

# Statewide Low- to Moderate-Income Portfolio Implementation Plan

## Version 5

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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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## Version History and Description of Revisions: New York LMI Portfolio Implementation Plan

Date Filed	Version	Topic	Description of Change	Section/ Page in Implementation Plan
11/1/2024	5	General Updates	Material throughout this Plan has been updated to current status of the Portfolio, including related to current status and future plans for Portfolio initiatives and offerings, Budgets and Benefits information, milestones, Benefit Cost Analysis (“BCA”), Evaluation, Measurement, and Verification (“EM&V”), etc.	Throughout Implementation Plan
11/1/2024	5	EE/BE Proposals	Update of status on Energy Efficiency and Building Electrification Proposals proceeding	Section 1.2
11/1/2024	5	Building Electrification Terminology	Change from use of term “Beneficial Electrification” to “Building Electrification”	Throughout Implementation Plan
11/1/2024	5	Energy Affordability Pilot	Description of Energy Affordability Pilot Program	Section 2.2
11/1/2024	5	Inflation Reduction Act (“IRA”)	Additional description on IRA funded incentives, programs, and tax credits	Sections 2.2, 4.1
11/1/2024	5	1-4 Family Programs	Updated information on 1-4 Family Programs, including EmPower+, National Grid’s HEAT Program, and PSEG LI’s REAP Program	Section 4.1
11/1/2024	5	Implementation Milestone Updates	Updates to Milestones for applicable sectors	Section 4, 5, 8, Appendix F
11/1/2024	5	Existing Affordable Multifamily Buildings	Updated information on Multifamily Programs, including the Affordable Multifamily Energy Efficiency Program (“AMEEP”)	Section 4.2.1
11/1/2024	5	Multi-Year Affordable Housing Partnerships	Updated information including description of the Resilient and Equitable Decarbonization initiative for Existing Buildings (“REDi: EB”)	Section 4.2.2

Date Filed	Version	Topic	Description of Change	Section/ Page in Implementation Plan
11/1/2024	5	Technical Assistance for Multifamily Buildings	Updated information on Technical Assistance for Multifamily Buildings	Section 4.2.3
11/1/2024	5	Affordable New Construction	Updated information on Affordable New Construction	Section 4.3
11/1/2024	5	LMI Portfolio Marketing	Updates on LMI Portfolio Marketing, including channels and metrics	Section 5.1
11/1/2024	5	Community-Based Outreach, Education, and Engagement Partnerships	Updates on Community-Based Outreach, Education, and Engagement Partnerships, including Energy Equity Collaborative	Section 5.2
11/1/2024	5	Community-Based Customer Engagement and Innovative Outreach Initiatives	Updates on Utility Community-Based Customer Engagement and Innovative Outreach Initiatives	Section 5.3
11/1/2024	5	Benefit Cost Analysis	Updated BCA for Portfolio	Section 7, Appendix E
11/1/2024	5	Evaluation, Measurement, and Verification	Updates to Portfolio EM&V activities, including studies	Section 8
11/1/2024	5	Budget and Benefits Updates	Updates for Portfolio by Program Administrator, including narrative	Appendix C
7/1/2024	4	Verified Gross Savings	Con Edison applied existing realization rates to historical 2022-2023 non-comprehensive savings in AMEEP and applied a determined realization rate of the Efficiency Starter Program to both historical and planned program savings	Section 8.3, throughout Implementation Plan, Appendix C.2, VGS Specification
7/1/2024	4	Budget and Benefits Updates	Con Edison transferred funding from its non-LMI portfolio to the LMI portfolio to support additional gas efficiency projects	Section 3, throughout Implementation Plan, Appendices A-D, H
7/1/2024	4	Budget and Benefits Updates	Con Edison updated 2023 planned gas and electric spend and savings projections to reflect actual 2023 performance. Con Edison	Section 3, throughout Implementation Plan,

Date Filed	Version	Topic	Description of Change	Section/ Page in Implementation Plan
			updated budgets and benefits for 2020-2025 throughout.	Appendices A-D, H
7/1/2024	4	1-4 Family Incentives	Update on incentives for moderate-income customers in EmPower+ Program. Update on NYSERDA launch of Inflation Reduction Act funding.	Section 4.1
7/1/2024	4	Evaluation, Measurement, and Verification	Update on vendor selection process for statewide study of AMEEP.	Section 8.3
7/1/2024	4	VGS Specification	Updates to programs in VGS Specifications (Additional LMI Initiatives for Con Edison and Orange & Rockland). Language updates for clarification.	VGS Specification
11/1/2023	4	Consolidation of Introduction and Overview	Prior Executive Summary was consolidated into Introduction and Overview Section	Section 1
11/1/2023	4	General Updates	Material throughout this Plan has been updated to current status of the Portfolio, including related to current status and future plans for Portfolio initiatives and offerings, Budgets and Benefits information, milestones, BCA, EM&V, etc.	Throughout Implementation Plan
11/1/2023	4	Coordination Points	Material in the former subsection on points of coordination among Program Administrators is now addressed in other sections	Sections 2, 4, 5, and 8
11/1/2023	4	Historical Achievement	Material related to historical achievement in the LMI Portfolio is removed from the Plan as it is addressed in Annual Reports	Throughout Implementation Plan
11/1/2023	4	Table Presentation of Sections	Former three-part tables describing development process of Portfolio initiatives and elements has been transitioned to narrative description given full	Sections 4, 5, and 8



