

Statewide Low- to Moderate-Income Portfolio Stakeholder  
Webinar  
August 1, 2024  
1:00 PM – 3:00 PM  
Summary Report

Filed: September 3, 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”),<sup>1</sup> NYSERDA and the Utilities<sup>2</sup> (collectively, “Program Administrators”) hosted a webinar for stakeholders on August 1, 2024.<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, through a post-webinar survey, 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”). 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:** August 1, 2024

**Time:** 1:00 PM – 3:00 PM

**Location:** Webinar

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<sup>1</sup> Case 18-M-0084, In the Matter of a Comprehensive Energy Efficiency Initiative (“NENY Proceeding”), Order Authorizing Utility Energy Efficiency and Building Electrification Portfolios Through 2025 (issued January 16, 2020) (“2020 NENY Order”). Pursuant to the 2020 NENY 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 July 1, 2024.

<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. NENY Proceeding, 2020 NENY Order, p. 101.

## Presenters and Q&A Moderator:

### Presenters:

Annalyssa Sikorski – National Grid  
Laura Geel – NYSERDA  
Aisha Kutter – Central Hudson  
Courtney Moriarta – NYSERDA  
Dave Friello – NYSERDA  
Vas Darmograi – National Grid  
Zakiya Sharpe – Con Edison  
James Mannarino – NYSERDA  
Jessica Ortiz – NYSERDA

### Q&A Moderator:

Ben Davis, Concentric Energy Advisors

## Agenda

- Welcome and Meeting Procedures
- 2020-2025 Statewide LMI Portfolio Overview
- Inflation Reduction Act Highlights
- 1-4 Family Homes Programs Update
- Affordable Multifamily Energy Efficiency Program (“AMEEP”) Update
- NYSERDA Partnerships with Affordable Housing Agencies
- Regional Clean Energy Hubs
- 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 June 21, 2024.

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 193 registrants. 133 individuals attended the webinar.

## 4. Review of Stakeholder Input

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 to 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).

### Key Takeaways

For additional context, the JMC is providing here a summary of key takeaways from the meeting, which incorporates the content presented by the Program Administrators and shared on the presentation slides.

1. The LMI statewide portfolio served over 147,000 participants in 2023
  - a. Additional statistics are included in the presentation slides and in the 2023 LMI Annual Report, filed in Dockets 18-M-0084 and 14-M-0094 on April 3, 2024
2. Under the Inflation Reduction Act (“IRA”), the Home Efficiency Rebates Program (“HER”) provides \$159 million to NY State for whole-house energy savings projects, and the Home Electrification Appliance Rebates Program (“HEAR”) provides \$158 million for electrification measures for income-eligible customers
3. The 1-4 Family Homes initiatives made progress on several objectives in recent years:
  - a. The Utilities and NYSERDA continue to collaborate on numerous efforts to test new methods, identify opportunities and gaps, and improve results as it relates to utility marketing, outreach, and education to support awareness and participation in EmPower+
  - b. The Utilities have implemented and assessed innovative outreach strategies, such as ABC messaging, text messaging, and electronic and postcard invites, to increase utility customer awareness of and participation in programs
  - c. A new program workflow system enabling efficient scaling of the 1-4 Family Homes programs is being rolled out to focus efforts on outreach and coordination
  - d. The EmPower+ program began offering heat pump rebates through IRA funding for homes using oil, propane, or electric resistance heating. Rebates for gas heating customers may be considered later. Updated rules are expected in early Fall 2024, continuing the effort to support lower-income New Yorkers through the energy transition.

- e. National Grid’s KEDLI HEAT moderate-income participation has grown due to targeted outreach campaigns. 243 moderate-income customers were served through KEDLI HEAT in 2023 and 185 have been served year-to-date.
- 4. In the Affordable Multifamily Energy Efficiency Program (AMEEP), Program Administrators spent approximately \$42 million in 2023. The program was especially active in downstate New York, where approximately 80% of the multifamily building stock is located. Most of the AMEEP projects involved lighting, HVAC, building shell, and motors and drives.
  - a. Two case studies of Upstate and Downstate multifamily projects were shared, including measure scope, estimated incentive payout, and estimated energy savings.
  - b. AMEEP program updates:
    - i. The Program Manual has been updated to remove the comprehensive audit requirement and revise related processes. Non-comprehensive incentive rates were adjusted for select measures in UNY and DNY, and the threshold for large projects requiring pre-approval has been lowered.
    - ii. New limited time offers (“LTOs”) have been introduced for roof and wall insulation, and for comprehensive gas projects. The LTOs provide additional incentives for comprehensive projects with envelope measures.
    - iii. To streamline and simplify eligibility, Con Edison continues to offer an online tool to confirm building affordability status and allows multifamily buildings in certain Bronx districts to automatically qualify for participation. Additionally, Con Edison continues to offer a Limited Time Offer for buildings that can comply with LL97 through the prescriptive pathway.
- 5. NYSERDA and the Utilities gave an update on their ongoing partnerships with affordable housing organizations New York State Homes and Community Renewal (“HCR”), New York City Department of Housing Preservation and Development (“HPD”), and the New York City Housing Authority (“NYCHA”):
  - a. HCR embeds decarbonization incentives and performance criteria into its financing RFPs, provides incentives for heat pump systems and high-performance envelope improvements, and has committed funds to 60 projects. Upcoming priorities include identifying and developing collaborations for 1-4 Family Homes programs and aligning with federal funding opportunities.
  - b. HPD has decarbonization incentives and performance criteria for preservation projects, provides incentives for heat pump systems and energy performance improvements, and launched a program for passive house new construction. NYSERDA and HPD have committed funds to 9 projects. Upcoming priorities include supporting HPD with capacity building, incentives, and technical assistance through 2025, as well as aligning with federal funding opportunities.
  - c. For NYCHA, Gradient Comfort and Midea America were awarded purchase orders for Packaged Window Heat Pumps (“PWHPs”), with 72 units installed in NYCHA’s Woodside Houses in a demonstration phase. These heat pumps can be installed by non-specialized staff, plug into standard wall sockets, and require no wall drilling or plumbing. NYSERDA and NYCHA provide significant funding for these installations, and the performance is being assessed over the 2023/24 heating

