

Statewide LMI Portfolio Stakeholder Webinar

18-M-0084 Comprehensive Energy Efficiency Initiative
(New Efficiency: New York)

Presented by the New York Utilities and NYSERDA

June 22, 2022



Meeting Procedures

Before beginning, a few reminders:

> All attendees will be muted

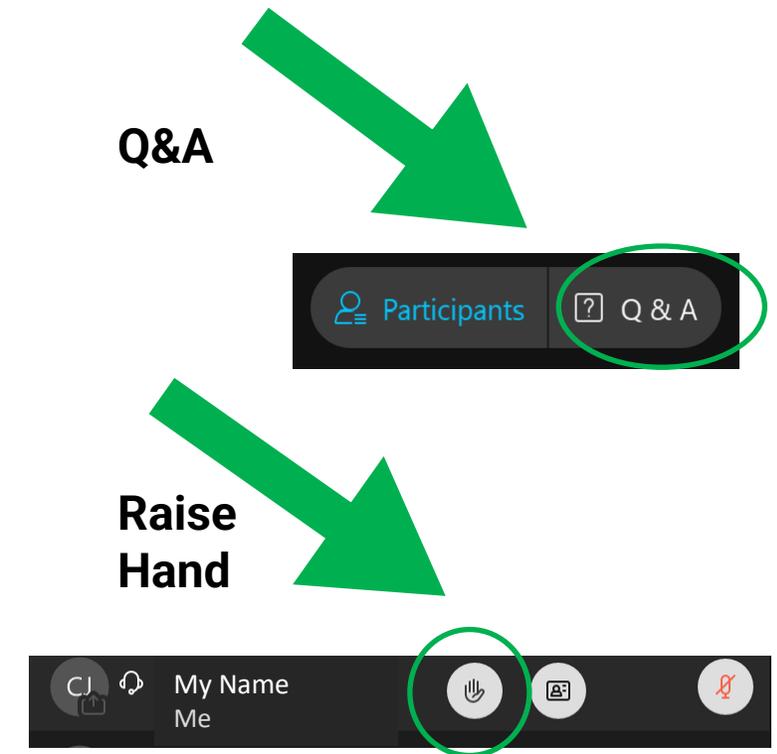
> For questions or comments throughout, please use either the Raise Hand or Q&A functions. It is suggested to use the written Q&A function if possible. To use Raise Hand:

1. Open your participant panel using the oval icon in the bottom right of your WebEx screen.
2. Hover your mouse over your name in the Participants list in order to see the “Raise Hand” icon, found just below and to the right of your name.
3. Click on the raise hand icon to indicate you have a question.
4. When the moderator calls on you and indicates you are unmuted, you may ask your question verbally.
5. When you are finished talking, please select the “Raise Hand” icon again to lower your hand.

> The Q&A function is private, and the team will share public responses as appropriate

> Slides and a summary report of the Webinar, with Q&As, will be posted after the meeting. This meeting will be recorded, and the recording will be available upon request to LMIForum@nyserda.ny.gov.

> If technical issues arise, please contact John Necroto @ (John.Necroto@nyserda.ny.gov)



Agenda

- Welcome and Meeting Procedures
- Context
 - NYS Policy Landscape
 - LMI Portfolio Objectives
- Overview of Programs and Services: Progress and Near-Term Priorities
 - 1- 4 Family and KEDLI HEATSM Moderate Income Pilot
 - PAUSE FOR Q&A*
 - Affordable Multifamily Energy Efficiency Programs and Partnerships
 - PAUSE FOR Q&A*
 - Regional Clean Energy Hubs
 - NY Energy Advisor
- Questions and Comments



Context

Context

- Implementation of New York's Climate Act
 - Draft Scoping Plan published; 11 public hearings conducted; public comment period extended to July 1
 - Climate Justice Working Group published draft Disadvantaged Communities criteria; 11 public hearings scheduled; open for public comment through July 7
- Legislative Action
 - A7805D/S9409A – New York City Public Housing Preservation Trust Act
 - A10439/S9405 – Advanced Building Codes, Appliance and Equipment Efficiency Standards Act
 - A10493/S9422 – Utility Thermal Energy Network and Jobs Act
 - S8009C/A8009C – State Tax Credit for Ground Source Heat Pump installations

Governor's Two Million Homes Action Plan

- In the 2022 State of the State, Governor Hochul directed NYSERDA, DPS, HCR, and DOS to jointly produce an executable plan with funding proposal in 2022.
- Goal: Plan to achieve 2 million climate-friendly homes/apartments by 2030 including 1 million electrified and 1 million electrification-ready – and to serve more than 800,000 (40%) low-to-moderate income households with these upgrades.
- The proposal outlines critical policy instruments and interventions needed to achieve this target.

Statewide LMI Portfolio: Mission and Priorities

- The Statewide LMI Portfolio is designed to create a holistic and coordinated approach to deliver energy efficiency to LMI customers and communities in New York by:
 - improving the experience of, and ultimate benefit for, LMI customers seeking to access clean energy services;
 - reducing administrative costs and increasing the impact of ratepayer funding; and,
 - providing more consistent and streamlined participation for service providers.



