

Statewide Low- to Moderate-Income Portfolio Stakeholder  
Webinar  
December 15, 2022  
2:30 PM – 4:30 PM  
Summary Report

Filed: January 19, 2023  
Case 18-M-0084  
Case 14-M-0094

Pursuant to New York Public Service Commission Order Adopting  
Accelerated Energy Efficiency Targets  
and  
Order Authorizing Utility Energy Efficiency and Building  
Electrification Portfolios Through 2025

## 1. Introduction

To provide an update on the development and implementation of the Statewide Low- to Moderate-Income (“LMI”) Portfolio (“Portfolio”),<sup>1</sup> NYSERDA and the Utilities<sup>2</sup> (collectively, “Program Administrators”) hosted a webinar for stakeholders on December 15, 2022.<sup>3</sup> The objectives were to provide stakeholders with an update on the continued development of the Statewide LMI Portfolio and to solicit stakeholder feedback. A PowerPoint presentation, filed in conjunction with this report, was given at the stakeholder webinar, and stakeholders were provided with several opportunities to ask questions and provide comments. At the end of the webinar, stakeholders were encouraged to submit any further comments, questions, or suggestions directly to the presenters, whose email addresses were displayed in the slides, or via the email address LMIForum@nysERDA.ny.gov.

Questions and comments received during this stakeholder engagement webinar have been and will continue to be reviewed and considered by the LMI Joint Management Committee (“JMC”).<sup>4</sup> The Statewide LMI Portfolio will be aligned periodically based on a review of initiative performance and evaluations. Questions and comments raised by stakeholders will be used to inform the calibration of the Portfolio.

## 2. Presentation Details

**Title:** Statewide Low- to Moderate-Income Portfolio

**Date:** December 15, 2022

**Time:** 2:30 PM – 4:30 PM

**Location:** Webinar

### Moderator and Presenters:

Moderator:

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<sup>1</sup> Case 18-M-0084, In the Matter of a Comprehensive Energy Efficiency Initiative (“NE: NY Proceeding”), Order Authorizing Utility Energy Efficiency and Building Electrification Portfolios Through 2025 (issued January 16, 2020) (“2020 NE: NY Order”). Pursuant to the 2020 NE: NY Order, the New York State Energy Research and Development Authority (“NYSERDA”) and the New York Utilities (“Utilities”) (collectively, “Program Administrators”) on July 24, 2020, filed a statewide Low- and Moderate-Income (“LMI”) Implementation Plan (“Implementation Plan”). The Program Administrators have filed subsequent versions of the Implementation Plan, including the latest, Version 2, on August 15, 2022.

<sup>2</sup> The Utilities referred to herein are: Central Hudson Gas & Electric Corporation; Consolidated Edison Company of New York, Inc.; KeySpan Gas East Corporation d/b/a National Grid, The Brooklyn Union Gas Company d/b/a National Grid NY, Niagara Mohawk Power Corporation d/b/a National Grid (collectively “National Grid”); National Fuel Gas Distribution Corporation, New York State Electric & Gas Corporation; Orange and Rockland Utilities, Inc.; and Rochester Gas and Electric Corporation, (collectively, “Utilities”).

<sup>3</sup> The Commission required the Utilities and NYSERDA to host at least two stakeholder engagement sessions annually. NE: NY Proceeding, 2020 NE: NY Order, p. 101.

<sup>4</sup> *Id.*

Ben Davis, Concentric Energy Advisors

Presenters:

Annalyssa Sikorski – National Grid  
Kathryn Mammen – NYS Department of Public Service  
Dave Friello – NYSERDA  
Wasył Darmograi – National Grid  
Scott Oliver – NYSERDA  
Rachel Charow – Con Edison  
Samuel Pastrick – Con Edison  
Brian Cabezas – NYSERDA  
Emily Dean – NYSERDA  
Brittney Pietro – National Grid