season. Upcoming priorities involve NYCHA, NYPA, and NYSERDA coordinating with manufacturers on the outcomes of the demonstration phase, and NYSERDA implementing an expanded program to deploy additional PWHPs.

6. The Regional Clean Energy Hub initiative, co-designed with community-based organizations (“CBOs”), is funded with up to \$61 million over four years from the Clean Energy Fund and Regional Greenhouse Gas Initiative. It establishes 12 Clean Energy Hubs across New York State, delivered through CBOs and nonprofits, to support disadvantaged communities. The Clean Energy Hub activities include outreach, building partnerships, assisting with project and application processes, and providing workforce development and small business support. The program has served 1,963 customers, referred 2,850 projects, and hosted 1,425 outreach events.

## 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. The Program Administrators similarly provided multiple opportunities for attendees to offer questions and comments during prior webinars, and attendees responded positively to the opportunity to ask questions directly after learning about a specific topic. The webinar also included a Chat function, through which attendees were able to provide, review, and respond to feedback. As described further below, this was a new feature as compared to prior webinars.

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 written and/or verbal response provided during the Webex and/or additional responsive information being provided now for the first time.

## 2023 Review

- Q1. The overview of 2023 denotes participants served, whereas the year-to-date review of 2024 denotes projects completed. How many projects were completed in 2023?
- A1. This question reflects the importance – and potential complexity – of the terms “participants” and “projects,” which can sometimes, but not always, be used interchangeably. The terms “participants” is defined in the LMI Portfolio as dwelling units served in statewide programs.<sup>4</sup>

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<sup>4</sup> Dwelling units that receive both electric and gas measures are counted in both the electric and gas categories in Clean Energy Dashboard scorecards provided by Utilities; participant counts were reflected identically in the 2023 Annual Report and here.

For 1-4 Family data, the terms “participants” and “projects” may be used interchangeably. In 2023, the 1-4 Family programs served 9,897 participants/completed 9,897 projects. In 2024 to date (*i.e.*, May 31, 2024), the 1-4 Family programs served 5,417 participants/completed 5,417 projects.

For a multifamily program such as AMEEP, there may be a significant distinction between the data for project and participants/dwelling units, as, for example, a single project may include a large number of dwelling units in a single building. For AMEEP in 2023, 134,417 participants were served in 1,879 completed projects. For AMEEP in 2024, approximately 6,900 participants had been served through May 31, 2024, in 379 completed projects; however, many more projects are in progress (serving approximately 170,000 participants, though not all of these projects are expected to be completed in 2024).

- Q2. What percentage of allocated funds was spent in 2023?
- A2. In 2023, the Utilities spent approximately \$70.1 million in the LMI Portfolio. As a point of reference, the 2020 NENY Order authorized \$55.3 million in LMI funding for the Utilities in 2023.<sup>5</sup> On a percentage basis, therefore, the Utilities spent 129% of this authorized amount in 2023. It is noted that there are additional factors that impact this percentage. For example, Program Administrators are able to shift LMI Portfolio funding between years, to accommodate varying levels of participation in given years. Similarly, in limited cases, utility spending includes funding from other utility allocations, such as rate cases. NYSERDA funding spent in the LMI Portfolio in 2023 was \$64,281,247. Please see the 2023 Annual Report for additional details.<sup>6</sup>
- Q3. What are the NYSERDA “fuel neutral” programs? NYC has an issue with oil buildings complying to LL97 321a prescriptive pathway due to lack of incentives.
- A3. NYSERDA's programs are fuel neutral and so NYSERDA Multifamily (5 units and up) programs provided incentives for oil-fueled buildings (for heating, hot water, electrification, envelope, etc.). These savings are distinguished by fuel type and are reported as an overall MMBtu number.
- Q4. The report indicates that utility bill discounts were funded at \$200 million in FY 2023-2024. How many households are served with this funding? Is there consideration of offering this funding to eligible families converting from gas to electric heat?
- A4. Utilities that have delivered the one-time bill credit have filed reports under Case 23-M-0298 *In the Matter of Budget Appropriations to Enhance Energy Affordability Programs* and Case 14-M-0565 *Proceeding on Motion of the Commission to Examine Programs to Address*

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<sup>5</sup> NENY Proceeding, 2020 NENY Order, Appendix A, pp 3, 6.