Overview of Programs and Services: Objectives and Progress to Date

Summary of Initiatives and Services

Initiatives and Services addressed in the Implementation Plan, Annual Report, Program Activity:



**1-4 Family
Homes**



**Affordable
Multifamily
Buildings**



**Affordable New
Construction**



**Community-
based
Approaches**



**Heat Pump
Adder Demo**



**Awareness and
Education**



Pilots

2021 Statewide Initiative Review⁺



1-4 Family Homes

- 17,077 households served
- \$74 million total expenditures
- 7,767 gross annual MWh savings
- 324,105 gross annual MMBtu savings



Affordable Multifamily

- 9,867 participants served*
- \$25 million total expenditures
- 19,506 gross annual MWh savings
- 281,248 gross annual MMBtu savings



Affordable New Construction

- 1,183 participants served
- \$3.8 million total expenditures
- 4,049 gross annual MWh savings
- 27,766 gross annual MMBtu savings

+Data from 2021 Annual Report, refiled May 31, 2022.

*In some cases, Program Administrators defined program participants in multifamily initiatives differently in 2021. Starting in 2022, Program Administrators aligned on the definition, with “participant” defined as dwelling units served in statewide programs.



1-4 Family Homes

1-4 Family Homes Programs



Objectives

- Improve overall energy affordability for LMI households
- Increase the number of LMI households receiving energy efficiency services
- Address beneficial electrification needs as part of energy efficiency work scopes

Features

- Statewide program funded through the CEF and utility incremental funds
- Includes comprehensive energy efficiency upgrades (insulation, air sealing, electric load reduction, health and safety improvements, comprehensive energy audit, and in-home energy education)
- Direct install to serve as a feeder into more comprehensive work

Timeline

- Utility/NYSERDA coordination and funding launched Q4 2021
- Roll out of fully integrated EmPower+, estimated **2023**

1-4 Family Homes EmPower+



Aligned existing statewide 1-4 Family Homes framework of EmPower New York and Assisted Home Performance with ENERGY STAR® and merging to reach more households and achieve economies of scale.

Progress to date

- Launched streamlined program offerings to further align EmPower and Assisted Home Performance
- Launched Direct install for moderate-income households
- Online application has exceeded expectations for customer intake, available in 40+ languages
 - Enhancements that increase access for Utilities and NYSERDA contracted entities to directly assist customer.
- Ongoing work to align with HEAT and PSEG programs (on Long Island)
- Engaged in discussions to improve customer referrals

Upcoming

- June 2022 – Paper application translated to Spanish, assessing additional translations
- 2023 - Project Workflow System redesign and further system integration and EmPower+ Launch

1-4 Family Homes

Health and Safety Equity



Background and Objectives:

- Launched by National Grid December 2021 to run through end of December 2022 in the KEDNY and KEDLI territories
- An enabling strategy that leverages limited shareholder funding to provide full cost covered remediation services of health and safety issues present in LMI customer's homes that are preventing weatherization and energy efficiency efforts

Measures:

- Prescriptive
 - Ventilation (heat recovery, bathroom/kitchen fans)
 - Carbon Monoxide detectors
 - Clean & Tune for natural gas equipment/appliances
 - Septic and plumbing issues
 - Roof repair/replacement
- Custom
 - Suspected knob and tube wiring
 - Suspected Asbestos and Vermiculate Hazards
 - Suspected Mold
 - Suspected electrical issues
 - Bulk moisture controls
 - Pest/rodent control

1-4 Family Homes

KEDLI HEATSM Program Description and Scope



- The Home Energy Affordability Team (HEATSM) is National Grid's income-eligible energy efficiency program. HEATSM provides:
 - No-cost Home Energy Assessments (both virtually or on-site), Health and Safety Testing.
 - Certain no-cost energy savings products:
 - Programmable or Nest smart thermostats
 - Low-flow faucet aerators and showerheads
 - Weather stripping, duct sealing, and air sealing of leaks
 - New carbon monoxide and smoke detectors
- Referrals may be made by HEAT to the National Grid Equity Proposal Program for further assistance to mitigate conditions perceived to be barriers to the installation of weatherization measures.

1-4 Family Homes

KEDLI HEATSM Moderate Income Pilot



Customer Income Segments

Low Income

100% Subsidy

Applicant meets HEAP eligibility income qualifications. Eligibility and benefits are based on income, household size, the primary heating source, and the presence of a household member who is under age 6, age 60 or older or permanently disabled. [NYS Home Energy Assistance Program \(HEAP\)](#)

Moderate Income

Tier 1

75% Subsidy

Applicant's total annual income as the **account holder** must be within this range:
\$58,112 - \$66,685

Tier 2

50% Subsidy

Applicant's total annual income as the **account holder** must be within this range:
\$66,686 – \$76,212

Tier 3

25% Subsidy

Applicant's total annual income as the **account holder** must be within this range:
\$76,213 - \$95,264

Break for Q&A





Affordable Multifamily Energy Efficiency Programs

Affordable Multifamily Buildings - Overview



Objectives

- Deliver and scale the statewide affordable multifamily program
- 40% of incremental energy efficiency utility funds directed to affordable multifamily

