

Statewide Low- to Moderate-Income Portfolio  
Stakeholder Webinar

November 17, 2021  
1:00 PM – 3:00 PM

Summary Report

Filed December 10, 2021

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

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## 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 November 17, 2021.<sup>3</sup> The objectives were to provide stakeholders with an update on the continued development of the Portfolio, including progress since the July 2020 Implementation Plan filing, and to solicit stakeholder feedback. A PowerPoint presentation, filed in conjunction with this report, was given at the stakeholder webinar, and stakeholders were provided time during and after the presentation 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](mailto: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 (“JMC”).<sup>4</sup> Following initial development and implementation of the Portfolio, the 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 LMI Portfolio Stakeholder Webinar

**Date:** November 17, 2021

**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 (“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 Utilities (collectively, “Program Administrators”) on July 24, 2020, filed a statewide Low- and Moderate-Income Implementation Plan (“Implementation Plan”).

<sup>2</sup> 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”).

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

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

## A. Moderator and Presenters

### Moderator

Lisa Romero – NYSERDA

### Presenters

Emily Dean – NYSERDA

Scott Oliver – NYSERDA

Rachel Charow – Con Edison

Annalyssa Sikorski – National Grid

Andrew Neufeld – NYSERDA

## B. Agenda

The webinar covered the following agenda topics:

- Welcome
- Meeting Procedures
- Context
- Overview of Initiatives and Services
- Objectives and Progress to Date
- Affordable Multifamily Energy Efficiency Program
- 1-4 Family Homes
- NY Energy Advisor
- Community Based Approaches
- Stakeholder Engagement
- Next Steps
- Additional Questions and Comments

## C. Survey and Results

On November 22<sup>nd</sup>, the JMC sent a survey to webinar attendees, soliciting feedback on the webinar. There were 13 questions, including questions about attendees' type of organization, location, the webinar format, and specifics about webinar content. There were only 9 responses to the survey.

## 3. Stakeholder Information

The JMC electronically sent invitations to stakeholders who had previously attended a stakeholder meeting and stakeholders 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 October 19, 2021. Due to continued COVID-19 concerns with respect to in-person gatherings, this session was held electronically via webinar.

Webinar participants included DPS Staff, human service and community-based organizations, advocates, local governments, contractors, installers, energy service companies, developers, consultants, and vendors.

There were 146 registrants and 124 attendees. A total 85% of attendees were from New York State and 15% were from out of state. Of the attendees from New York State, 32% were from downstate (NYC boroughs, Westchester, and Long Island), and 68% were from upstate. Attendees represented the following organizations: 19% were from community-based organizations, 12% were consultants, 37% were from government, 2% were direct service contractors, 20% were from utilities, and 10% were listed as “other.”

## 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 Program Administrators changed the process slightly for how questions were managed in this webinar compared with the previous sessions. Instead of answering all questions at the end of the webinar, questions were addressed after three major sections: Multifamily, 1-4 Family Homes, and the NY Energy Advisor. In doing so, attendees’ questions were addressed closer to the time when the material was presented, increasing engagement from attendees.

### A. Questions and Answers Summary

There were a wide variety of comments and questions raised and addressed during the webinar. As noted, questions were answered following the major sections of the webinar: Multifamily, 1-4 Family Homes, and NY Energy Advisor. The questions, responses, and comments are provided below.

### B. General Questions and Comments

Q1. Will the power point presentation be posted?

A1. The power point presentation will be posted on DMM and on the LMI Stakeholder Resource website: <https://www.nyserda.ny.gov/All-Programs/Low-to-moderate-Income-Programs/LMI-Stakeholder-Resources-New-Efficiency-New-York>.

Q2. Will the recording of the webinar be shared with all registrants?

A2. A recording of the webinar will be available upon request via email to [LMIforum@nyserda.ny.gov](mailto:LMIforum@nyserda.ny.gov).

Q3. Will stakeholders be offered an opportunity to provide feedback on the update associated with integration of the New York State Clean Heat (“NYS Clean Heat”) program and Affordable Multifamily Energy Efficiency Program (“AMEEP”) anticipated in January?

A3. We are planning to begin soliciting feedback on the planned approach in December. Feel free to reach out to any of the Program Administrators whose emails are in the presentation to connect or provide additional thoughts.

Q4. Can you reconfirm the date that Community Energy Engagement Program (“CEEP”) will run through?

