

Statewide Low- to Moderate-Income Portfolio Stakeholder
Webinar
November 9, 2023
1:00 PM – 3:00 PM
Summary Report

Filed: March 20, 2024
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”),¹ NYSERDA and the Utilities² (collectively, “Program Administrators”) hosted a webinar for stakeholders on November 9, 2023.³ 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”).⁴ The Statewide LMI Portfolio is 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: November 9, 2023

Time: 1:00 PM – 3:00 PM

Location: Webinar

¹ 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 4, on November 1, 2023.

² 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”).

³ 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.

⁴ *Id.*

Moderator and Presenters:

Moderator:

Ben Davis, Concentric Energy Advisors

Presenters:

Annalyssa Sikorski – National Grid

Dave Friello – NYSERDA

Mike Del Negro – NYSEG/ RG&E

Vas Darmograi – National Grid

Briana Parchment – National Grid

Samuel Pastrick – Con Edison

Agenda

- Welcome and Meeting Procedures
- NE: NY and CEF Proceeding
 - Update and Context for Today’s Webinar
- Statewide LMI Portfolio
 - 2023 LMI Implementation Plan
 - High-Level Performance Update
- 1-4 Family Homes Program Update
 - EmPower+ Launch
 - Survey Results and Next Steps
 - National Grid Social Media and Text Message Campaign
- Affordable Multifamily Energy Efficiency Program (AMEEP) Update
 - Program Update
 - AMEEP Roundtable Takeaways and Next Steps
- 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 and AMEEP email lists. In addition, a meeting notice was posted on the Department of Public Service (“DPS”) Document and Matter Management website (“DMM”) on October 10, 2023. Due to dispersed physical locations of stakeholders, this session was held electronically via webinar.

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

There were 187 registrants. 116 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 of the utmost importance 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.

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 verbal 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 two most recent prior webinars, in December 2022 and June 2023, 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 webinar and/or additional responsive information being provided now for the first time.

- Q1. How are incentives for the EmPower+ program dispersed?
- A1. NYSERDA pays EmPower+ incentives directly to contractors. Any cost contribution required beyond available incentives are worked out directly between the customer and contractor.
- Q2. Are mobile homes included in 1-4 Family Homes efforts?
- A2. Yes. The programs serve mobile homes through EmPower+ and KEDLI Home Energy Affordability Team (HEAT).

- Q3. Regarding the EmPower utility survey of LMI customers outlined in the slides, are the survey and its results available to the public?
- A3. The results shared in the presentation slides will be filed in conjunction with this report and made available through DMM.
- Q4. Was any follow-up conducted with survey respondents that expressed dissatisfaction with the EmPower program?
- A4. Survey responses were received anonymously, so individual follow-up about specific responses is not possible. Customers are provided with an 800 number to call with questions or feedback about the program.
- Q5. Are the EmPower applications that are mailed to customers pre-filled?
- A5. EmPower applications that are sent in the mail to prospective participants are not pre-filled. However, for those who are referred to EmPower by the utilities or other entities, the application package includes a code in the welcome letter that allows the customer to bypass income verification documents when they apply.
- Q6. Regarding National Grid's text message campaign, how are customers reached who do not have the ability to receive text messages?
- A6. The text message campaign was targeted only at customers in National Grid service territory. All customers referred to the program receive a paper application in the mail from NYSERDA. Customers who do not have text messaging capabilities (e.g., those with only landlines) are included in other outreach about the program, including postal mail, email, social media, outreach through customer service representatives at the utilities and NYSERDA, outreach through contractors, and other means.
- Q7. For the Multifamily, 1-4 Family Homes, and EmPower+ programs, are funds available through the Inflation Reduction Act (IRA) viewed as an additional layer of support?
- A7. At this point in time, the program administrators are working through any final rules on IRA funding guidelines. Please contact residential.ira@nyserda.ny.gov with any further comments or questions.
- Q8. Will a new downstate calculator tool be made available to reflect the comprehensive points changes made to AMEEP?
- A8. An updated calculator tool will be released to align with the points changes reflected in the current Program Manual. For any projects looking to submit applications right away, please submit the existing calculator tool with the old points values, and the implementation contractor for the program will update the points.

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.