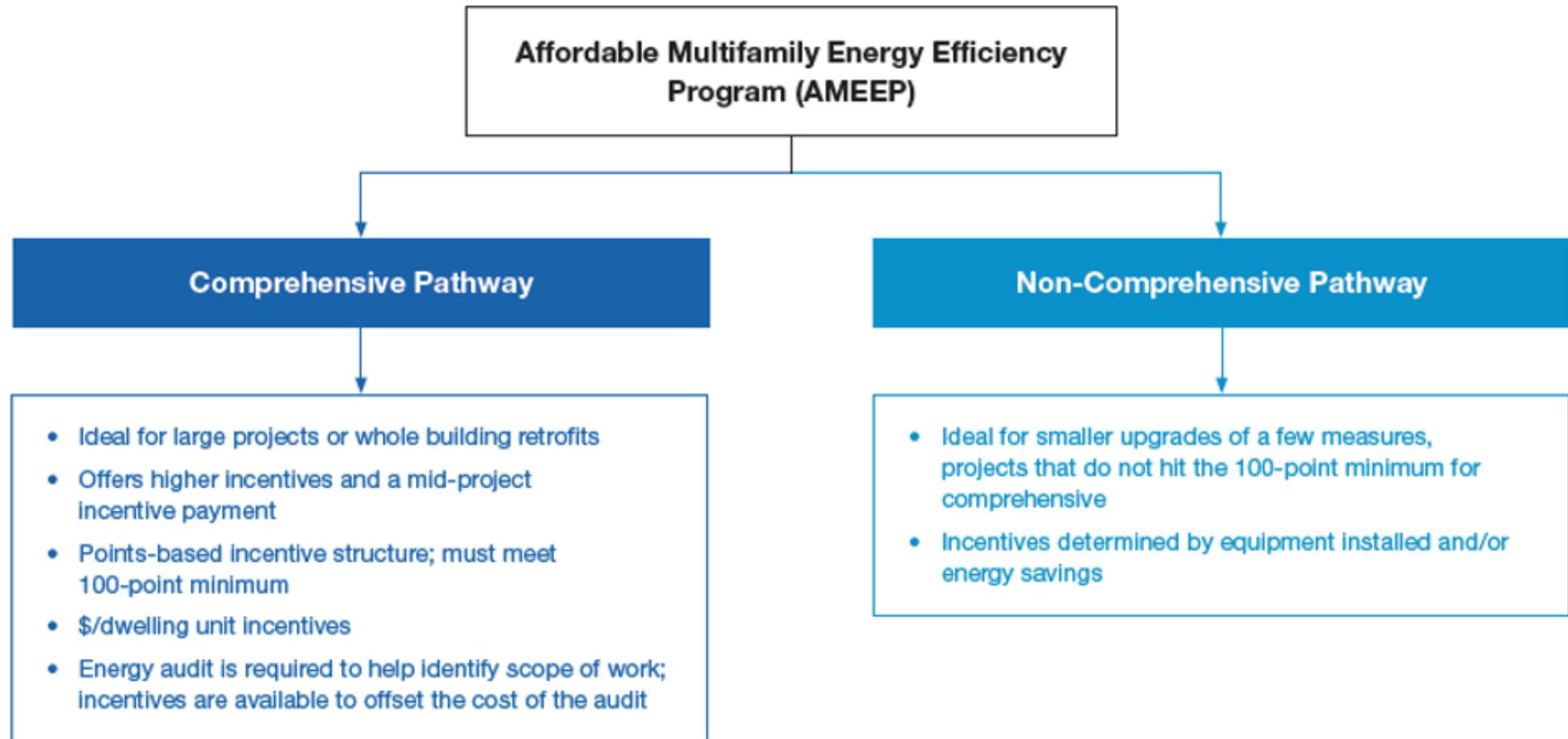
Features

- Flexibility to pursue prescriptive or custom measures, direct install, and/or comprehensive projects
- Robust incentive to encourage comprehensive projects
- Technical assistance through coordination with NYSERDA's FlexTech program
- Streamlined and consistent customer journey

Progress

- Launched statewide Affordable Multifamily Energy Efficiency Program (AMEEP) in Q4 2021
- Launched Participating Contractors & Industry Partners webinar series for AMEEP in Q2 2022
- Continuing to fine-tune AMEEP processes and scale program growth, including driving comprehensive project participation

Program Overview





Affordable Multifamily Buildings

AMEEP Progress Updates

- ✓ Launched AMEEP statewide on November 3, 2021
- ✓ NYSERDA's Multifamily Performance Program (MPP) has phased out of the market and stopped accepting new applications as of February 4, 2022
- ✓ Launched the Participating Contractors & Industry Partners (PC&IP) webinar series
- ✓ Issued updated versions of the Program Manual to fine-tune processes and technical requirements
 - Program Manual updates will be released at the beginning of every quarter (July and October for the remainder of 2022)
- ✓ Launched Statewide AMEEP resources web page

PC&IP Webinar Series



Purpose

For the JMC to present on new or upcoming Program Manual changes with PC&IP members and hold discussions about the program

Participants

Current and prospective participating contractors and energy service providers

Hosts

Utilities and the program implementors, and NYSERDA

Frequency

2 sessions per quarter while AMEEP is still new:

1. Beginning of the quarter, following the release of an updated program manual
2. The month prior to the end of the quarter

Schedule

Past sessions: April 8, May 20

Upcoming session: July 18

Future Plans for AMEEP



Operations

- Increase comprehensive project participation
- Encourage installation of deep energy efficiency upgrades (*e.g.*, envelope, non-lighting electric measures)
- Streamline eligibility checks

Outreach

- Develop more online and print marketing
- Provide program materials in multiple languages
- Foster strategic partnerships (*e.g.* housing agencies, community-based organizations)

Design

- Integrate electrification measures into AMEEP through collaboration with the NYS Clean Heat program and DPS Staff
 - Seek stakeholder feedback on proposed program structure and guidelines

Additional Resources



Lead Intake form

To submit an interest form:

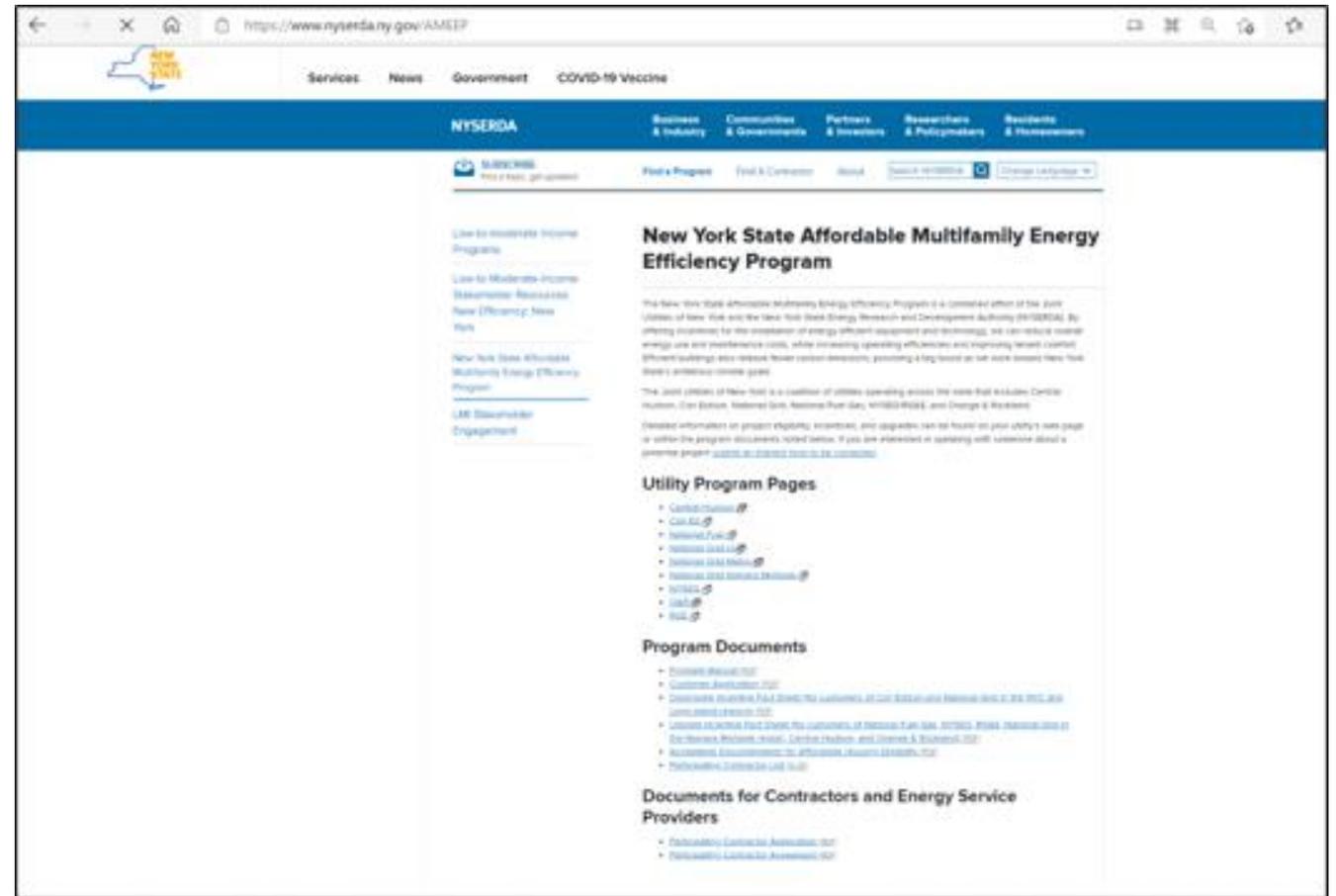
<https://nyserda.seamlessdocs.com/f/NYSAffordableMultifamilyBuildingEnergyEfficiencyProgram>

For additional program resources, such as the program manual and application forms, visit the AMEEP resource page:

<https://www.nyserda.ny.gov/AMEEP>

Direct link to Program Manual:

<https://www.nyserda.ny.gov/-/media/Migrated/Files/Programs/LMI/NYS-Affordable-Multifamily-Energy-Efficiency-Program-Manual.ashx>



Affordable Multifamily Buildings

Technical Assistance



- Technical assistance, which includes an energy audit, is required for AMEEP comprehensive projects
- Funding will be provided through NYSERDA’s FlexTech program to reduce cost of audit to customer (see table for full list of FlexTech services).
- Audits are conducted by approved Energy Providers before a project begins to help identify EE opportunities and determine an initial scope of work. Approved Energy Providers are:
 - [NYSERDA Multifamily Building Solutions Providers](#)
 - [NYSERDA FlexTech Consultants](#)
- If building has gone through an eligible energy audit in the past 5 years, they may be exempt from this requirement
 - Applicants will need to submit copy of the dated audit, along with description of which EE measures have already been started or completed

FlexTech Primary Services
Level 1+ Energy Study
Targeted / Comprehensive Energy Study
Targeted / Comprehensive RCx Study
Climate Action Plan / Sustainability Plan
Climate Heating & Cooling Study
Energy Master Planning
Energy Advisor Services
Energy Storage
Multifamily Low Carbon Capital Planning
FlexTech Supporting Services
Greenhouse gas emission inventory
Installation of permanent meters or sub-meters
Investigation of renewable energy technologies



Technical Assistance for AMEEP Projects

Level of Audit Required	Other Types of Audits Supported	Level of Audit Cost Covered
ASHRAE Level I + (as defined by NYSERDA's FlexTech program)	<ul style="list-style-type: none">• ASHRAE Level II• Integrated Physical Needs Assessment• Audits meeting current Multifamily Performance Program requirements	<ul style="list-style-type: none">• 50% of audit cost paid at audit completion• Additional 25% of audit when the building moves forward with a comprehensive retrofit project with their utility• Overall cost share cap will not exceed 75% of the study cost• Customer covers remaining costs of audit

Technical Assistance - Streamlined Approach

AMEEP Application – designed to cover both AMEEP and FlexTech program requirements.