### Agenda

- Welcome and Meeting Procedures
- Statewide LMI Portfolio
  - Context and Implementation Plan
  - NE:NY/CEF Interim Review
- Initiatives
  - 1-4 Family Homes Programs
  - Affordable Multifamily Energy Efficiency Program (AMEEP)
  - NYSERDA Partnerships with Affordable Housing Agencies
  - NYSERDA Regional Clean Energy Hubs
- Supporting Our Customers
  - Winter Heating Season
- Questions and Comments

### 3. Stakeholder Information

Invitations, which included stakeholder registration information for the webinar, were sent electronically to stakeholders who are listed on the Low-Income Forum on Energy email list. In addition, a meeting notice was posted on the Department of Public Service (“DPS”) Document and Matter Management website (“DMM”) on December 6, 2022. Due to continued COVID-19 concerns with respect to in-person gatherings, this session was held electronically via webinar.

Stakeholders attending the webinar included DPS Staff, human service and community-based organizations, advocates, local governments, contractors, installers, energy service companies (“ESCOs”), developers, consultants, and vendors.

There were 178 registrants. Over 100 individuals attended the webinar.

## 4. Review of Stakeholder Input

The Portfolio development and execution is expected to continue through 2025, and the Program Administrators expect the Portfolio to evolve. As programs are developed and calibrated, it is paramount to continue engaging with stakeholders, including requesting feedback and suggestions during the initial design and redesign of initiatives and services.

The topics, discussion, and comments received from this stakeholder meeting and subsequent stakeholder meetings have been and will continue to be referred to the appropriate workstream or the JMC for review.

Attendees were encouraged to submit suggestions by emailing the presenters directly, or via [LMIForum@nyscrda.ny.gov](mailto:LMIForum@nyscrda.ny.gov).

### Questions and Answers

There was a pause for Q&A after each section of the agenda, as well as a longer Questions and Comments section at the end of the webinar, where attendees were offered the opportunity to ask questions or provide comments. (Attendees were also invited to provide written questions at any time, which were addressed during the Q&A breaks.) The Program Administrators similarly provided numerous opportunities for attendees to offer questions and comments during the most recent prior webinar, in June 2022, and attendees seemed to respond well to the opportunity to ask questions directly after learning about a specific topic.

Numerous questions and comments were raised and addressed during the webinar. In some cases, stakeholders provided follow-up written questions and/or comments after an initial question was addressed by the JMC. For efficiency and clarity, the below summary reflects, as applicable, the verbal response provided during the Webex and/or additional responsive information being provided now for the first time.

- Q1. Is there an approximate date for the release of the Commission Order that will follow DPS Staff's Interim Review Whitepaper?
- A1. There is no definite timing that the Program Administrators or DPS Staff can provide at this time. There are several components that require compliance with the SAPA process, and by law the Commission cannot act until they have fulfilled that public comment period. If initial comments on the Interim Report are received in March, the Order could come anytime after those comments come in. That Order would establish the criteria that NYSERDA and the utilities would use to propose new programs, which would also undergo the same comment process. The overall timeline is iterative.
- Q2. When will the EmPower+ program become active? What are the planned income level tiers for EmPower+ and the associated rebate/incentive levels?

