities Commission (CPUC). SURGE is the official platform for AB 2143 reporting and contractor support. This webinar is designed to provide solar contractors with essential guidance on navigating compliance requirements under AB 2143/PUC 769.2 which includes prevailing wages and certified payroll reporting.


For more information about SURGE, please visit our website at www.cpucsurge.org. Additionally, if you have any questions about the event, please feel free to email outreach@cpucsurge.org.

Register


This event has passed.

- Tue, Oct 28
- 11:00 AM - 12:00 PM PDT
- Online event


Speakers (5)




Ariana Fernandez
SURGE Sr. Prevailing Wage Cons...




Sylvia Linn
SURGE Project Manager



Christina Salcedo



Brittany Yamagata



Amber Murakami-Fester
CPUC Program Manager

[Microsoft Privacy Policy](#)

This event is powered by Microsoft Teams, under the direction of the meeting organizer. The data processing that occurs for purposes of this event is subject to the terms of the meeting organizer.

Appendix F: Public Comments from 2026 Outreach & Education Plan Development

The following is a summary of public comments received from solar contractors and interested stakeholders through the outreach survey and the focus group discussions:

SURGE Outreach and Education 2026 Survey Responses

Introduction

The SURGE Outreach Team released the SURGE Outreach and Education 2026 Survey on Oct. 16, 2025. The Survey was advertised through the regular SURGE Monthly Outreach Emails and was also sent specifically to attendees of the SURGE Outreach and Education Focus Groups, which took place on November 12th and December 1st. This resulted in a total of 12 survey responses which have been summarized below. These responses will help inform the outreach and education efforts of the SURGE Program for 2026.

Please note that some responses and questions (such as name, organization, etc.) have been omitted from the summary in order to maintain the anonymity of the survey participants.

If you have questions regarding the survey or SURGE's outreach and education resources, please email the Outreach Team at outreach@cpucsurge.org.

Upcoming Events:

- Click here to view a list of SURGE events: <https://cpucsurge.org/happenings/>
- Click here to view a list of DIR events: <https://www.dir.ca.gov/Public-Works/SupportCenter.html>

Resources:

- [SURGE Website](#)
- [SURGE Compliance Portal](#)

Survey Questions and Responses

1. Survey Participant Roles:
 - Accountant
 - CEO
 - Sr. Staff Accountant
 - Contractor
 - Project Coordinator
 - Owner/President
 - Compliance Manager
 - Accounts Receivable / Billing
 - Project Owner
 - Payroll Manager / Labor Compliance
 - Finance Admin
 - Labor Compliance Manager

2. How Survey Participants Heard About the SURGE Program:
 - Solar Organization (x4)
 - SURGE Website (4x)
 - Word of Mouth (2x)
 - Government Organization (1x)
 - Other: I do certified payroll (1x)
 - Social Media: None

3. How Many SURGE Webinars/Workshops Have You Attended in the Past Year?
 - 0: 3
 - 1-2: 5
 - 2-3: 4

4. Have You Visited the SURGE Website at www.cpucsurge.org?
 - Yes, I use it frequently: 4
 - Yes, I've visited the site a few times: 8
 - No: 0

5. What Information Are You Looking for When it Comes to AB 2143?
 - Most respondents mentioned that the main thing they are looking for when it comes to AB 2143 is compliance assistance. This included more information on how to make sure they are in compliance with AB 2143, guidance and regulation information, overall compliance requirements, and assistance on project-specific questions where AB 2143 compliance is not clear based on existing guidance. There was also a scenario-specific question regarding project funding updates and reporting payrolls.