Shared Data - Joint Utilities and NYSERDA have a data platform to share program deliverables, so customers do not have to submit the same deliverables to multiple entities. Once customers submit their program deliverables, we will share those deliverables with the other entity to meet the program needs.

Aligned Eligibility - Buildings that pay System Benefits Charge on gas but not electric and need technical assistance may be eligible to participate in FlexTech, provided they are going through AMEEP.

Additional Cost Share – FlexTech projects that receive an AMEEP Notice to Proceed may get the additional cost share up to 75% of the study costs provided the Notice to Proceed is issued within 6 months of the Final Report approval.



Partnerships with Affordable Housing Agencies

Affordable Housing Partnerships - Overview

- NYSERDA is working on various decarbonization and electrification initiatives in partnership with 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).
- Through these innovative partnerships, NYSERDA resources will position affordable housing agencies to decarbonize their portfolios more quickly, and achieve significant progress towards Governor Hochul's Two Million Climate Friendly Homes goal.

Spotlight on NYS Homes & Community Renewal (HCR)

Objectives

- Make clean energy technical assistance and incentives more accessible to affordable housing developers, as a component of housing financing applications
- Support HCR's leadership in building decarbonization, and making it business as usual
- Test new models for weatherizing and electrifying affordable stock within established financing process

Progress to Date

- Decarbonization incentives and performance criteria are embedded into HCR financing RFPs
- Incentives fund heat pump domestic hot water (DHW) heaters, heat pumps for space heating & cooling, and high-performance envelope improvements, along with design support.
- HCR published updated sustainability guidelines signaling all-electric, high-performance as a requirement in future years

Timeline

- Identify and develop collaborations across 1-4 family homes programs
- Next HCR RFP with decarbonization incentives to be released by Q4 2022
- Position HCR to advance decarbonization as a core principle

Spotlight on NYC Department of Housing Preservation and Development (HPD)

Objectives

- Make clean energy technical assistance and grants more accessible to affordable housing developers, integrated into their financing application
- Support HPD's leadership in building decarbonization, and making it business as usual
- Test new models for weatherizing and electrifying affordable stock within established financing process

Progress

- Decarbonization incentives and performance criteria are available to HPD preservation projects via program requirements published on HPD's website.
- Incentives fund heat pump domestic hot water (DHW) heaters and heat pumps for space heating & cooling, along with complementary energy performance improvements and soft cost support.
- NYSERDA-funded technical assistance providers are available to assist project teams with design and implementing decarbonization scopes

Timeline

- Support HPD with capacity buildings, incentives and technical assistance support through 2025
- Decarbonization incentives and program requirements were published in Q4 2021
- Scoping potential New Construction incentive model for release in Q3 2022

Spotlight on NYCHA Clean Heat 4 All Challenge

Objectives

- Compel manufacturers to develop a stand-alone, window-mounted, cold-climate certified packaged window heat pump (PWHP) for New York Housing Authority (NYCHA) housing
- PWHP solution will create an option for more cost-effective and less invasive electrification of multifamily housing in the Northeast US and nationwide.

Features

- Winning RFP respondents will be awarded with purchase orders for 10,000 – 20,000 PWHPs
- Basic PWHP criteria
 - Can be installed by property management/non-specialized staff
 - Plugs into standard 115V 15A wall socket
 - Does not require wall drilling or plumbing for installation
 - Installation does not degrade envelope performance
 - Provides heating down to 0F outdoor temperature
- NYSERDA providing \$12.5MM and NYCHA providing up to \$250MM for purchasing PWHPs

Timeline

- RFP issued by NYPA in December 2021
- Proposals received in March 2022
- Scoring committee conducted proposal review in May 2022
- NYPA to announce awardees in August 2022
- NYCHA and NYPA to begin installation of PWHPs in Q2 2023.

Break for Q&A





Regional Clean Energy Hubs

Community-Based Approaches

Regional Clean Energy Hubs



- NYSERDA issued competitive solicitation in September 2021, with a deadline of January 2022.
- Multi-sector with focus on residents, affordable multifamily, and small business in disadvantaged communities, as identified in association with the Climate Act and including hard to reach, underserved rural communities, and other areas with high levels of poverty and limited access to resources.
- Up to \$53 million allocated over 4 years to establish Clean Energy Hubs in each economic development region of NYS.
- Funded through Clean Energy Fund (Statewide LMI Portfolio) and Regional Greenhouse Gas Initiative.
- Delivered through Community Based Organizations and non-profit organizations with demonstrated reach in disadvantaged communities; 12 hubs in total (3 in NYC).
- Currently in contracting process for Regional Clean Energy Hubs.