Date Filed	Version	Topic	Description of Change	Section/ Page in Implementation Plan
			implementation status of Portfolio	
11/1/2023	4	NE: NY and CEF Interim Review	Context is provided from July 2023 Order Directing Energy Efficiency and Building Electrification Proposals and implications for Statewide LMI Portfolio	Section 1.2
11/1/2023	4	Portfolio Objectives and Performance Metrics	Previously separate sections on Portfolio objectives and performance metrics have been consolidated into a single section. Similarly, prior Appendix E has been removed, given that Section 2.4 has been expanded to include the prior Appendix E information.	Section 2.4, prior Appendix E
11/1/2023	4	EmPower+ Launch	Content reflects the full launch of EmPower+	Section 4.1
11/1/2023	4	Multi-year Affordable Housing Partnerships	Material on NYSERDA Multi-Year Affordable Housing Partnerships has been put in its own subsection. This material previously was covered in 4.2.1. Affordable Multifamily Energy Efficiency Programs.	Section 4.2.2
11/1/2023	4	RetrofitNY	This Plan reflects the intention to sunset RetrofitNY at the end of 2023	Section 4.2.4
11/1/2023	4	Multifamily LMI Decarbonization Demonstration Projects	A new section on Multifamily LMI Decarbonization Demonstration Projects has been added	Section 4.2.5
11/1/2023	4	Launch of Regional Clean Energy Hubs	This Plan reflects the full launch of the Regional Clean Energy Hubs	Section 5.2
11/1/2023	4	Utility Outreach for EmPower+	Innovative Utility outreach to increase awareness of and participation in EmPower+ has been added as a component in Section 5.3	Section 5.3
6/28/2023	3	Budget and Benefits Updates	Corrections to National Grid budgets and benefits for 2023-2025 throughout the document	Section 3, throughout Implementation

Date Filed	Version	Topic	Description of Change	Section/ Page in Implementation Plan
				Plan, Appendices B-D
5/1/2023	3	Budget and Benefits Updates	Updates to budgets and benefits, including the addition of Appendix B; restated Portfolio and Program Administrator budget and benefit information for historical years; updated budget and benefit projections for future years; additional detail added in Appendix A Table 4; and updates to Program Administrator-specific context regarding budgets and benefits in Appendix C. Update of terms throughout the document from Implementation Plan “targets” to Implementation Plan “benefits.”	Section 3, throughout Implementation Plan, Appendices A-D, H
11/22/2022	3	Budget and Benefit Updates	Updates to budgets and benefits, including restated Portfolio and Program Administrator budgets and benefit information for 2020 and 2021, and updated benefit projections for 2022-2025	Section 3, throughout Implementation Plan, Appendices A-D
11/1/2022	3	Market Conditions	Updated description of market conditions impacting LMI Portfolio, in particular regarding timing and costs.	Executive Summary, Sections 3, 4.1, and 4.2
11/1/2022	3	1-4 Family Program	Updates to 1-4 Family program redesign progress and updates to moderate income program project caps.	Section 4.1
11/1/2022	3	Multifamily Program	Updates regarding AMEEP stakeholder engagement webinars	Section 4.2
11/1/2022	3	Federal Funding	Reference to seeking federal funding to support LMI Portfolio, including Inflation Reduction Act.	Section 4.1
11/1/2022	3	VGS Specifications	Updates regarding VGS Specifications, including to	Section 8, 1-4 Family and

Date Filed	Version	Topic	Description of Change	Section/ Page in Implementation Plan
			address completed evaluation of 1-4 Family program.	Other LMI Initiatives Specifications
11/1/2022	3	Budgets and Benefits Updates	Updated budget and benefit information, including Program Administrator-specific context regarding budgets and benefits	Executive Summary, Sections 1, 3, Appendices A-D
11/1/2022	3	Milestones	Updates to LMI Portfolio Milestones, including status.	Sections 4.1, 4.2, 4.5, 4.6, Appendix F.
8/15/2022	2	Scorecard Program Mapping to Implementation Plan Statewide Categories	Addition of Appendix G tables, which map individual LMI programs as identified in Program Administrators' quarterly scorecard reporting to Implementation Plan Statewide Categories and Sub-Initiatives	Appendix G
8/15/2022	2	Budget and Benefit Updates	Updates to budgets and benefits, including restated Portfolio and NYSERDA budgets and benefit information for 2020 and 2021, and updated projections for 2022-2025	Section 3, Throughout Implementation Plan, Appendices A-D
5/31/2022	2	Budget and Benefit Updates	Updates to budgets and benefits, including restated Portfolio and Program Administrator budgets and benefit information for 2020 and 2021, and updated projections for 2022-2025	Section 3, Throughout Implementation Plan, Appendices A-D
4/29/2022	2	New York policy context for LMI Portfolio	Updates to policy context in New York for LMI Portfolio, including regarding Disadvantaged Communities, the Two Million Homes Action Plan	Throughout Implementation Plan
4/29/2022	2	Achievements since 2020 Implementation Plan	Describes key achievements in advancing Statewide LMI Portfolio since 2020 Implementation Plan	Executive Summary, Throughout Implementation Plan
4/29/2022	2	Coordination Points	Updates on addressing key Coordination Points (data sharing between the Utilities	Section 2.3.1, Throughout