<sup>6</sup> NENY Proceeding, Statewide Low- and Moderate-Income Portfolio 2023 Annual Report (“2023 LMI Annual Report”) (April 1, 2024).

*Energy Affordability for Low Income Utility Customers* containing the amount of budget funds allocated to and dispensed by the utility and the number of customers who received the credit. Utilities that have not delivered the one-time bill credit to customers will be filing similar reports to the case numbers noted above 60 days after the credit is dispensed. The \$200 million from the FY 2023-2024 State budget was offered to all electric and/or gas customers regardless of heating type.

Q5. How are the Program Administrators preparing for the transition to the Strategic Framework of NENY II?

A5. As stated during the presentation, this stakeholder webinar is focused on the current LMI Portfolio, applicable for the period 2020-2025. As such, this question is generally beyond the scope of this webinar or this Q&A Summary. It is noted, however, that each of the Program Administrators has filed a proposal (or proposals) for the period 2026-2030, including the Strategic Framework and information on transition planning. The Program Administrators are currently awaiting an Order on these proposals. Pending this Order and/ or other Commission or DPS guidance, the Program Administrators will continue to engage with stakeholders, including in future LMI JMC stakeholder engagement efforts.

#### Inflation Reduction Act (IRA)

Q6. Can you share any rationale behind why IRA funds will not be eligible to be stacked with NYS Clean Heat and EmPower+ program incentives?

A6. The current pause on combining NYS Clean Heat and EmPower+ was put into place to allow NYSERDA, DPS, and the Utilities to review the plans for administering EmPower+/HEAR rebates to mitigate the potential for increased energy burden for lower-income customers, while also ensuring adequate plans are in place to manage NYS Clean Heat budgets. NYSERDA will work with the Department of Public Service and utility companies on the design of future offerings funded through the IRA and will communicate with contractors and other interested parties as updates are available.

Q7. Will IRA funds be braided with existing multifamily programs?

A7. Once available, IRA funds can be braided with existing NYSERDA multifamily programs.

Q8. What has been the uptake for IRA rebates since launch?

A8. In the early weeks of IRA rollout, the Program Administrators have noted approximately a 35% increase in applications to EmPower+.

Q9. Will the plans for IRA rebate implementation be shared?



- A9. A Community Benefit Plan and a Consumer Protection Plan for EmPower+ are publicly available on NYSERDA's website (<https://www.nyserdera.ny.gov/All-Programs/EmPower-New-York-Program/What-to-Expect>). Upon the Department of Energy's approval of the full application and launch of other program components, the updated Plans will also be shared publicly.
- Q10. How was the Community Benefit Plan created? What community engagement took place for that process?
- A10. NYSERDA developed the initial Community Benefit Plan over the course of many months using feedback gathered from numerous stakeholders through many engagement sessions. This included a two-day in-person meeting in October 2023, small virtual working groups, meetings with Energy Equity Collaborative and Regional Clean Energy Hubs, public comments, and other regular stakeholder engagements, among other opportunities. NYSERDA has continued this engagement beyond the initial plan for EmPower+. Those interested in joining future opportunities for discussion may email [residential.ira@nyserdera.ny.gov](mailto:residential.ira@nyserdera.ny.gov) to be added to the mailing list. Everyone's input is welcome.
- Q11. Are homes heated with wood stoves eligible for heat pump rebates through EmPower+ or IRA HEAR?
- A11. Yes.
- Q12. Are there plans to create guidelines for the IRA funding? It would be very helpful to have a clear and succinct set of guidelines to refer to.
- A12. NYSERDA's marketing team is currently working on publicly accessible information about IRA programs administered by NYSERDA.
- Q13. Please provide more details on the EmPower+ IRA funding program for 1-4 family residential buildings. Will the added IRA rebates pay for added health and safety measures?
- A13. In addition to incentives for measures such as heat pumps for space and water heating, IRA HEAR funding includes incentives for Electrical Wiring Upgrades and Electrical Service Upgrades (Panel Box) which are enabling measures, but not direct energy saving measures. The IRA HEAR funding NYSERDA has received is limited to a specific list of eligible measures prescribed by the law to support energy efficiency and electrification. Health and safety measures are not included.

#### 1-4 Family Homes Programs

- Q14. What is the geographic breakdown of the 1-4 Family program?

A14. The EmPower+ program is statewide; however, the ability to serve homes is based on the funding that is available and the restrictions of that funding. For example, a home on Long Island with PSEG as the electric utility will not be able to be served by program funds that come from an electric systems benefit charge (“SBC”), as PSEG customers do not pay into the SBC. If that same home is HEAP eligible and has an award letter, and Office of Temporary and Disability Assistance (“OTDA”) funds are available, then the home can be served with OTDA funds.