Regional Clean Energy Hubs: Objectives



- Increase:
 - awareness of and access to clean energy solutions and opportunities.
 - consumer uptake of clean energy projects, with support for accessing wrap around (non-energy) services and resources.
 - public participation in energy planning and program coordination activities.
 - partnerships with clean energy partners, affordable housing providers, non-energy partners, third-party funding providers, philanthropic organizations, etc. that result in scalable activities and projects.
 - diversity of participating contractors in the clean energy sector; and
- Support career pathways for individuals currently residing in disadvantaged communities or from priority populations, through partnerships with training, education, and clean energy businesses for employment opportunities in the clean energy workforce.
- Advance local capacity to engage with community members about clean energy policy, technologies, and opportunities.

Community-Based Approaches

Regional Clean Energy Hub Timeline

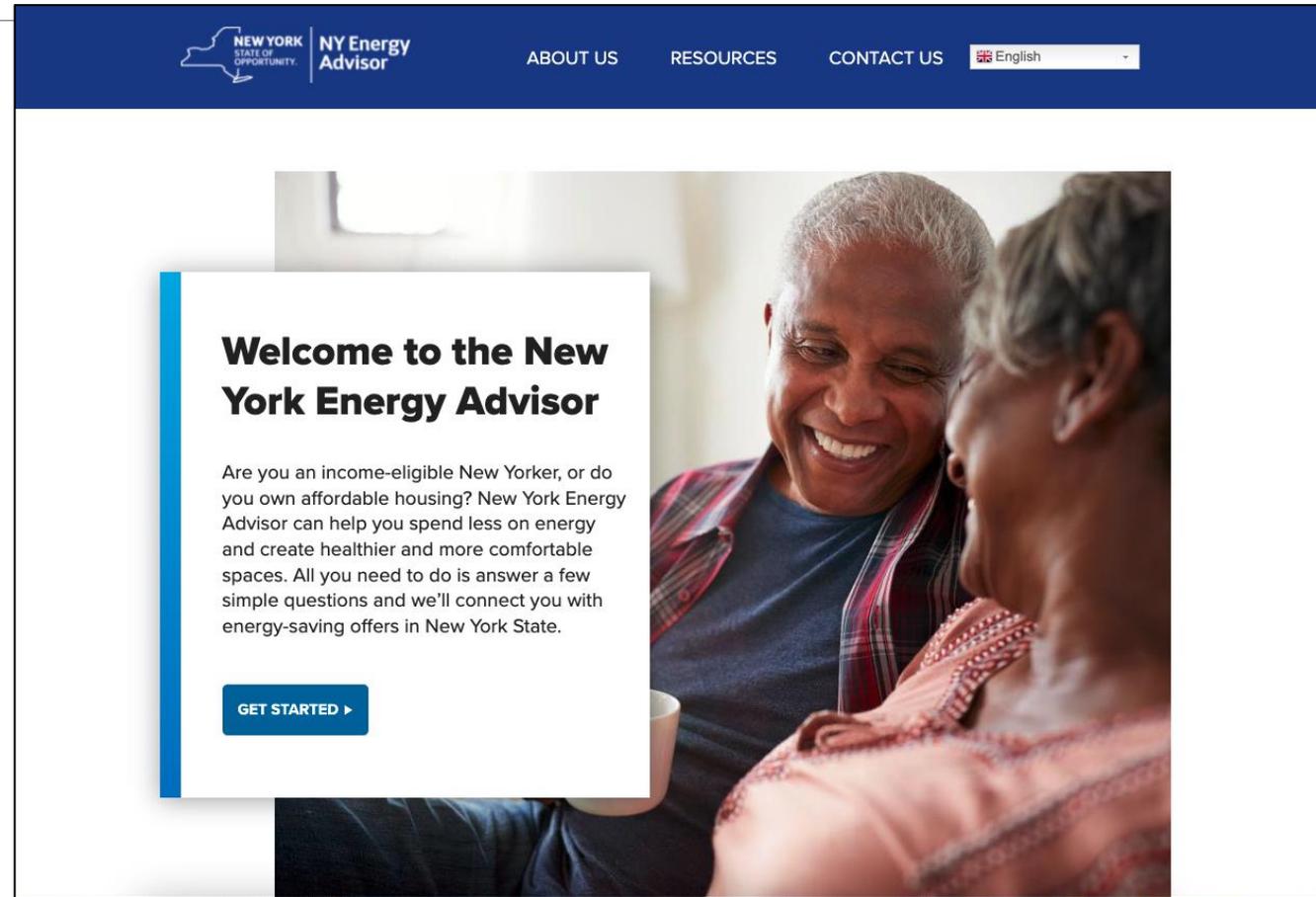
Month	Milestone
May/June 2022	Contract negotiations
July 2022	Hub Launch (12 Hubs)
August 2022	Hub Launch (Mohawk Valley)
September 2022	Statewide Hub Meeting hosted by NYSERDA
November 2022	Draft Regional Assessment and Barriers Analysis
December 2022	Outreach and Equitable Engagement Plan



NY Energy Advisor

NY Energy Advisor

- Marketing campaign launched to support the website
- Off to a strong start
- Assumptions on user behavior are being confirmed by our real-time dashboard and analytics.
- Evaluation of user behavior to optimize and improve NY Energy Advisor's value



Marketing Campaign Snapshot

Primary Objective:

- Drive traffic to the NY Energy Advisor website so income eligible households and affordable property owners can discover energy efficiency and additional program resources available to them.

Secondary Objective:

- Drive quiz starts that will connect consumers with assistance programs.