Date Filed	Version	Topic	Description of Change	Section/ Page in Implementation Plan
			and NYSERDA; Evaluation, Measurement, and Verification; Implementation Contractor procurement; Marketing; and Statewide Application	Implementation Plan
4/29/2022	2	LMI Joint Management Committee and Executive Council	Update to Joint Management Committee Process, including establishment of LMI JMC Executive Council	Sections 2.4.2, 2.4.2
4/29/2022	2	Stakeholder Engagement	Updated description of Portfolio stakeholder engagement activities	Section 2.4.3, Throughout Implementation Plan
4/29/2022	2	Performance Metrics	Updated information on performance metrics, including status of providing data	Section 2.5, Throughout Implementation Plan
4/29/2022	2	Eligibility Criteria	Update of Portfolio Eligibility Criteria, including geographic eligibility	Section 2.6, Throughout Implementation Plan
4/29/2022	2	Budget and Benefit Updates	Updates to budgets and benefits, including (1) to reflect performance since 2020 Implementation Plan; (2) key drivers of cost trends; (3) identification of costs efficiencies achieved and being pursued; (4) updated Portfolio and Program Administrator budgets and benefit information	Section 3, Throughout Implementation Plan, Appendices A-D
4/29/2022	2	1-4 Family Homes Initiatives	Updates include: planning to combine EmPower NY Low-income program and Assisted Home Performance with Energy Star moderate-income program into EmPower+ Program, to be launched in 2023; changes to programs including streamlined EmPower application; coordination between NYSERDA and the Utilities, including data sharing and referrals	

Date Filed	Version	Topic	Description of Change	Section/ Page in Implementation Plan
4/29/2022	2	Milestones	Updated current and future milestones for the Portfolio and new appendix mapping 2020 and 2022 Implementation Plan milestones	Sections 4-8, Appendix F
4/29/2022	2	Existing Affordable Multifamily Buildings	Updates include: development and launch of new statewide Affordable Multifamily Energy Efficiency Program (AMEEP) with focus on comprehensive measures and projects; transition of prior Program Administrator multifamily programs to AMEEP	Section 4.2.1
4/29/2022	2	Technical Assistance for Affordable Multifamily Buildings	Updates on NYSERDA FlexTech program, including integration into AMEEP	Section 4.2.2
4/29/2022	2	Template Presentation for Sections	Numerous sections have been reformatted to follow a consistent template	Sections 4.6., 5.1, 5.2, 5.3, 8.
4/29/2022	2	RetrofitNY	Updates include added description and detail on program to advance deep energy retrofits	Section 4.2.3
4/29/2022	2	Affordable New Construction	Updates include added description and detail on NYSERDA affordable new construction initiatives	Section 4.3
4/29/2022	2	Pilots and Demonstrations	Updates include added description and detail regarding NYSERDA LMI pilots and demonstrations	Section 4.4
4/29/2022	2	Building Electrification	Added description and detail regarding pilots, research, and other work to advance the inclusion of heat pump and other building electrification measures in affordable multifamily buildings	Section 4.5
4/29/2022	2	Additional LMI Initiatives	Updates including added description and detail on the New York State Healthy Homes Value-Based Payment Pilot	Section 4.6

Date Filed	Version	Topic	Description of Change	Section/ Page in Implementation Plan
4/29/2022	2	Customer Awareness, Outreach & Engagement	Section 5 Customer Awareness, Outreach & Engagement has been restructured for consistency and clarity	Section 5
4/29/2022	2	LMI Portfolio Marketing	Additional information on LMI Portfolio marketing efforts including: statewide branding, the NY Energy advisor website; hard copy customer education collateral and multilingual communications; community based marketing and paid advertising	Section 5.1
4/29/2022	2	Community-Based Outreach and Education	Information and detail on shift in NYSEDA programs from Community Energy Engagement Program (CEEP) to Regional Clean Energy Hubs	Section 5.2
4/29/2022	2	Community Based Customer Engagement	Updated information on: Utility partnerships with LMI community organizations focusing on measure distribution and education; and neighborhood engagement initiatives	Section 5.3
4/29/2022	2	Coordination with External Program Administrators and Other Organizations	Title change to indicate coordination with organizations other than external program administrators; inclusion of Long Island Power Authority	Section 6
4/29/2022	2	Benefit Cost Analysis	Description and results of revised Benefit Cost Analysis for LMI Portfolio	Section 7, Appendix E
4/29/2022	2	EM&V	Description of EM&V activities since 2020 Implementation Plan, including development initial and revised Verified Gross Savings Specifications; added description on EM&V activity related to assessment of performance metrics	Section 8
7/24/2020	1	Not applicable (NA) as first Implementation Plan	NA	NA