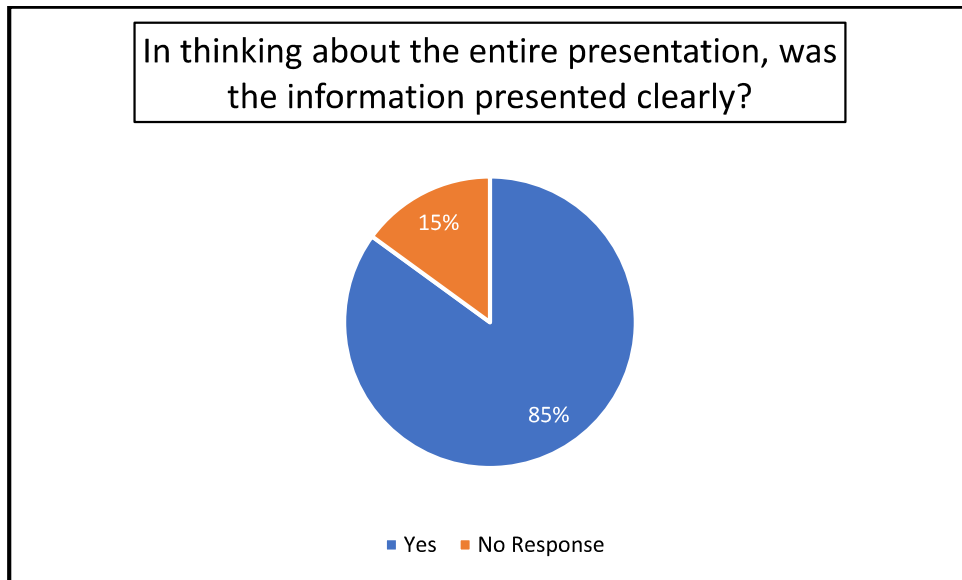
1. The NYS Public Service Commission's July 20, 2023 Order Directing Energy Efficiency and Building Electrification Proposals included several decisions and directives related to the Statewide LMI Portfolio:
 - a. NYSERDA was established as the primary LMI Program Administrator for 1-4 family homes statewide and upstate multifamily LMI homes. Con Edison, National Grid, and NYSERDA will jointly serve multifamily LMI customers in the downstate region.
 - b. The Program Administrators submitted proposals to the Commission on November 1, 2023. They will host upcoming technical conferences to present their proposals and will continue to work closely with DPS Staff to implement directives of the Order.
2. The LMI statewide portfolio is projected to serve over 110,000 participants in 2023.
 - a. Additional statistics are included in the presentation slides and in the LMI Implementation Plan, filed in Docket 18-M-0084 and revised on November 1, 2023.
3. The 1-4 family homes initiatives made progress on several objectives in 2023:
 - a. The low-income EmPower NY program and the moderate-income Assisted Home Performance with ENERGY STAR program were combined and relaunched as EmPower+ this past July. Additional program specifics are included in the presentation slides.
 - b. The Program Administrators conducted a survey of participants, non-participants, and Participating Contractors with the EmPower NY survey in Q2-Q3 of 2023.
 - i. Generally, survey responses indicated that participants were highly satisfied with the program, non-participants were not enrolled primarily due to lack of awareness, and contractors valued word-of-mouth endorsements from participating customers.
 - ii. Additional response detail is included in the presentation slides.
 - c. In February 2023, National Grid piloted a text message campaign to conduct outreach to customers referred to the EmPower program that had an active cell phone number on file. The response rate was above industry average and National Grid will continue text message communication in the future.
 - d. National Grid also conducted a social media pilot to promote the new EmPower+ program, partnering with local organizations that are trusted by LMI customers to spread awareness of these posts.

4. The multifamily LMI program, AMEEP, implemented several changes in its Program Manual released on October 30, including updates to points allocated to Comprehensive Pathway measures.
5. AMEEP program administrators also held a roundtable webinar with stakeholders in August to collect feedback and identify opportunities for improvement. In response to feedback received, the program administrators will take action on several items, as outlined in the presentation slides.

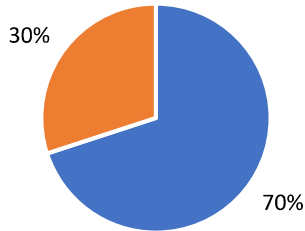
Post-Presentation Survey Data Analysis

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 total respondents to the survey, representing approximately fifteen percent of attendees. Survey respondents included representatives from direct service implementation contractors, community-based organizations, NYS government, utilities, and consultants. Fifteen out of twenty respondents said the webinar presentation was “the right length, [with] enough detail on the topics I needed to learn about.” Select other response information is shown graphically below.

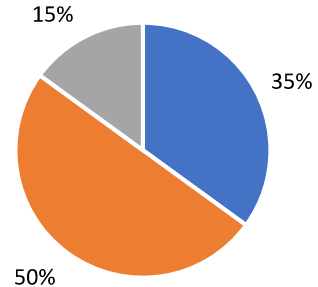


Have you attended LMI Webinars sponsored by the LMI Joint Management Committee (JMC) in the past?



- This is the first webinar I have attended sponsored by the LMI JMC.
- I have attended previous webinars sponsored by the LMI JMC.

The organization you represent (i.e., headquarters, if applicable) is located in



- Downstate New York
- Upstate New York
- Outside of New York State

The Program Administrators are required to conduct at least two stakeholder meetings a year. The November 9, 2023 stakeholder meeting was the second session this year. How likely are you to attend a stakeholder meeting in the future?