What's Next:

- Campaign evaluation and optimization
- [Social Media Toolkit](#) analysis
- Earned Media
- Production of posters and fact sheets to distribute across the state
- User testing to help improve the site's functionality, access, and overall user experience

NY Energy Advisor Statistics

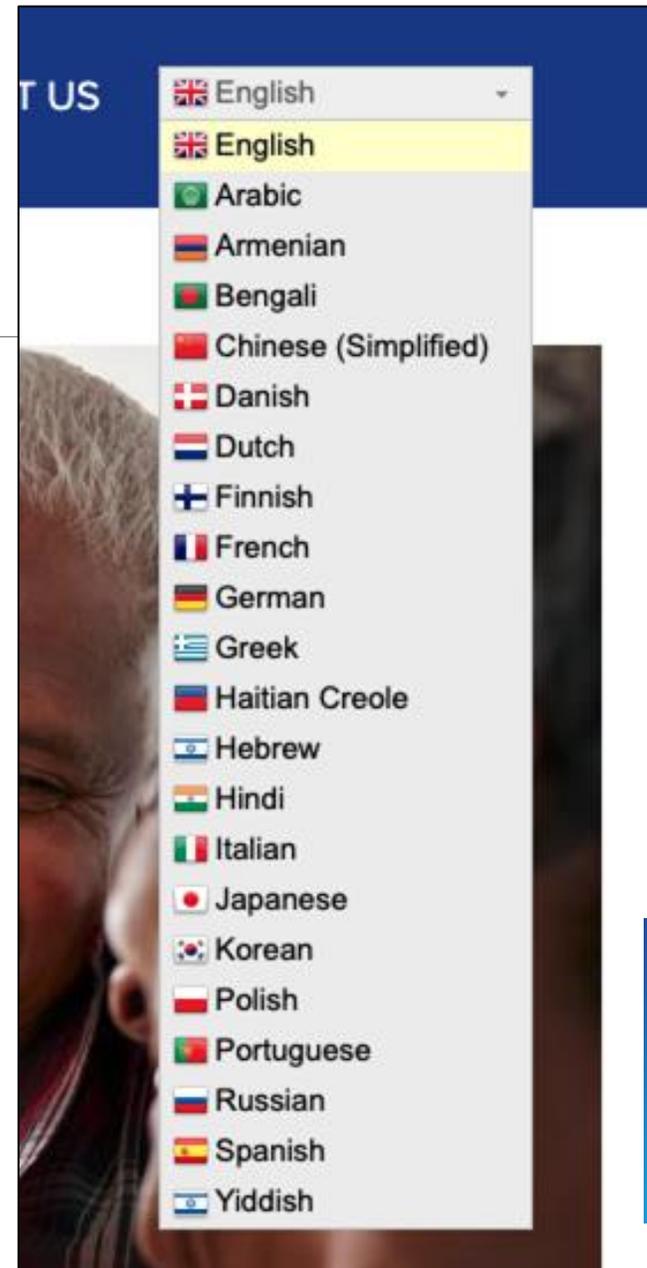
- 333,000 + site sessions
- 215,000 unique users
- Above average click-thru rates on the 4 most spoken languages in the State (English, Mandarin, Spanish, and Russian)
- 70.9% of users access site from a Mobile device validating the mobile-first approach to building out the site.