For more information on geographic breakdown, Open NY is the best source of publicly available information on program data: [https://data.ny.gov/Energy-Environment/Residential-Existing-Homes-One-to-Four-Units-Energy/4a2x-yp8g/about\\_data](https://data.ny.gov/Energy-Environment/Residential-Existing-Homes-One-to-Four-Units-Energy/4a2x-yp8g/about_data). There, visitors can view data on project county, city, and zip code, among other factors.

Additionally, the KEDLI Home Energy Affordability Team (“KEDLI HEAT”) is a 1-4 Family program offered by National Grid in the KEDLI Service territory (Long Island) to their gas low- and moderate-income customers. Participation in this program can be found in the Clean Energy Dashboard. KEDLI HEAT will sunset at the end of 2025; KEDLI Gas customers will then be eligible to be served by NYSERDA in the EmPower+ program.

Q15. When will the application page for EmPower+ be updated to have better language surrounding gender?

A15. The current gender language on NYSERDA’s EmPower+ applications is a requirement for certain federal funding sources.

Q16. Will the rules for how EmPower+ makes its eligibility determinations be shared publicly? Specifically, the detailed rules, not just the overarching income limits and basic requirements, would be helpful.

A16. The EmPower+ Program Manual is publicly available at this link: <https://hpwescontractorsupport.com/2022-2023-program-manual/>. Detailed eligibility rules are included in Section 3.6.

Q17. According to the report, EmPower+ uses geo-eligibility with the criteria that 50% of residents be at or below 150% of the Federal Poverty level. What are the geo-eligibility areas in NYC for EmPower+?

A17. We are unable at this time to utilize geo-eligibility to qualify homes for projects receiving IRA funding due to rules established by the U.S. DOE.

- Q18. What are the health, safety and resiliency measures provided by National Grid in the HEAT program? Are they more extensive than the minor improvements (gas leak repairs, smoke and CO detectors, combustion safety and venting?)
- A18. KEDLI HEAT provides services and measures that are appropriate for health and safety issues such as carbon monoxide detectors, thermostatic pressure drip tubes, smoke detectors, ventilation enhancement, and clean and tune services for gas fired heating equipment. National Grid has outlined a plan to provide incentives for more intensive health and safety measures such as gas leaks and pipe repair, roof repair/replacement, water/wastewater issues relating to domestic water systems, and measures to address suspected environmental hazards in their Weatherization Health & Safety program. The implementation plan for this program can be found in Case No. 23-G-0225 and 23-G-0026.
- Q19. Can NYSERDA provide some clarity on how up to 100% of project costs can be covered? Is that being considered with respect to varied equipment pricing throughout NY State?
- A19. EmPower+ is still restricted to overall incentive caps as indicated on slide 18 in the presentation slides. These maximum amounts are \$29,000 for <60% AMI/SMI and \$24,000 for 60-80% AMI/SMI. Prior to the release of IRA HEAR rebates, 60-80% AMI/SMI households were limited to 50% of total project cost and low-income (<60%) was determined only based on SMI. This increases the total incentive amount available to all LMI households and broadens eligibility.
- Q20. Where can stakeholders find the reports on outreach efforts and other testing?
- A20. Information on the outreach efforts may be found in the documents previously filed on DMM listed below:
- The 2023 LMI Annual Report<sup>7</sup>
    - Provides additional information on National Grid’s text messaging campaign (Section 10.4.1)
    - Provides additional detail on EmPower+ Survey Results (p. 14, FN 38)
  - The November 2023 Stakeholder Session Presentation<sup>8</sup>
    - Presents information on the results of the 1-4 Family EmPower+ survey (Slides 19-32)
    - Presents results from National Grid’s text message campaign (Slide 33)
  - The 2022 LMI Annual Report<sup>9</sup>

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<sup>7</sup> NENY Proceeding, 2023 LMI Annual Report.

<sup>8</sup> NENY Proceeding, Statewide LMI Portfolio Stakeholder Webinar, November 9, 2023, Presentation (March 20, 2024).

<sup>9</sup> NENY Proceeding, Statewide Low- and Moderate-Income Portfolio 2022 Annual Report (“2022 LMI Annual Report”) (April 1, 2023).

- Provides additional information on the “ABC Email Messaging” campaign, which involved sending three different messages with different themes (p. 19, FN 44)
- The December 2022 LMI Stakeholder Session Q&A Report<sup>10</sup>
  - Provides additional detail on the ABC messaging campaign (p. 7)

### Energy Cost Savings Threshold

- Q21. What percentage of applications achieve the 20% energy cost savings threshold? How many applications are rejected for not reaching the 20% threshold?
- A21. As this requirement was recently introduced and is specifically for EmPower+ projects seeking heat pump incentives from IRA, NYSERDA does not currently have publicly available metrics for it.
- Q22. Why was the 20% energy cost savings threshold created? If required by statute, can you point to which one?
- A22. The 20% energy cost savings was adopted as a safeguard for low- and moderate-income households adopting heat pump equipment to prevent instances where installation of the equipment would increase the household's energy costs.