# 1. Introduction and Overview

## 1.1 Implementation Plan for Statewide LMI Portfolio

The New York Utilities<sup>1</sup> and the New York State Energy Research and Development Authority (“NYSERDA”) (together, “Program Administrators”) jointly file this 2024 Implementation Plan (“Implementation Plan” or “Plan”) for the statewide portfolio of energy efficiency programs and initiatives for low- to moderate-income (“LMI”) customers and communities in New York.<sup>2</sup> The Program Administrators oversee the portfolio of programs and offerings in this Plan (“the Statewide Portfolio” or the “Portfolio”) in a holistic and coordinated manner to: (1) improve the experience of, and ultimate benefit for, LMI customers seeking to access clean energy services; (2) reduce administrative costs and increase the impact of ratepayer funding; and (3) facilitate a consistent and streamlined experience for both customers and service providers.

The Portfolio of programs outlined in this Plan advances energy affordability and access to energy efficiency for New York’s LMI residents and communities, while supporting New York State’s nation-leading climate policy to transition to carbon-free electricity systems and dramatically reduce greenhouse gas emissions. The Plan contributes to achieving key goals from the Climate Leadership and Community Protection Act<sup>3</sup> (“Climate Act”), including the requirement that Disadvantaged Communities (“DACs”)<sup>4</sup> receive no less than 35% (with a goal of 40%) of the overall benefits of spending on clean energy programs. The Portfolio seeks to achieve this by focusing on the equity issues that can be most directly addressed by clean energy programs, such as energy affordability, reduced fossil fuel combustion to advance environmental justice, and enhanced community engagement. The Statewide LMI Portfolio also supports the Two Million Homes Action Plan to achieve two million climate-friendly homes – one million

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<sup>1</sup> Central Hudson Gas & Electric Corporation (“Central Hudson”); Consolidated Edison Company of New York, Inc. (“Con Edison”); KeySpan Gas East Corporation d/b/a National Grid (“KEDLI”), The Brooklyn Union Gas Company d/b/a National Grid NY (“KEDNY”), NMPC Power Corporation d/b/a National Grid (“NMPC”)(collectively “National Grid”); National Fuel Gas Distribution Corporation (“NFGDC”), New York State Electric & Gas Corporation (“NYSEG”); Orange and Rockland Utilities, Inc. (“Orange & Rockland”); and Rochester Gas and Electric Corporation (“RG&E”), (collectively, “Utilities”).

<sup>2</sup> This Plan represents an update to prior versions of the Implementation Plan for the Statewide LMI Portfolio, which was first filed in July 2020 (“2020 Implementation Plan” or “2020 Plan”): Case 18-M-0084, In the Matter of a Comprehensive Energy Efficiency Initiative (“NE: NY Proceeding”), Statewide Low- to Moderate-Income Portfolio Implementation Plan (filed July 24, 2020). This Plan generally reflects the same broader context, goals, and approaches that informed and comprised prior versions of the Plan. This Plan supersedes previous versions.

<sup>3</sup> Chapter 106 of the Laws of 2019. The Climate Act is available at <https://legislation.nysenate.gov/pdf/bills/2019/S6599>.

<sup>4</sup> 2019 Climate Leadership and Community Protection Act. <https://legislation.nysenate.gov/pdf/bills/2019/s6599>. The Act defines DACs as “communities that bear burdens of negative public health effects, environmental pollution, impacts of climate change, and possess certain socioeconomic criteria, or comprise high-concentrations of low- and moderate-income households.”

efficient and electrified homes and one million electrification-ready homes – by 2030, with at least 800,000 of the homes being LMI households.<sup>5</sup>

This Implementation Plan includes a budget of approximately \$1.1 billion in funding allocations across all of the Program Administrators from 2020-2025, with estimated lifetime electric savings of 9.3 million megawatt hours (“MWh”), and gas and other delivered fuels savings of 192 million British Thermal Units (“MMBtu”), while serving an estimated 2.3 million participants.<sup>6</sup> The Plan is consistent with directives from the New York Public Service Commission (“Commission”), including the Accelerated Efficiency Order<sup>7</sup> from December 2018 and the 2020 NE: NY Order<sup>8</sup> from January 2020, which specifies spending 20% of incremental energy efficiency funding on LMI customers with 40% of that spending allocated to affordable multifamily buildings.

The Plan reflects a consistent and accessible program framework whereby the Program Administrators jointly design, implement, maintain, and improve a single Statewide LMI Portfolio of programs. This approach supports enhanced and consistent services and offerings across the state; increased efficiencies and associated cost reductions, including in Portfolio implementation, administration, marketing, and evaluation; and coordinated efforts to continually improve and enhance the Portfolio. LMI customers, contractors, and other market actors and stakeholders benefit from increased alignment of initiatives, incentive structures, marketing, and other Portfolio elements. The Program Administrators file LMI Portfolio Annual Reports which provide information on annual performance of the Portfolio’s activities and achievements under the Portfolio framework.