A4. CEEP contracts will run through June 2022 to provide continuity and overlap with Clean Energy Hubs.

Q5. Would you announce the November 23rd Hub webinar?

A5. There will be the second Regional Clean Energy Hub webinar taking place on November 23<sup>rd</sup> from 1-3pm. For more information, go to Regional Clean Energy Hub webpage on NYSEERDA’s website.

Comment 1: I would suggest that you send out the direct DMM link to registrants. There is nothing intuitive about finding a particular case if you've never used that platform.

Response 1: An email with the link to DMM will be sent via email to all registrants.

Q6. Is there an update on direct access to utility data? We are looking for a direct feed of portfolio data from NYSEG and Con Edison.

A6. Con Edison has a Share My Data program which facilitates third party access to customer data. This program is based on the Green Button Connect national protocol automated data exchange process.

NYSEG & RG&E does not yet have its automated system up and running. We are launching the Energy Manager portal to all NYSEG and RG&E customers at the end of Q4 2021. RG&E and NYSEG customers will not have AMI meters until July 2022, and they are rolling out over 18 months. In the meantime, a manual process has been established.

### C. Multifamily Questions and Comments

Q7. Will there be comprehensive "real-time" or quarterly dashboards so that stakeholders, the public, and the Legislature can see the progress of this program and the geographic areas in which investments are being made?

A7. Results and progress of AMEEP will be reported on the Clean Energy Dashboard.

Q8. Who will the implementation contractor be, and will it be the same contractor statewide?

A8. For upstate National Grid and NYSEG RG&E, the implementation contractor is Rise Engineering. Throughout the rest of the state, the implementation contractor is Willdan. In

instances where a building is serviced by multiple utilities, the electric utility implementation contractor will facilitate the project and will coordinate with the other utility on the “back end.”

Q9. What date will the multifamily program become available?

A9. AMEEP launched November 3, 2021. The JMC is working to integrate electrification measures into the offering in early 2022.

Q10. In New York City, will the comprehensive pathway work with NYC Accelerator?

A10. The Low- to moderate-income program is a tool that can be used by the NYC Accelerator. Members of the JMC have been in collaborative discussions with NYC Accelerator about the program.

Q11. Would there be boiler replacements or would electric replacements only be done?

A11. AMEEP is allowing gas boiler replacements at this time. For electrification, we are working on coordinating the program with NYS Clean Heat. This should be released in January.

Q12. Are the incentives subject to a benefit cost analysis test (e.g., the Total Resource Cost (“TRC”) test)? Or are they subject to any caps relating to project costs?

A12. The projects are not subject to the TRC test or any cost benefit test. Incentives are capped at 85% of total project costs for comprehensive projects. For non-comprehensive projects, incentives are capped at 100% of measure costs and 85% of the total project cost.

Q13. Can the budget allotted be used to address physical or structural barriers to the installation of energy efficiency measures?

A13. Incentives are only for energy efficiency upgrades specifically.

Q14. With the new infrastructure bill, New York State is likely to get a large amount of funding for the Weatherization Assistance Program (“WAP”) -- maybe several hundred million in funding. Since New York State spends about half of its WAP funding on large multifamily buildings, how might you plan on coordinating with Homes and Community Renewal (“HCR”) and the WAP network on serving buildings? For example, can a building get both WAP funding and AMEEP funding?

A14. The JMC plans to coordinate with HCR and acknowledges there is work to be done. The JMC will provide an update once more details are arranged.

Comment 2: In terms of real time data, the Regional Hub and Integrated Energy Data Resource (“IEDR”) Programs should be able to greatly increase capacity in this regard.

Q15. Do the energy efficiency upgrades include electrical service upgrades to facilitate electrification of building systems?

A15. Not at this point. Those would be considered “make ready” work for electrification and are not included in the AMEEP program.

## D. 1-4 Family Questions and Comments

Q16. Will there be any distinct attention to 2-4 unit row houses through this program? Incentives for small holding landlords?

A16. 2-4 unit buildings fall within this program. We currently serve these homes. We do not have specific incentives aimed at small holding landlords. The EmPower program had landlords paying a portion of project costs. The rules for EmPower have changed so that if a landlord income qualifies, the portion share is no longer required of them. We are working with several partners to see how we can facilitate working in row houses and are looking at long-term development packages so contractors can easily identify building types and draw up work scopes more quickly especially in areas where there is similar building stock, like downstate row houses.