### Heat Pumps

- Q23. LMI units typically do not have air conditioning as a whole-house system – when switching to a heat pump for heating and cooling from a system that provided only heat, how is the added cost to provide air conditioning accounted for? If projects are required to reduce cost for interior space conditioning, not accounting for this may skew the math for a large number of otherwise eligible participants.
- A23. For NYSERDA, energy savings calculations consider the entire existing fuel and electric usage of the building for heating and cooling and compare it to future estimated use for heating and cooling. Any added consumption for whole home air conditioning is included in this usage analysis as is the existing usage of window air conditioners.

While all NYSERDA projects aim to save energy on a net MMBtu basis, the associated utility bill impacts to tenants depends on a variety of different factors – such as utility rates, established owner vs. tenant costs, regulated vs. unregulated affordable housing, subsidized vs. unsubsidized affordable housing, utility allowances, etc.

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<sup>10</sup> NENY Proceeding, Statewide Low- to Moderate-Income Portfolio Stakeholder Webinar, December 15, 2022, Summary Report (January 19, 2024).

For more information, please visit the EmPower+ Program Manual at <https://hpwescontractorsupport.com/2022-2023-program-manual/>.

## Multifamily

- Q24. How can FlexTech help with technical advice for AMEEP projects, especially for smaller buildings (e.g., 5-25 units) where a FlexTech audit may not be in the landlord's budget?
- A24. The energy audit has been removed as a requirement for all building sizes participating in AMEEP. For projects serving LMI buildings, NYSERDA provides a 75% cost share incentive on FlexTech audits that can be used to drive project scopes to be installed under AMEEP. A smaller building that may not be able or interested in participating in FlexTech can work with the AMEEP program Implementation Contractor and any installing contractor to identify opportunities and develop an appropriate scope. NYSERDA anticipates the launch of a new technical assistance program in support of smaller LMI buildings before the end of the year.
- Q25. Can FlexTech audit cost share be used for LL87 reports?
- A25. The FlexTech program can support studies that are done for local law compliance provided they meet FlexTech eligibility requirements. FlexTech is only able to cover energy studies or assessments that meet the potential for savings listed in the Program Opportunity Notice. FlexTech funding cannot be used toward certification/filing.
- Q26. Why is so much of the electric measure mix in lighting? Why isn't heat pump installation a larger share?
- A26. AMEEP offers incentives for energy efficiency measures only. Heat pumps are not currently part of the program.
- Q27. For AMEEP, what is the expected project completion time per property?
- A27. AMEEP completion time is currently 12 months after the Notice to Proceed is issued for non-comprehensive projects and 2 years for comprehensive projects.
- Q28. How does National Grid Downstate impact the "Streamline" process?
- A28. This area is a major focus for program improvement. We recognize that there are currently a lot of documentation and review requirements in the program and National Grid is working as part of the collective to review those requirements to identify where things can be reduced or streamlined to make the program process easier and quicker.
- Q29. What is NYSERDA's role in AMEEP?

- A29. While AMEEP is administered by the Utilities, NYSERDA collaborates with AMEEP by providing technical assistance through the FlexTech program. When the program first launched, NYSERDA also closely collaborated with AMEEP to enable some interested Multifamily Performance Program projects to transition over to AMEEP.
- Q30. The [Con Edison] screener tool is not very accurate. Are there suggestions on how to best utilize it?
- A30. Con Edison is currently looking into how best to improve and expand datasets that will feed into the screener tool and improve accuracy.
- Q31. How many buildings have used the Comprehensive program?
- A31. As of May 31st, 2024, 74 comprehensive projects are in progress with funds committed to them, and 29 comprehensive projects have been completed to date.
- Q32. What are the measures offered to tenants in the AMEEP program?
- A32. Measures offered in AMEEP can be found by referring to the program incentive fact sheets. Major measure categories include space and water heating equipment, weatherization measures, lighting, and direct in-unit measures. All measures are available in both the Comprehensive and Non-Comprehensive Pathways. Please visit <https://www.nyserra.ny.gov/All-Programs/Residential-and-Property-Owner-Income-Eligible-Programs/LMI-Stakeholder-Resources-New-Efficiency-New-York/NYS-Affordable-Multifamily-Energy-Efficiency-Program> to review the fact sheets.
- Q33. What is the capacity of the Flextech program? Many affordable building owners say there is a long waiting period for service. How many studies are done annually?
- A33. Based on the 2023 LMI Annual Report, there were 101 LMI applications received and 36 existing affordable projects that completed a FlexTech study in 2023. In May of this year, the FlexTech program transitioned to Salesforce, which has assisted in streamlining processes and increased customer visibility into project status and timeline. The FlexTech team continues to work toward making improvements to internal processes and reducing overall timelines for customers. NYSERDA anticipates the launch of a new technical assistance program in support of smaller LMI buildings before the end of the year.
- Q34. What is the coordination between Clean Heat and AMEEP? Will there be a shared application?
- A34. Participants can apply separately to both programs. There is no shared application at this time. The Program Administrators are exploring potential opportunities to integrate both programs.