The Program Administrators work to collaboratively identify, assess, and implement the steps necessary to achieve the vision and associated benefits of the Statewide LMI Portfolio for the period of the Plan, which began in 2020 and continues through 2025. These efforts are coordinated under the LMI Joint Management Committee (“JMC”)<sup>9</sup> and reflect ongoing engagement with and input from external stakeholders, including but not limited to members of the public, affordability advocates, service providers, and affordable housing agencies.

The Program Administrators acknowledge the Commission’s July 20, 2023 Order Directing Energy Efficiency and Building Electrification Proposals (“EE/BE Proposals Order”), which

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<sup>5</sup> Governor Hochul Announces Plan to Achieve 2 Million Climate-Friendly Homes by 2030:

<https://www.governor.ny.gov/news/governor-hochul-announces-plan-achieve-2-million-climate-friendly-homes-2030#:~:text=Governor%20Kathy%20Hochul%20today%20announced,reaches%20zero%20Demiissions%20by%202027>

<sup>6</sup> “Annual Participants” includes Customer Awareness, Outreach, and Engagement initiatives (see, Section 5, below) that tend to reach a large number of customers. A detailed breakout by sector is included in Appendix D.

<sup>7</sup> NE: NY Proceeding, Order Authorizing Accelerated Energy Efficiency Targets (issued December 13, 2018) (“Accelerated Efficiency Order”).

<sup>8</sup> NE: NY Proceeding, Order Authorizing Utility Energy Efficiency and Building Electrification Portfolios Through 2025 (issued January 16, 2020) (“2020 NE: NY Order”).

<sup>9</sup> The Order Approving Clean Energy Fund Modifications (“CEF Modifications Order”) issued September 9, 2021, ordered the formation of an Executive Level Council (“Executive Council”) to provide oversight and guidance to the LMI JMC, as applicable.



established important directives related to the Statewide LMI Portfolio.<sup>10</sup> While several substantial changes to the Statewide LMI Portfolio from the EE/ BE Proposals Order take full effect after the current plan period which concludes as of December 31, 2025, the Program Administrators will continue in 2024 and 2025 to address an optimal transition to the post-2025 LMI Portfolio administrative structure.<sup>11</sup> The Program Administrators will continue to work closely with New York State Department of Public Service (“DPS”) Staff to implement the directives of the EE/BE Proposals Order and any subsequent directives and Commission Orders.

## 1.2 Summary of Plan

Following this Introduction and Overview, the Plan is comprised of the following additional sections:

[Section 2. Statewide LMI Portfolio](#) describes the market, policy, and regulatory context for the Statewide LMI Portfolio, key elements of Portfolio administration including stakeholder engagement, Portfolio Objectives and Performance Metrics, and Portfolio eligibility thresholds.

[Section 3. Budgets, Benefits, and Other Impacts](#) presents the Portfolio budgets and benefits for 2020-2025, both by year and by Program Administrator, as well as Portfolio-level performance metrics by year, with additional detail on budgets, benefits, and metrics provided in the appendices.

[Section 4. Statewide LMI Portfolio Initiatives](#) describes the Portfolio initiatives by sector:

- Existing 1-4 Family Homes
- Existing Affordable Multifamily Buildings
- Affordable New Construction
- Pilots and Demonstrations
- Building Electrification
- Additional LMI Initiatives funded through NYSERDA administered Clean Energy Fund (“CEF”)<sup>12</sup>, including New York State Healthy Homes Value-Based Payment Pilot

[Section 5. Customer Awareness, Outreach & Engagement](#) describes LMI Portfolio Marketing; Community Based Outreach Education and Engagement Partnerships led by NYSERDA (the Clean Energy Hubs in particular); and Community-Based Customer Engagement and Innovative Engagement Approaches led by the Utilities (collectively or on a utility-specific basis).

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<sup>10</sup> NE: NY Proceeding and Case 14-M-0094, Order Directing Energy Efficiency and Building Electrification Proposals (“EE/ BE Proposals Order”) (Issued July 20, 2023).

<sup>11</sup> The EE/BE Proposals Order directed Program Administrators to file individual proposals on November 1, 2023, which, among other things, addressed the post-2025 LMI Portfolio. The Program Administrators each submitted proposals on November 1, 2023; for NYSERDA, Con Edison, and National Grid (for its KEDNY and KEDLI service territories), this included LMI Portfolio-specific proposals. Following a request from the New York State Department of Public Service (“DPS”) Staff, the Program Administrators provided additional requested information on these proposals on January 12, 2024.

<sup>12</sup> CEF Proceeding, Order Authorizing the Clean Energy Fund Framework (issued January 21, 2016).

[Section 6. Coordination with External Program Administrators and Other Organizations](#) describes additional coordination opportunities (beyond those among the Program Administrators) to work with programs administered by New York State agencies, local government, and community-based organizations to reduce redundancy and to increase synchronization, effectiveness, and overall impact for customers.

[Section 7. Benefit Cost Analysis](#) presents the summary results of the updated Benefit Cost Analysis (“BCA”) for the Statewide LMI Portfolio of initiatives, with additional detail provided in [Appendix E](#).