- Other respondents mentioned they were looking for information to help them prepare and understand what to do when they get public works projects.
 - Another response mentioned more general information regarding AB 2143 and the SURGE Program.
 - Another respondent mentioned they are looking to understand how a project is deemed AB 2143, and how the SURGE website works.
6. What Recommendations Do You Have to Improve Outreach and Education Efforts for AB 2143?
- Some of the respondents did not have any suggestions for improvements to the SURGE Program's Outreach and Education efforts.
 - Other suggestions included more DIR involvement, increasing engagement and streamlining the process, and clarification on project-specific questions.
 - Many respondents requested that SURGE host more trainings to make contractors aware of what they need to do, and to provide more time for Q&A. Another request was for different levels of webinars (beginner, advanced, etc.).
 - More suggestions were for quicker responses to outreach help, and more diverse project scenarios in the FAQ section of the website.
7. Do You Receive SURGE Outreach Emails?
- Yes: 10
 - No: 2
 - I don't know: 0
8. What is Your Preferred Method of Receiving Outreach and Program News? (Select all that apply)
- Email: 11
 - Monthly Newsletters: 3
 - Webinars: 2
 - Social Media: 0
 - Other: 0
9. What is Your Preferred Frequency of Receiving Outreach?
- Once a week: 1
 - Twice a month: 7
 - Once a month: 4
10. If You Have a General (not project specific) Question Related to AB 2143, What Are You Most Likely to Do First?
- Visit the SURGE Website: 8

- Email the SURGE Team: 1
- Call the SURGE Phone Line: 1
- Other: 2

11. Which of the Following SURGE Resources Are You Aware of? (Select all that apply)

- Email List: 4
- Phone Line: 3
- Webinar Recordings: 6
- FAQs page on the SURGE Website: 2
- SURGE Fact Sheets and Flyers: 0
- Compliance Portal Registration and Payroll Submission Walkthrough Videos: 1
- All of the Above: 5
- None of the Above: 2

12. Please Share Any Additional Comments, Suggestions, or Feedback Regarding the SURGE Outreach and Education Effort:

- Some of the respondents did not have any additional comments, suggestions, or feedback for the SURGE outreach and education efforts.
- Specific suggestions included the following:
 - Make it more efficient for contractors to easily update start and end dates for registered projects. The current method is inefficient and requires too much back and forth.
 - More detail on how to handle reporting when a subcontractor is removed from a project, and how to report direct labor cost on those types of cancelled projects.
 - Create a checklist for action items that contractors can follow, and list the questions that will be required when registering a project, prime, and/or subcontractor.
- Other suggestions included hosting more workshops and more DIR involvement.

Introduction

- In preparation for the 2026 AB 2143 Outreach and Education Plan update, the SURGE Team hosted two small focus groups on Thursday, November 20, 2025, and Monday, December 1, 2025 via Microsoft Teams Webinar.
- The focus groups covered three main outreach topics:
 - General Outreach and Education
 - Resources
 - Communication
- Time was also allocated for Open Discussion and Questions.
- The focus groups had a maximum capacity of 10 attendees, and there were 8 attendees at the November 20th focus group, and 6 attendees at the December 1st session. Participants only needed to attend one of the focus groups.
- Each attendee that actively participated and provided their insights was sent a \$20 Amazon gift card after the focus group as a thank you for their time.
- The feedback from the focus groups will help provide valuable information to draft the goals and objectives for the SURGE Outreach and Education Plan for 2026.
- Please note that some responses and questions in the summary have been slightly re-worded to maintain the anonymity of the participants.

General Outreach and Education

The questions asked by the SURGE Team regarding **General Outreach and Education** focused on the following: challenges in understanding and/or meeting AB 2143 requirements, how to make outreach and education efforts more effective, and how to make compliance easier and/or clearer.

- Challenges:
 - There are some scenarios and project-specific questions that they think would be helpful to include on the website, because trying to figure them out on their own was difficult.
 - Lack of general contractor awareness of AB 2143 compliance requirements. This causes issues with project registration and compliance, as well as holding up other jobs they are working on.
 - Setbacks with the Department of Industrial Relations (DIR) and difficulty in registering with them.
 - Lack of understanding of the AB 2143 process and responsibilities for primes, subcontractors, and awarding bodies. Particularly when it comes to getting the Awarding Body to register the project.
 - Some of the form questions are confusing, there is a lack of communication when it comes to approval and what needs to be

fixed in order for a submission to be compliant. There were also questions about reporting final payrolls and compliance extensions when changes need to be made to submissions.