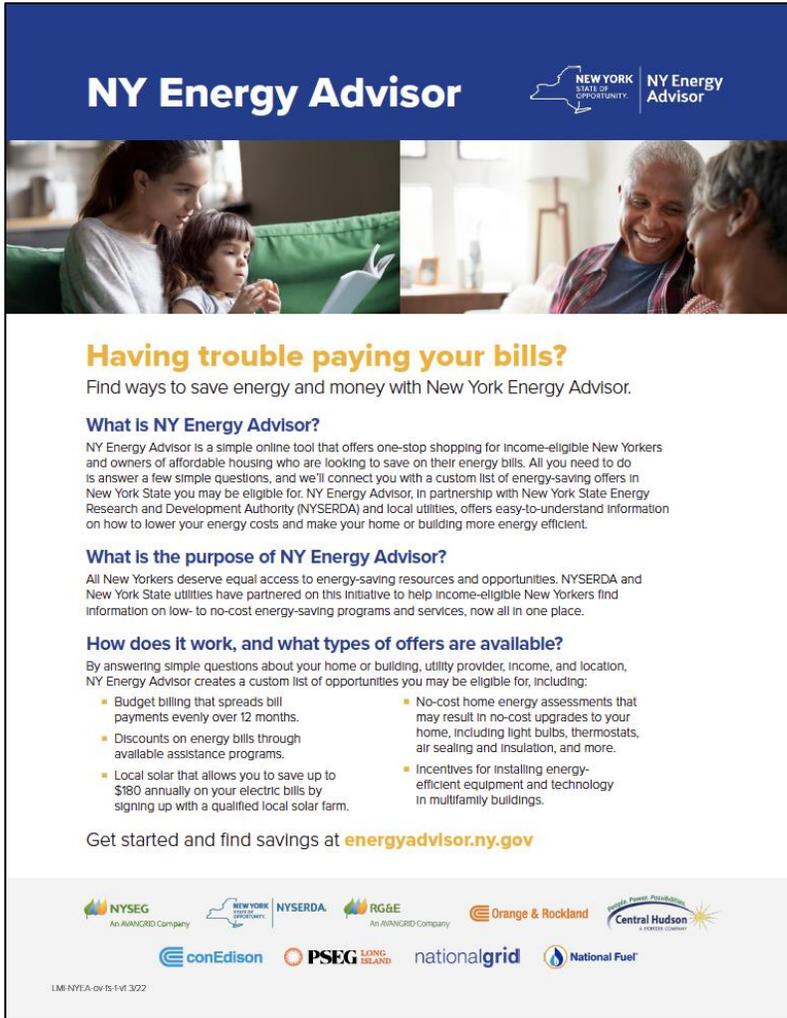
NY Energy Advisor

Translated Resources

- Website features translator tool with multiple language translation options.
- Creative assets, including collateral materials, support the State's most-spoken non-English languages—Spanish, Mandarin, and Russian.
- Assets drive to pre-translated URLs
- Click-thru rates are high on all the top spoken languages.



Resource Materials



NY Energy Advisor  NY Energy Advisor



Having trouble paying your bills?

Find ways to save energy and money with New York Energy Advisor.

What is NY Energy Advisor?
NY Energy Advisor is a simple online tool that offers one-stop shopping for income-eligible New Yorkers and owners of affordable housing who are looking to save on their energy bills. All you need to do is answer a few simple questions, and we'll connect you with a custom list of energy-saving offers in New York State you may be eligible for. NY Energy Advisor, in partnership with New York State Energy Research and Development Authority (NYSERDA) and local utilities, offers easy-to-understand information on how to lower your energy costs and make your home or building more energy efficient.

What is the purpose of NY Energy Advisor?
All New Yorkers deserve equal access to energy-saving resources and opportunities. NYSERDA and New York State utilities have partnered on this initiative to help income-eligible New Yorkers find information on low- to no-cost energy-saving programs and services, now all in one place.

How does it work, and what types of offers are available?
By answering simple questions about your home or building, utility provider, income, and location, NY Energy Advisor creates a custom list of opportunities you may be eligible for, including:

- Budget billing that spreads bill payments evenly over 12 months.
- Discounts on energy bills through available assistance programs.
- Local solar that allows you to save up to \$180 annually on your electric bills by signing up with a qualified local solar farm.
- No-cost home energy assessments that may result in no-cost upgrades to your home, including light bulbs, thermostats, air sealing and insulation, and more.
- Incentives for installing energy-efficient equipment and technology in multifamily buildings.

Get started and find savings at energyadvisor.ny.gov



LMI-NYEA-09-15-1-v1.3/22

Fact Sheet



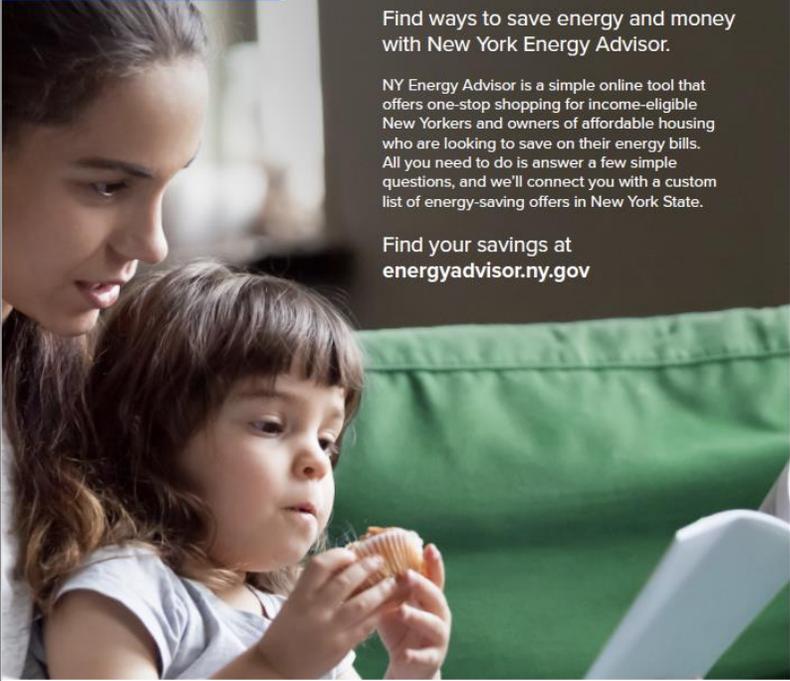
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Find your savings at energyadvisor.ny.gov





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Poster



Stakeholder Engagement

Follow-up and Future Engagement

Pre-Meeting

- Post stakeholder meeting announcement on DMM
- Agenda topics provided in announcement
- Opportunity to submit questions on agenda topics in advance of meeting

Post-Meeting

- Links mentioned in presentation will be sent to attendees via email within the next week.
- Within four weeks of meeting:
 - Presentation posted to DMM
 - Questions and responses posted to DMM
- Stakeholder engagement documents are also found on the NYSERDA website

Upcoming

- Next stakeholder engagement event proposed for November 2022
- Opportunity to submit comments prior to the Webinar or in-person session

Ongoing

- Stakeholder input will be sought throughout initiatives and services design and calibration process
- Feedback and questions may be directed to LMIForum@nyserda.ny.gov
- Stakeholder resource website: <https://www.nyserda.ny.gov/All-Programs/Programs/Low-to-moderate-Income-Programs/LMI-Stakeholder-Resources-New-Efficiency-New-York>

Questions and Comments



Presenters

- Ben Davis, Concentric Energy Advisors – bdavis@ceadvisors.com
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Thank you

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