Q17. Can you define direct install?

A17. Direct Install programs involve a no-cost energy audit during which certain, simple-to-install energy efficient equipment, such as lighting and water-related measures, may be installed.

Q18. Do you have a sense of a timeline for a full LMI heat pump program?

A18. NYS Clean Heat does serve all market segments. In January of 2022, we will have an update to the new AMEEP program so that Clean Heat is integrated into it, and there is coordination between AMEEP and NYS Clean Heat.

NYSERDA is learning a lot through heat pump demo pilots which will inform how we incorporate heat pumps into 1-4 Family Home programs. This is a priority topic for the JMC in the coming year, kicking off in Q1 2022 with the goal to have Program coordination integrated in 2022.

Q19. Are the findings from the LMI electrification pilot available to the public?

A19. The pilot is still underway. NYSERDA has preliminary results. Once the final project is completed, evaluation will start. Results from the pilot will be made public at that time.

Q20. Is there an entity responsible for making sure that applicants get through to EmPower from application development through project completion?

A20. NYSERDA partners with community and locally based outreach organizations to help customers learn about, apply to and get served by eligible programs that meet their needs. NYSERDA currently has an RFP out for the Regional Clean Energy Hubs program. A critical component of the services that organizations awarded under the Clean Energy Hubs RFP will perform is conducting outreach to LMI customers and ensuring applicants who need assistance with the process get the help they need at any stage, whether it is completing the application or finding programs and resources to meet other needs that are not covered by the program. The Hubs are designed to provide robust outreach and awareness, application and case management support, and meet customers where they are, connecting them to services and resources to meet their individual needs.

Q21. Since energy affordability is the main program priority, is rate design being looked at?

A21. The work of this JMC focuses on rate payer funded programs and services. Rate design, therefore, is outside the scope and purview of this work. However, as energy affordability is a critical outcome, it is being discussed and considered both in the context of the State's energy affordability policy and within deliberations of the Climate Action Counsel in advancing recommendations for how we are going to meet both the emissions reductions outcomes of New York's Climate Leadership and Community Protection Act as well as the equity and disadvantaged communities benefits.

Q22. Is there a maximum budget for health and safety for the 1-4 Family homes program or the other programs?

A22. We handle health and safety on a project-by-project basis. We look more at the total project savings. We include health and safety when we look at the overall worthiness of the project. As such, there might be a very large project that has higher health and safety amounts because there will be greater energy savings, whereas there are some smaller projects where we wouldn't be able to do as much health and safety work because there are lower energy savings. We are looking at the projects at a more holistic project level than a measure-by-measure level.

Q23. For comprehensive work how will you handle the displacement of tenants?

A23. The work we have done in the program so far has not displaced tenants. Most of the insulation work is done outside of the building and most of our projects take only a day or two, though some are bigger. We don't have budgeted funds for displacement.

Q24. How will these inspections integrate with the weatherization program?

A24. The EmPower program has worked with WAP for years. We have coordinated and worked with weatherization contractors to participate in EmPower. We have worked hard with HCR to coordinate those two programs.

Q25. Will this include the benchmarking of buildings? And if so, how will the data flow from utilities and energy companies work?

A25. For the 1-4 Family Program, we don't have any plan to do benchmarking for single family buildings. Benchmarking data has not been integrated into AMEEP at this time; the JMC may explore ways to leverage this data in the program in the future.

## E. NY Energy Advisor Questions and Comments

Q26. Will the NY Energy Advisor include funding outside of NYSERDA?

A26. The NY Energy Advisor site is a collaboration with funding provided by NYSERDA and the Utilities. The site will provide a full menu of program and service offerings eligible to the site user based on information they provided and would serve all organizations offering these programs across the State.

Q27. What is the link for the NY Energy Advisor?

A27. <https://energyadvisor.ny.gov/>

Q28. For the NY Energy Advisor, what will you get back if you don't income qualify? Can building owners or local governments fill this out (local governments in the instance there was a building performance mandate)?

A28. We will update the website on a regular basis and encourage users to come back periodically to check if new programs are available for which they may qualify. In the event that a user is not eligible, we will send them to NYSERDA's website or their utility website to explore on their own. If new mandates become required, we will update the site accordingly to match those mandates. The ultimate goal of the site is to serve homeowners, renters, and affordable property managers in the LMI customer segment. This is not a "set it and forget it" website, this is meant to be dynamic with the ever-changing energy landscape.