- Suggestions for compliance communications:
 - Year-round trainings with more subjects and specific scenarios covered in the trainings. Clearer instructions for registrations and how to manage DIR issues without projects being put on hold would also be helpful.
 - Working with the Utility Companies to provide education and notices about needing to pay prevailing wage and what those requirements entail. Especially for smaller contractors who don't understand the processes.
 - Make it easier for contractors to get into submissions on the portal and make updates/edits without a lot of back and forth. Remove the requirement for project start and end dates, as these often change. AB 2143 is just one part of the overall project, reducing the back and forth will help streamline things.
 - Have SURGE use the same forms the DIR does so that they don't have to revise every submission for SURGE.

Resources

The questions asked by the SURGE Team regarding **Resources** focused on the following: what resources are most helpful, how effective have the webinars and workshops been, opinion on the weekly email updates, opinion on the SURGE website, and which outreach methods have been the most valuable.

- Helpful resources:
 - Live sessions like the Focus Groups
 - SURGE and DIR websites
 - SURGE phone line
 - Step-by-step videos and written instructions
 - FAQ page on the SURGE website
 - Webinar recordings
- Most attendees like the webinars and the fact that they are live, not pre-recorded. It was specifically mentioned that having a DIR representative was very helpful and was something they appreciated.
 - Suggestions for webinars:
 - More Q&A time
 - Host more of them (including ones with DIR representatives in attendance)
 - Spending time answering project-specific questions

- Have different webinars for different AB 2143 education levels (beginner, advanced, etc.) as the information can get a little repetitive.
- Most participants like the weekly e-mails. They find the content information and provides helpful reminders, and weekly is a good frequency for them.
- There were mixed opinions on the SURGE website. Some found it very user friendly and easy to navigate without being overwhelming. Others found it difficult to navigate at first and were worried about entering information incorrectly, but once they got the hang of it, it was easy to use. They did also mention the resources were slightly overwhelming, and it's a little tedious that you have to leave the website to go to the Compliance Portal.
- Many respondents said they like the webinars as an outreach method. They also mentioned that flyers tend to get lost in their e-mail inbox, and they would appreciate a chat feature. Others also like the weekly e-mails and being able to use the phone line. One suggestion was to include an "Important Notices" section on the website for any updates.

Communication

The questions asked by the SURGE Team regarding **Communication** focused on the following: what (if any) difficulties have they encountered using the compliance portal, do you notice and receive the portal messages, and what is your preferred way to receive support?

- Difficulties with the portal:
 - Initially difficult to get to/navigate, but became easier once they got used to it
 - Would like to be able to upload what they have for payroll submissions if they are waiting on the DIR.
 - Issues with getting the owner to register with the DIR as an Awarding Body, prime contractors not being involved in the solar portion of the project but having to be the one to register the project in SURGE, and confusion about the responsibilities for different roles in the Portal.
- Suggestions for the portal:
 - Make a list of questions that will be asked on the registration/submission forms so that they can prepare.
 - Make a step-by-step walkthrough document for each Portal registration/submission type.
 - Have an initial question that asks if they are the prime or the subcontractor, and then they automatically get redirected to the form they need to fill out based on their response to that question.
- Most attendees said they do not go directly to the Compliance Portal to check for messages but rather receive the messages through their e-mail and

- use that link to check the portal messages. All respondents said they would prefer communications to be done through e-mail.
- Most participants preferred support through a combination of e-mails and the phone line, but there were multiple participants who said they would suggest a chat feature and/or a ticket system.

Open Discussion or Any Questions

- **DIR/SURGE Connections**

- Respondents mentioned that the differences in DIR and SURGE payroll submission requirements are time consuming and can be frustrating. There were requests for integration between DIR and SURGE submissions.
- They also requested that more events be hosted with the DIR (and that SURGE host more events in general with plenty of time for Q&A).
- Long wait times to hear from the DIR cause delays in submitting to SURGE, and respondents are looking for ways to maintain compliance with SURGE when this happens

- **Compliance Portal**

- Respondents mentioned that having prominent labels on submissions in the portal (like "Outstanding," "Pending," etc. would be helpful.
- There were questions about anticipated turnaround time for SURGE to review a submission, as well as questions about what is due to SURGE by the end of the year.