Q35. What are lessons learned from Direct Injection programs (with HCR and HPD: Retrofit Electrification and CI) that can assist naturally occurring affordable housing?

A35. Direct Injection is a program model that relies on the partnership between NYSERDA and a state or city housing agency. Therefore, it is tricky to say just how much can be taken from this model and applied to naturally occurring affordable housing. However, Direct Injection provides certainty to project developers early in their redevelopment process and relatively seamlessly integrates ratepayer incentives into the other sources of capital invested into the building.

### Clean Energy Hubs

Q36. Would it be possible for NYSERDA, HCR, and HPD to work with Hubs and other regional and local stakeholder groups to identify and bundle remediation and repair funding opportunities, as well as other retrofit funding?

A36. This is a primary goal of the regional Hubs – to actively seek local resources available to assist customers.

Regional Clean Energy Hubs are currently tasked with understanding the stacking of funding opportunities for remediation and repair within their regions. NYSERDA is working with HPD and HCR to best leverage program resources and expertise to help address shared pain points with understanding as to where the regional funding opportunities exist.

Q37. It is frequently the case that the Hubs are referenced in proceedings and other meetings in connection with additional responsibilities. What increases in Hub budgets are being discussed? In addition, if the Hubs have capacity for additional engagement, they should be included in deliberations that affect their work.

A37. Regional Clean Energy Hubs are contracted over a four (4) year program period culminating in 2026. Currently, the Public Service Commission is undergoing a review of Utility and NYSERDA energy efficiency and building electrification programs and determining roles, budgets, and targets for 2026-2030.

Q38. How are the Utilities coordinating with the HUBs in marketing efforts? How effective have the Hubs been in providing clients with completed projects?

A38. Regional Clean Energy Hubs are meeting regularly with their utilities to coordinate marketing and outreach efforts. Initial Hub and utility meetings have included topics such as learning about and sharing outreach materials on programs, attending utility and Hub events, co-sponsoring events as well as advertising events. The Hubs are a referral program, meaning that NYSERDA can track which referrals Hubs have made to utility

programs. At this time, we are not able to determine if those programs have resulted in completed projects. More data is needed to determine this metric.

#### Additional Questions

- Q39. Does NYSERDA plan to report back on the uptake of the program referrals into implemented projects from the Clean Energy pipeline?
- A39. As it relates to EmPower+, utilities' access to the NYSERDA Referral Database allows for tracking of individual utility referrals as well as bulk reporting of project statuses. NYSERDA will work with DPS and the Joint Utilities to develop a template to share metrics in future stakeholder updates.
- Q40. How many customers have used the Centralized NY Energy Advisor website? How many contacts resulted in completed projects?
- A40. For NY Energy Advisor, there have been over 800,000 on-site actions (clicking through to a specific page, answering a quiz, etc.). There have been over 55,500 "Apply Now" or "Learn More" clicks on utility and NYSERDA programs featured on NY Energy Advisor. There is not a mechanism in place to track conversion from a website visit to the NY Energy Advisor to participation in a specific incentive program.
- Q41. Who administers statewide branding? Why does Clean Heat not use statewide branding as EmPower+, AMEEP, and Flextech do?
- A41. The Clean Heat Program is outside of the scope of the LMI Portfolio and this LMI Stakeholder Webinar. It is noted that the Clean Heat program does use statewide branding, as coordinated between the New York Electric Utilities<sup>11</sup> and NYSERDA. For more information, please see the Clean Heat Implementation Plan.<sup>12</sup>
- Q42. Where have public transportation posters and billboards been used for marketing? How effective are they? How effective is direct targeted mail? Is it done via the Utilities' mailing structure? What were the results?
- A42. In regard to NY Energy Advisor, Out of Home ("OOH") advertising (bus shelters, subways, bodegas, gas stations, etc.) has not been used to date, but is scheduled to go into market in October 2024. The OOH activity is going to be specifically targeted in Disadvantaged Communities ("DAC") across the State and will be available in the 4 most spoken languages

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<sup>11</sup> The New York Electric Utilities consist of Central Hudson Gas & Electric Corporation ("Central Hudson"), Consolidated Edison Company of New York, Inc. ("Con Edison"), Niagara Mohawk Power Corporation d/b/a National Grid ("National Grid"), New York State Electric & Gas Corporation ("NYSEG"), Orange and Rockland Utilities, Inc. ("Orange & Rockland"), and Rochester Gas and Electric Corporation ("RG&E") (collectively, "Electric Utilities").

<sup>12</sup> NENY Proceeding, NYS Clean Heat: Statewide Heat Pump Program Implementation Plan, Version 7 (March 1, 2024).



for the income-eligible audience. We will not have results on OOH/Public Transportation until after the activity runs.

Direct mail has not been used as part of the NY Energy Advisor paid media and outreach plan to date for the plan NYSERDA and the utilities collaborate on together. However, some utilities have included NY Energy Advisor messaging in their materials, such as bill inserts, customer emails, etc.