- A2. EmPower+ is expected to launch in early Spring 2023, depending on the launch of the new contractor portal. The program will have two tiers: Low and Moderate. The Low-Income tier will offer up to \$10,000 for a 1-4 family home, and the Moderate-Income tier will offer up to \$5,000 and a 50% match.
- Q3. With inflation impacting the dynamics of LMI/DAC mapping and definitions, how frequently is the eligibility criteria for LMI programs updated?
- A3. NYSERDA follows other state agencies such as OTDA in adhering to income guidelines issued by HUD every fall. The income guidelines have just been updated for the coming year within the last month. Approximately every November, the income guidelines are updated in accordance with HUD.
- Q4. How do the EmPower+ rebates interact with the NYS Clean Heat program rebates? Is a homeowner able to access both rebate programs?
- A4. As long as the rebate total across both programs does not exceed the project cost, homeowners can utilize both programs. A contractor would work with the NYSERDA program to determine which EmPower+ rebates are applicable, and would work separately with the NYS Clean Heat program to access those rebates.
- Q5. Is there a consolidated list available to the consumer that defines which programs are eligible for incentive stacking?
- A5. A specific list has not been compiled. Typically, incentives cannot be stacked, with a few exceptions. For example, in the past, DPS has indicated that incentives from NYS Clean Heat and EmPower can be combined. Additionally, AMEEP incentives can be stacked with Weatherization Assistance Program incentives. The NY Energy Advisor website is also a great resource for information about all of the EE programs available: <https://energyadvisor.ny.gov/>.
- Q6. Is there a document that explains the income verification process for EmPower?
- A6. The link included here will provide some guidelines around the income verification process. Navigate to "Submitting an Online Application" – Step 4 walks through the income eligibility screening: <https://knowledge.nyserdanyc.gov/pages/viewpage.action?pageId=99880833>.
- Q7. Is there an estimate of what share of total project costs is typically covered by AMEEP incentives?
- A7. The amount of total project cost covered varies by project; incentives typically cover between 30-70% of the project cost. On average, coverage hovers around 50%. AMEEP caps total incentives offered at 85% of total project costs.

- Q8. Regarding the sample projects highlighted in the slides, what were the costs associated with those projects in relation to the savings?
- A8. Costs typically range with the different types of measures. On average, measure incentives are kept below the unit costs that were ordered by the Commission. The Statewide LMI Implementation Plan shows the planned expenditures to achieve savings. Actual expenditures and associated savings achievement can be found in the Statewide LMI Annual Reports; the 2022 Annual Report is due April 1, 2023. The most recently filed Implementation Plan and Annual Report may be found on the NYSERDA Low- to Moderate-Income Stakeholder Resources website linked here: <https://www.nyserderda.ny.gov/All-Programs/Residential-and-Property-Owner-Income-Eligible-Programs/LMI-Stakeholder-Resources-New-Efficiency-New-York>. For quarterly program results, including actual program expenditures and energy savings, see the New York State Clean Energy Dashboard linked here: <https://www.nyserderda.ny.gov/Researchers-and-Policymakers/Clean-Energy-Dashboard/View-the-Dashboard>.
- Q9. National Grid paused issuing new commitment letters for downstate AMEEP projects. What is being done to make sure utilities have adequate funding in the future?
- A9. National Grid has been working on a process with their vendor to make sure they do not have to pause issuing commitment letters.
- Q10. Is there more information available about NYCHA's Clean Heat for All Challenge and the winning design for a window-unit ccASHP?
- A10. This press release provides more information about the results of this year's Clean Heat for All Challenge and the Challenge in general: <https://www.nyserderda.ny.gov/About/Newsroom/2022-Announcements/2022-08-02-Governor-Hochul-and-Mayor-Adams-Announce-Clean-Heat-for-All>.
- Q11. Is installing PV solar part of the incentives for multifamily housing that the program supports?
- A11. Solar PV incentives are not yet part of the incentives provided directly to affordable housing developers through HCR and HPD, but this is another priority outcome for 2023. Until then, affordable multifamily developers and owners can access solar PV incentives through the NY-Sun program: <https://www.nyserderda.ny.gov/All-Programs/NY-Sun/Solar-for-Your-Business/Solar-for-Multifamily-Buildings>.
- Q12. In NYC, how will the Regional Clean Energy Hubs be different from what the NYC Accelerator is already doing?

- A12. The NYC Accelerator provides resources, training, and one-on-one expert guidance to help building owners and industry professionals improve energy efficiency and reduce carbon emissions from buildings in NYC. The NYC Accelerator provides personalized technical assistance from energy efficiency experts.

The Regional Clean Energy Hubs will be a group of organizations forming a Hub that will not only provide awareness of and access to clean energy opportunities and solutions, but will also provide consumer uptake in clean energy programs including wraparound services that are non-energy related. Partnerships are also a large component of the Hubs; this includes creating partnerships with clean energy partners, affordable housing providers, non-energy partners, third-party funding providers, philanthropic organizations, etc. that result in scalable activities and projects.

