

Statewide Low- to Moderate- Income Stakeholder
Joint Webinar
December 21, 2020
11:00 AM – 12:30 PM

Summary Report

February 3, 2021
Case 18-M-0084
Case 14-M-0094

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 hosted a webinar for stakeholders on December 21, 2020.³ The objective was to provide stakeholders with an update on the July 2020 Implementation Plan filing and information on three subsequent required filings: the Statewide LMI Joint Management Committee Manual (filed October 14, 2020); the Statewide LMI Joint Management Committee Coordination Plan (filed November 13, 2020); and the Statewide LMI Verified Gross Savings (“VGS”) Specifications (filed December 14, 2020). A PowerPoint presentation was given at the stakeholder webinar, followed by time for stakeholders to ask questions and provide comments. At the end of the webinar, stakeholders were encouraged to submit any further comments, questions, or suggestions via the email address LMIforum@nyserda.ny.gov.

Questions and comments received during this stakeholder webinar have been and will continue to be reviewed and considered by the LMI Joint Management Committee.⁴ 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.

The PowerPoint presentation is attached as Appendix A.

Presentation:

Title: Statewide Low- to Moderate-Income Portfolio

Date: December 21, 2020

Time: 11:00 AM - 12:30 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) (“Implementation Order”). Pursuant to the Implementation 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”).

² The Utilities referred to herein are: Central Hudson Gas & Electric Corporation; Consolidated Edison Company of New York, Inc. (“Con Edison”); 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, Implementation Order, p. 101.

⁴ *Id.*

Presenters:

Chris Coll – NYSERDA

Rachel Charow – Con Edison

Brittney Pietro – National Grid

2. Stakeholder Information

Invitations, that included stakeholder registration information for the webinar, were sent electronically to stakeholders who had previously attended a stakeholder meeting and those listed on the LIFE email list. In addition, a meeting notice was posted on DMM on December 9, 2020. Due to COVID-19 restrictions on in-person gatherings, this session was held electronically via webinar.

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

There were 230 registrants of which 161 attended the webinar. Of those attendees, 51% were from downstate (NYC boroughs and Long Island), 36% were from upstate New York and the remaining 13% were from out of state.

3. Review of Stakeholder Input

The Portfolio development is expected to continue throughout the Implementation Plan lifetime (*i.e.*, 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 redesign of initiatives.

Multiple topical workstreams, reporting directly to the Joint Management Committee, have been created to address specific initiatives and services. These include but are not limited to: 1-4 Family Homes, Existing Affordable Multifamily, NY Energy Advisor,⁵ Beneficial Electrification, Evaluation, Measurement, and Verification (“EM&V”), Outreach and Marketing, and other areas including data sharing, implementation consultants, and a single process application. 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 for review. Recommendations will be made, based on that review, to the Joint Management Committee.

⁵ “NY Energy Advisor” is the name of the web-based customer hub platform that the Program Administrators are developing to host information regarding the LMI Portfolio programs. The NY Energy Advisor is described further in Section 5.2 of the Implementation Plan, pp. 50-55.

Topics/Discussion/Comments:

During the webinar, participants asked questions and made comments about programs and other aspects of the Portfolio. The discussion is summarized here:

- **Evaluate/replace the term “family.”** The term "household" should be considered instead of “family” when verifying income. This would recognize the differences in the makeup of people sharing housing.
- **Treatment of buildings that are previous program participants** Participants asked whether homes previously served by an energy efficiency program or the Weatherization Assistance Program (“WAP”) can be served again. Additional upgrades for properties previously incentivized by WAP or EmPower (the current NYSERDA program serving low-income 1-4 Family Homes), can be considered; however the decision to provide services to those previously served properties will be project-specific.
- **Multifamily building stock variations around the state.** During development of the Portfolio, the Program Administrators will evaluate and consider multiple incentive design elements to reach the objectives of serving affordable multifamily buildings. Within that process, consideration will be given to the diverse housing stock around the state.
- **Layered incentives.** During development of the Portfolio, the Program Administrators will design initiatives to ensure incentives are complementary and not competitive.
- **Heat Pump Adder Study.** NYSERDA commenced a Heat Pump study in December 2020 to better understand the considerations for heat pump installation for LMI households and in affordable housing, including the impacts on energy costs from installing heat pumps in single-family homes. There will be 500 single family and 30 affordable multifamily projects participating in this study by installing heat pumps. Heat pump water heaters and upgraded panel boxes can be included. On a case by case basis, health and safety upgrades will be considered. Projects are being enrolled on a first-come, first-served basis, however NYSERDA is seeking geographic balance. Information on the Heat Pump study is found at <https://www.nyserda.ny.gov/All-Programs/Programs/EmPower-New-York>.
- **Health and Safety Improvements.** LMI properties may need significant upgrades that relate to but go beyond energy measures. Energy efficiency programs should consider the balance of funding being allocated to energy efficiency improvements and non-energy costs. However, some health and safety or structural deficiencies can exceed the budgets for energy efficiency programs and instead lead to project deferral. NYSERDA is working with the NYS Department of Health on a pilot to reduce asthma triggers in home through healthy home interventions, including energy efficiency upgrades. The Program

Administrators will also explore additional opportunities to pilot and test approaches for increasing the incorporation of health and safety improvements as part of energy efficiency work scopes.

- ***Marketing strategy recognizing the wide differences around New York State.***
A statewide marketing campaign is being developed recognizing geographic and demographic differences throughout the state. Those differences include factors that may influence a customer’s decision to participate in energy efficiency initiatives, such as urban versus rural location, age and type of property, and the stigma associated with being low-income. Along with the NY Energy Advisor website, collateral marketing materials are being developed. Materials will be made available to Community Energy Advisors,⁶ utility outreach staff, community-based organization staff, contractors, etc.
- ***Clean Energy Hubs.*** The Program Administrators expect that engagement and outreach will be a critical component of the Portfolio. In the spring 2021, NYSERDA will release a Request for Proposals to select 10 Clean Energy Hubs across New York State. The Clean Energy Hubs concept was developed in partnership with stakeholders and is intended to connect communities and their residents with relevant programs and resources, ensuring that underserved or disadvantaged communities are provided the information and opportunity to benefit from the clean energy economy. The Clean Energy Hubs will be funded through 2025, which is currently the end of the approved program budgets under the LMI Portfolio.

⁶ Community Energy Advisors are deployed through NYSERDA’s Clean Energy Engagement Program (“CEEP”) and work throughout the State with the goal of connecting residents to available programs. See, Implementation Plan, p. 53, n. 71.