## Chat

The August 1<sup>st</sup> LMI Stakeholder Webinar enabled the Chat function on the webinar platform to allow a means for attendees to provide live input that all attendees and panelists were able to view and respond to. Much of the input provided in the Chat was also reflected and addressed in the presentation and in the Q&A, and is summarized in the “Question and Answers” and “Key Takeaways” sections above. However, the Chat also included feedback from stakeholders on topics that are not included in the above sections that the LMI Joint Management Committee intends to review. A few additional points addressed in the Chat that are not covered in any of the above sections are paraphrased and/or summarized below:

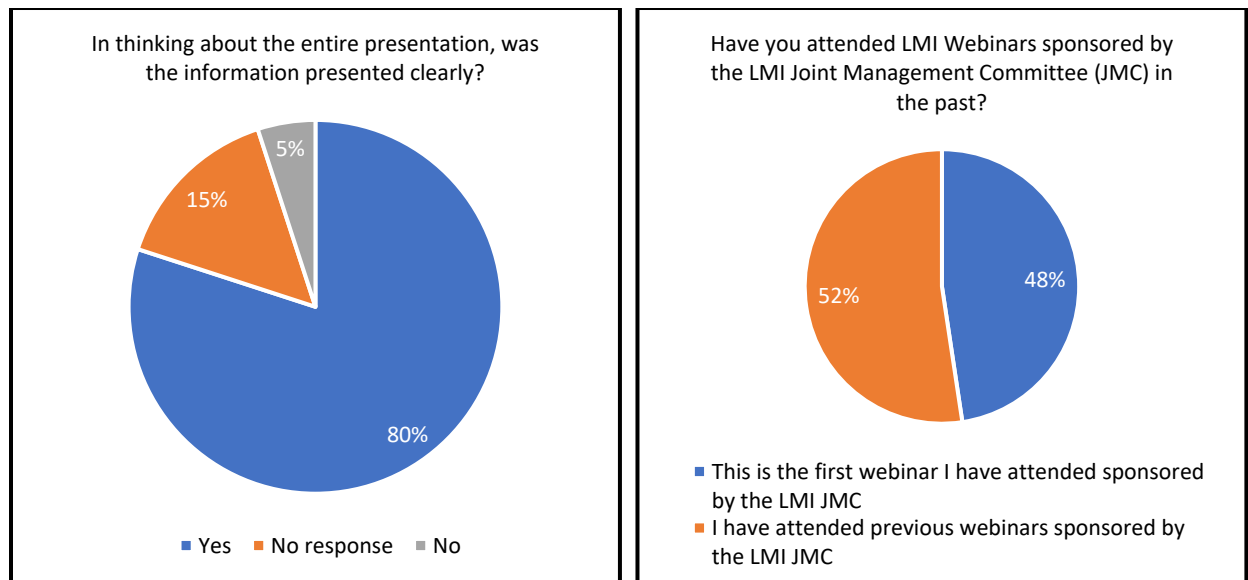
1. Requests were made to address the overall limitations of the current stakeholder process. Specifically, requests were made to see the attendee list and for an open Q&A section in all future stakeholder sessions.
2. Many comments emphasized the need for transparency and communication to address Hub organizations' challenges due to frequent program changes.
3. A suggestion was made to start the stakeholder engagement process before the initial draft of a proposal is created in the program development cycle.
4. Stakeholders recommend the strategic use of stackable funding under the Inflation Reduction Act (IRA) to maximize project success, even if it limits the number of beneficiaries.
5. Stakeholders emphasized that more detailed rulemaking is needed to clarify customer eligibility for various funding streams within EmPower+.
6. There was a call to leverage existing initiatives, such as the Energy Assistance Program (EAP) and others, to ensure that the operating cost differences between electric and gas heat pumps do not lead to increased energy costs. One person noted that stackable funding is available for LMI homes and buildings through the Weatherization program.
7. Stakeholders expressed several concerns about the EPA Solar for All program under NY SUN, particularly the lack of engagement with community-based organizations (CBOs) despite previous communications with NYSERDA leadership. They noted that NY SUN has failed to engage CBOs meaningfully, with only minimal presentations at a few Energy Equity Collaborative meetings.
8. Some stakeholders criticized NYSERDA's rule-setting, which they believe creates barriers for 2-4 family buildings, and pointed out that meeting dates for IRA HEAR engagement are often set with insufficient notice, limiting participation.
9. Stakeholders raised concerns about NYSERDA's ability to handle multifamily projects based on their track record with small residential projects in NYC.