[Section 8. Evaluation, Measurement, & Verification Approach](#) describes the coordinated approach that the Program Administrators take in estimating savings and evaluating LMI initiatives and provides a summary of updated Verified Gross Savings (“VGS”) Specifications, which are filed along with this Plan.

## 2. Statewide LMI Portfolio

The Implementation Plan reflects the statewide portfolio of energy efficiency programs for LMI customers that allows the Program Administrators to address energy affordability in a holistic, coordinated manner.

The Statewide LMI Portfolio aligns LMI investments that NYSERDA makes through the Clean Energy Fund (CEF) and investments that the Utilities make under the 2020 NE: NY Order and the Accelerated Efficiency Order. Through 2025, the Program Administrators have committed approximately \$1.1 billion<sup>13</sup> in clean energy investments through the Statewide LMI Portfolio. Beyond the Portfolio, NYSERDA and the Utilities are advancing initiatives that benefit DACs through the CEF and the Utility System Energy Efficiency Plans (“SEEP”), including initiatives that contribute to the reduction of fossil-fuel combustion in facilities located in Environmental Justice (“EJ”)<sup>14</sup> areas and DACs, workforce training and development focusing on priority populations, and improving access to solar for LMI or DACs and affordable housing.<sup>15</sup>

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<sup>13</sup> \$667 million in funding from the CEF and \$424.3 million in Utility funding.

<sup>14</sup> Environmental justice is the fair treatment and meaningful involvement of all people regardless of race, color, national origin, or income, with respect to the development, implementation, and enforcement of environmental laws, regulations, and policies. <https://www.dec.ny.gov/public/333.html>

<sup>15</sup> Through the CEF, NYSERDA is investing \$118 million to provide access to workforce training and development opportunities, with a focus on priority populations including residents of LMI communities and underrepresented populations including formerly incarcerated, single parents, homeless individuals and disconnected youths. In June 2020, NYSERDA filed the 2020-2025 Operating Plan for NY-Sun, which outlines \$200 million of investments to increase access to solar for LMI households, disadvantaged and EJ communities, and affordable housing. In April 2022, the Commission approved the 10 Gigawatt Framework for Distributed Solar, which includes investments in rooftop and community solar for low-income and disadvantaged communities. Beyond workforce development and LMI programs, the utilities and NYSERDA administer programs that provide incentives to improve energy efficiency and reduce fossil fuel combustion in commercial, industrial, and institutional buildings.

## 2.1 LMI Market Segment in New York

New York State's LMI customer market is broad and diverse, with more than 3.5 million households (40% of the State's households) qualifying as LMI.<sup>16</sup> Low-income households, which comprise about 2.3 million households in the state, are defined as those with annual incomes at or below 60% of the State Median Income. Moderate-income households, which comprise about 1.2 million households in the state, are defined as those with annual incomes between 60% and 80% of the State Median Income or the Area Median Income (whichever is greater).

LMI households spend a disproportionate share of their annual income on energy bills<sup>17</sup> relative to other households in New York. In addition, LMI households often lack the time, financial resources, and information necessary to invest in or gain access to energy efficiency upgrades. LMI residents and communities also face challenges associated with quality-of-life issues, including health impacts associated with inefficient and deteriorating building stock due to lack of resources for regular maintenance and improvement.

Affordable housing providers, community organizations, and other market actors associated with affordable housing activities face similar obstacles. For instance, affordable housing owners and developers may lack the capital to invest in high-performance or clean energy improvements to their buildings. They also may not have access to resources and the technical expertise necessary to develop solutions for addressing the energy affordability issues faced by their residents.

More than 40% of New York's LMI population lives in affordable multifamily housing exceeding five or more units per building.<sup>18</sup> Those who rent apartments in these buildings often do not have the ability to make their own energy efficiency upgrades, and those who own apartments are often restricted from making improvements by complex cooperative or condominium rules. Decisions to undertake energy efficiency investments in these circumstances often reflect a "split incentive" problem. For example, in buildings where tenants pay their own energy bills, there is little incentive for building owners to undertake such investments. Likewise, tenants who are likely to move in the near term have no incentive to pursue such investments as they would not be able to reap the benefits over time.

The Statewide LMI Portfolio described in this Plan is intended to address the barriers that LMI customers can face in realizing the benefits of energy efficiency. These barriers faced by customers and challenges that the Program Administrators seek to overcome include:

- Limited LMI customer access to capital and financing;
- Limited awareness of energy efficiency programs and resources;

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<sup>16</sup> 2019 American Community Survey: <https://www.census.gov/programs-surveys/acs>

<sup>17</sup> According to 2020 Home Energy Affordability Gap data prepared by Fisher, Sheehan, and Colton and published in April 2021, energy burdens can exceed 30% of annual income for many low-income New Yorkers compared to 6% or less for higher-income New Yorkers: <http://www.homeenergyaffordabilitygap.com/>

<sup>18</sup> NYSEDA Low- to Moderate-Income Market Characterization Report: <https://www.nyserda.ny.gov/-/media/Files/Publications/PPSER/Program-Evaluation/2017ContractorReports/LMI-Market-Characterization---Full-Report.pdf>

- Split incentives for affordable housing owners to make investments that improve tenant space;
- Administrative challenges in identifying and reaching LMI customers;
- Health and safety or structural deficiencies that impede progress on energy efficiency work; and
- Limited technical and engineering assistance for building owners.