Workforce Development is also a large component of the Regional Clean Energy Hubs. The Hubs will support career pathways for individuals currently residing in disadvantaged communities or from priority populations, through partnerships with training, education, and clean energy businesses for employment opportunities in the clean energy workforce.

## Key Takeaways

For additional context, the JMC is providing here a summary of key takeaways from the meeting, which incorporate both the questions and answers summarized above as well as the content presented by the Program Administrators and DPS Staff.

1. DPS Staff will be issuing an Interim Review report on the current state of the Energy Efficiency and Beneficial Electrification programs that are run by the utilities and NYSERDA. After the time of this webinar, the Interim Review report was released on December 20.
  - a. Stakeholders are welcome and encouraged to participate in the comment process on this report. Further instructions are included in the meeting notes and presentation slides.
2. The 1-4 family homes initiatives have made progress on several objectives in 2022:
  - a. The utility referral process among the utilities and NYSERDA for the EmPower program has been streamlined.
  - b. A new program workflow system is being developed to create efficiencies needed to scale the program.
  - c. Utility and NYSERDA staff have been working to launch surveys and increase customer touchpoints both electronically and via mail. For example, utility email campaigns have been sent to over 20,000 recipients with one of three distinct messages and have driven an incremental 170 applications to the program.

3. The EmPower program will transition to EmPower+ program in spring 2023. This transition will include the release of a single statewide contractor portal and statewide application. EmPower+ will replace both the existing EmPower and AHP programs.
4. The multifamily LMI program, AMEEP, launched in Q4 2021 and has been in the market now for one year. It has continued to refine criteria and guidelines for its Comprehensive and Non-Comprehensive project pathways. It has also successfully hosted 5 Participating Contractors and Industry Partners (“PC&IP”) webinars throughout the year, providing a platform to share updates and changes to the program while creating space for participating contractors and energy service providers to ask questions and interact with the Program Administrators.
  - a. Program administrators have also issued additional resources to clarify coordination between AMEEP and the FlexTech program.
5. NYSERDA and the utilities have also been coordinating partnerships with affordable housing agencies across the state, such as HCR, HPD, and NYCHA:
  - a. Partnership with HCR started in late 2021. Incentives are available through HCR’s financing RFPs for both new construction projects and adaptive reuse. The Program Administrators plan to continue working directly with HCR to support them as leaders in decarbonization of New York housing stock.
  - b. A similar partnership is in place with HPD. Statewide program incentives and technical assistance will be incorporated as part of the application process to HPD.
  - c. One particular partnership with NYCHA is the Clean Energy for All Challenge. The winners of this year’s challenge have developed a standalone window-unit ccASHP that is designed to meet the requirements of NYCHA’s buildings. The first set of 30 of these units will be deployed later in 2023.
6. Regional Clean Energy Hubs are being established in each of the economic development regions of the state. These community-based organizations will work to increase customer intake and provide support for accessing wraparound services and resources.
7. A reminder that programs are available to assist customers with their energy bills, including HEAP, the EAP Low-Income Discount Bill Program, and the utilities’ individual bill assistance programs.

## Survey Data Analysis

At the completion of the webinar, attendees were prompted to fill out a survey asking about general awareness of the programs in the LMI Portfolio and soliciting feedback on features and logistics of the webinar. A summary of the responses is provided below:

There were twenty-two total respondents to the survey, representing approximately one-fifth of attendees. Survey respondents included representatives from direct service implementation contractors, community-based organizations, NYS government, utilities, and consultants. Eight respondents indicated that their organizations were headquartered downstate, thirteen respondents indicated that their organizations were headquartered upstate, and one respondent indicated that their organization was headquartered outside of New York State.



Twenty out of twenty-two respondents said the webinar presentation was “the right length, [with] enough detail on the topics I needed to learn about.” All respondents except one said “information was presented clearly” for each of the four major sections of the webinar. Four additional follow-up questions and comments were posed by respondents, which are included in the Questions and Answers section above.