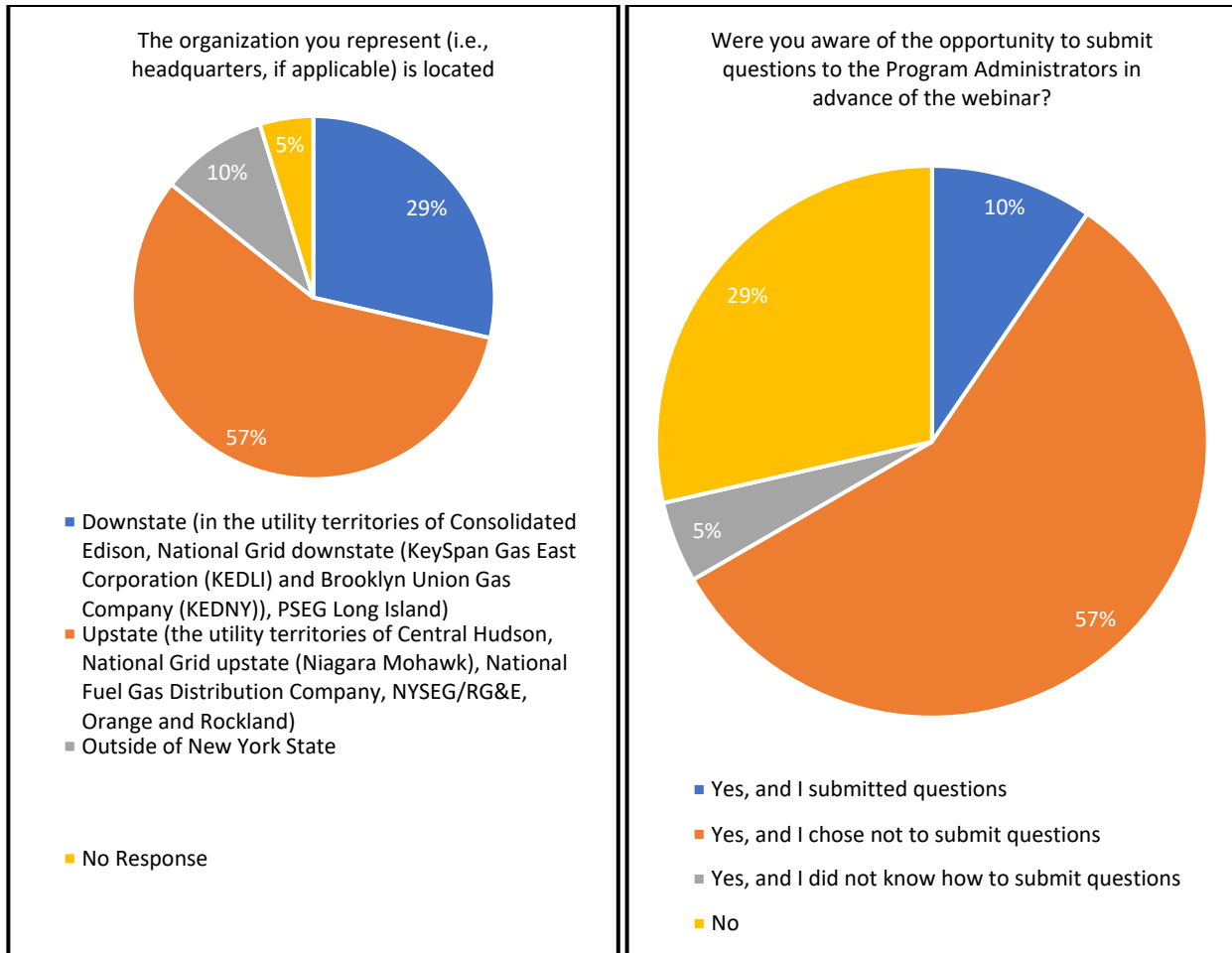
10. Stakeholders emphasized that many transformational elements of the Hubs' original purpose have been lost and criticized the current leadership for not maintaining the collaborative spirit of the Hub design.
11. Stakeholders observed that current program rules make it difficult for rural LMI households to meet requirements and noted that funding may not always cover the associated costs.
12. Stakeholders suggested creating a backstop fund to avoid issues similar to those experienced when the Con Edison Clean Heat program ran out of funds. They recommended that for LMI programs and others, there should be collaboration with the NY Green Bank to establish a backstop fund to cover projects in the pipeline when a program exhausts its budget.

### Survey Responses

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-one total respondents to the survey, representing approximately one-seventh of attendees. Survey respondents included representatives from direct service implementation contractors, community-based organizations, NYS government, utilities, and consultants. Several of the survey responses have been converted into quantitative summaries. 16 out of 21 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.





In addition, commenters provided qualitative responses, much of which overlapped with the Q&A and Chat, as described elsewhere in this report. A brief summary of input beyond what has already been described is provided below:

1. 6 responders suggested that the Program Administrators should create clearer guidelines for the Inflation Reduction Act.
2. 4 responders suggested that future stakeholder sessions should allocate more time for feedback and Q&A.
3. 2 responders suggested that future stakeholder sessions focus more on new information.
4. 1 responder suggested that the Program Administrators should explain how NYSERDA and the New York PSC cannot control the market rates for National Grid’s 1-4 Family Program.
5. 1 responder suggested that Program Administrators should include more personalized and digital communications for the 1-4 Family Program.
6. 1 responder suggested that the Program Administrators should only enable the Q&A feature to prevent the Chat from distracting during the webinar.