DACs, which the Climate Act defines as “communities that bear burdens of negative public health effects, environmental pollution, impacts of climate change, and possess certain socioeconomic criteria, or comprise high-concentrations of low- and moderate-income households” also face greater challenges to accessing clean energy solutions.<sup>19</sup> Through the Statewide LMI Portfolio, the Program Administrators aim to increase access to energy efficiency and other clean energy solutions through direct investment in programs that can reduce energy burden for residents and communities, increase participation in eligible programs, and expand awareness of available resources and assistance. These solutions include offering home energy retrofits, improving the energy performance and overall quality of affordable housing, and increasing energy awareness<sup>20</sup> among and engagement with residents and communities. The challenges that DACs face are complex and, in some cases, broader than can be addressed through the Statewide LMI Portfolio alone. The Program Administrators continue to coordinate with State, local, and community-based organizations to identify opportunities for improving the impact of the Portfolio in DACs.

## 2.2 Policy and Regulatory Landscape

The Statewide LMI Portfolio contributes to the advancement of the goals laid out in various New York State energy and climate policy initiatives including, the Affordability Policy,<sup>21</sup> New Efficiency: New York (“NE: NY”), the Clean Energy Fund, and the Climate Act.

The Affordability Policy, which seeks to address energy affordability for low-income households, provides direct bill relief in the form of utility bill discounts for low-income customers, totaling approximately \$200 million in FY 2023-2024. The Affordability Policy works in concert with the suite of clean energy programs discussed in this Implementation Plan to improve energy affordability for low-income New Yorkers.

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<sup>19</sup> Chapter 106 of the Laws of 2019. The Climate Act is available at <https://legislation.nysenate.gov/pdf/bills/2019/S6599>.

<sup>20</sup> For the purposes of this Plan, “energy awareness” refers to awareness of home energy consumption and options for reducing home energy burden.

<sup>21</sup> Case 14-M-0565, *Proceeding on Motion of the Commission to Examine Programs to Address Energy Affordability for Low Income Utility Customers* (“Affordability Policy Proceeding”), Order Adopting Low Income Program Modification and Directing Utility Filings, (issued May 20, 2016). In the Affordability Policy Proceeding, the Public Service Commission developed a regulatory policy framework for addressing the energy affordability needs of low-income customers and established an energy burden target of 6% for all low-income customers.

The NYSEERDA-administered CEF, instituted in 2016, seeks to improve energy affordability and access to clean energy for LMI households. In compliance with the 2020 NE: NY Order, all CEF investments in LMI households are incorporated into this Implementation Plan to provide a holistic view of all energy efficiency, building electrification, and renewable energy initiatives serving LMI households.

Signed into law in July 2019, the Climate Act outlines an ambitious climate and equity agenda for New York State, including requirements for investing resources to benefit DACs, and for the PSC to create programs to benefit the LMI customer market segment, as well as mechanisms to track the adoption of clean energy solutions for these customers and communities.<sup>22</sup> New York has made significant progress in implementing the Climate Act, including the publication of the Final Scoping Plan, which serves as an initial framework for how the State will reduce greenhouse gas emissions and achieve net-zero emissions, increase renewable energy use, and ensure all communities equitably benefit in the clean energy transition. The Program Administrators seek to align with and incorporate requirements related to the Climate Act, including directing clean energy program spending and benefits to DACs in accordance with the finalized DAC criteria, and support the recommendations in the Final Scoping Plan, as part of the implementation of the Statewide LMI Portfolio.

In addition to the energy and environmental policies that shape this Portfolio, New York State also has an ambitious agenda to advance the affordability and sustainability of housing across the state. In 2022, Governor Hochul announced the Two Million Homes Action Plan, a plan to achieve Two Million Climate-Friendly Homes – 1 million electrified, 1 million electrification-ready, and a minimum of 800,000 serving LMI households – by 2030.<sup>23</sup> In furtherance of this goal and advancing energy and housing affordability, New York’s FY2023 Executive Budget adopted Governor Hochul’s proposed \$25 billion 5-year plan for NYS Homes and Community Renewal (“HCR”) to create or preserve 100,000 units of affordable housing, including a new \$250 Million building electrification fund. In addition, in 2017, the City of New York advanced the Housing New York 2.0 plan, with goals to build or preserve 300,000 homes.<sup>24</sup> In August of 2024 the Commission directed the Department of Public Service to design and implement an energy affordability pilot program for low-income households who fully electrify their space and water heating through the EmPower+ program. This pilot program will provide approximately 1,000 EmPower+ program participants with tailored bill assistance to ensure they pay no more than six percent of their annual household income toward electricity costs.

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<sup>22</sup> Chapter 106 of the Laws of 2019. The Climate Act is available at <https://legislation.nysenate.gov/pdf/bills/2019/S6599>.