The site, however, is not currently built to offer all market rate programs for those outside of eligibility criteria. In the case that someone is not eligible for LMI programs, they will be taken to NYSERDA's site or their utility site to look into what programs they may be eligible for.

Q29. How will this page interact with the upcoming Clean Energy Hubs? Will the Hub replace CEEP as a resource on NY Energy Advisor?

A29. No. We worked closely with the clean heating and cooling team. This website will not replace that. The results served to the end-user will be integrated into the results on NY Energy Advisor based on income eligibility. The websites are not meant to be interchangeable but used in tandem. This is meant to be a tool for the Clean Energy Hubs to make programs more accessible and will complement forthcoming NY Energy Advisor marketing activity. Marketing and a one-stop-shop website are vital tools to streamline customer access, in concert with person-to-person outreach and engagement currently provided under CEEP, and to be provided by the Clean Energy Hubs, once those are established.

Q30. I just went to the website. I used my own home to walk through the steps. It asks who is my natural gas provider, and my provider is not listed. How would I move forward if who provides my natural gas is not listed? This would be everyone who has natural gas in St. Lawrence County.

A30. For those who view and try the website and don't find their local utility, please send an email to [lmiforum@nyserda.ny.gov](mailto:lmiforum@nyserda.ny.gov).

Q31. Will WAP, HEAP, LIHWAP and any/all other federally funded programs be added to the resources?

A31. The resources page is being built out and is in the testing phase. If there are additional resources that would be beneficial to LMI customers, then stakeholders may send them through to the team at NYSERDA and we will add them if it makes sense for end users.

This will be an evolving tool for everyone to use. The end goal is to assist LMI customers in the State. If the resources page gets too long, we will redesign in order to organize information better.

Q32. It seems like this service will duplicate what CEEP is currently doing and what the Regional Hubs are intended to do. Might it make sense to invest resources in helping each Hub develop a

site that can do this? Or produce a site that all Hubs can use? I fear that the fragmentation of communications will undermine all our efforts.

A32. The NY Energy Advisor is meant to complement and be a resource to aid the community-based, person-to-person outreach and engagement provided currently through CEEP and, subsequently, the Regional Clean Energy Hubs.

Q33. Will it be mobile friendly?

A33. Yes. The site was designed with a mobile first approach. Given that a large number of LMI customers use mobile devices, we had to keep that in mind when designing the site and user experience.

Q34. How can we provide specific feedback on the site? I also went through it and noticed a few things that could be improved.

A34. Email the [LMIforum@nyscrda.ny.gov](mailto:LMIforum@nyscrda.ny.gov) with suggestions on the NY Energy Advisor website.

Q35. Will this website be available in other languages?

A35. Yes, there will be the ability to translate the website eventually, and we are working on that plan now. It is expected to be available as soon as possible around the time when the site officially launches. The marketing with the launch is expected to be carried out in the most commonly spoken languages in each utility territory.

There is a comprehensive plan to launch and include a collaborator toolkit which will be distributed to organizations. The launch will include pitching stories to local media outlets to talk about how NYSERDA and the Utilities are working together to bring income eligible programs and services to them, and the toolkit/press related items will be translated where applicable.

Further, in order to track analytics, we want to make sure we are developing a media plan to launch via multiple outreach mechanisms, and we want to launch it all together rather than it trickling out.

Q36. When is the official launch?

A36. The site is now available. It is now in the test phase. The official launch date is currently TBD. We are actively working through the automatic results email coding, language translation process as well as determining when to send a press release out. Given we are close to the end of the year, we may wait to do the official launch until January 2022. Those discussions are happening now.

Q37. Who should we contact to suggest useful programs to be added to the NY Energy Advisor website? For example, the NYC Accelerator program , which is a City program offering free technical guidance to building owners to reduce their energy use and GHG emissions?

A37. Email the [LMIforum@nyscrda.ny.gov](mailto:LMIforum@nyscrda.ny.gov) email address.

Comment 4: I noticed that the CEEP appears as a tile. Perhaps it would make more sense to list CEEP providers/Community Energy Advisors (and later Hub contacts) as contact people for more information or assistance. CEEP does not itself provide funding.