<sup>23</sup> <https://www.governor.ny.gov/news/governor-hochul-announces-plan-achieve-2-million-climate-friendly-homes-2030>

<sup>24</sup> <https://www1.nyc.gov/assets/hpd/downloads/pdfs/about/housing-new-york-2-0.pdf>

Further, in 2021, New York City passed a landmark law to phase out combustion of fossil fuels in new construction by 2027.<sup>25</sup> Affordable housing agencies have embraced a leadership role in developing and preserving affordable housing that is also highly efficient and electrified, which in turn can provide important co-benefits such as improved health outcomes and comfort of tenants and reduced operating costs for building owners.

In 2022, the federal government passed the Inflation Reduction Act (“IRA”). The IRA represents the single largest investment in climate and energy in U.S. history, directing billions of dollars towards homeowners, renters, businesses, municipalities, and nonprofit organizations to lower the cost of clean energy technologies. Over the next decade, the IRA promises to grow New York’s clean energy economy and reduce greenhouse gas emissions to meet the goals of the Climate Act.<sup>26</sup>

The IRA offers rebates, tax credits, and low-cost financing to make the switch from fossil-fueled appliances and equipment to new, clean electric models. New Yorkers can often combine these IRA benefits with State incentives and programs to maximize savings on electric vehicles, solar panels, energy efficiency upgrades, heat pumps, and more.

Since 2023, IRA tax credits have been available to all New Yorkers. New York State is in the process of rolling out IRA rebates, with initial funding available for income-eligible New Yorkers through the EmPower+ program. Additional IRA rebates, including offers for multifamily buildings and certain high-efficiency appliances, will become available later in 2024.

### 2.3 Statewide LMI Portfolio and Program Administration

The Program Administrators leverage their respective strengths in implementing the Statewide LMI Portfolio. The blending of the statewide reach and market development components of NYSEDA’s CEF with existing Utility resource acquisition and customer relationship expertise, as well as increased LMI funding, enables the Portfolio to better address the barriers and challenges to expanding the reach of energy efficiency initiatives across the LMI customer market segment holistically. [Section 4](#) of this Plan, Statewide LMI Portfolio Initiatives, provides more detail about the working relationship among the Program Administrators.

The development and calibration of the Statewide LMI Portfolio is informed through various inputs, including program performance and market insight from stakeholders, and is overseen by the LMI JMC. Stakeholder engagement is a critical element to the success of the Statewide LMI Portfolio, and the Program Administrators use multiple avenues for engaging with stakeholders to receive feedback on current programs and identify opportunities for future initiatives.

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<sup>25</sup> <https://www1.nyc.gov/office-of-the-mayor/news/852-21/mayor-de-blasio-signs-landmark-bill-ban-combustion-fossil-fuels-new-buildings>

<sup>26</sup> <https://climate.ny.gov/>

### 2.3.1 LMI Joint Management Committee

As described in the Statewide Low- to Moderate-Income Joint Management Committee Manual,<sup>27</sup> the LMI JMC provides a forum for the Program Administrators to jointly develop and coordinate new market offerings and assess and refine ongoing programmatic activity, in accordance with the Implementation Plan. The LMI JMC consists of representatives from each of the Utilities and NYSEERDA, including a lead representative from each organization who serves as the point of contact for Committee-related communications and administrative matters. The DPS Staff provides an oversight and consultative role for the JMC.

### 2.3.2 Stakeholder Engagement

The effectiveness of the Portfolio largely depends on how well the initiatives and services function for customers and communities. Residents, communities, service providers, and other stakeholders provide beneficial insight that may otherwise not be readily and universally apparent. In combination with EM&V activities and Performance Metrics results, stakeholder engagement and feedback contribute to providing the Committee with a holistic view of the Statewide LMI Portfolio. This wider view allows for improvement efforts and adjustments in alignment with market conditions. To inform the continued development and evolution of the Statewide LMI Portfolio and the ongoing operations of programs, the Program Administrators seek regular opportunities to engage with market partners and communities.

The Committee conducts two stakeholder engagement input sessions per year to review initiatives and services and Portfolio performance and discuss input with stakeholders comprised of staff from Community Based Organizations (“CBOs”), government, utilities, and other market partners. In addition, the Program Administrators conduct focused discussions with stakeholders through one-on-one and small group discussions to obtain input on proposed initiatives and services.

Details on each of the two annual stakeholder input engagement sessions, including meeting logistics, presentations, and a summary document reflecting key issues discussed, questions and answers received, and responses given during each stakeholder input engagement session are posted on the DPS Document and Matter Management website (“DMM”).<sup>28</sup> Further, materials are posted on the LMI Stakeholder Resources webpage, which was specifically designed to give stakeholders easy access to documents related to stakeholder engagement.<sup>29</sup>

At LMI JMC meetings and applicable working groups, the Program Administrators regularly share, discuss, and integrate stakeholder input. Further, the Program Administrators are regularly engaging with stakeholders through the administration of current programs; feedback

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<sup>27</sup> NE: NY Proceeding, “Statewide Low- to Moderate-Income Joint Management Committee Manual, Version 2” (Filed December 22, 2021).

<sup>28</sup> See, e.g., NE: NY Proceeding, Statewide Low- to Moderate-Income Portfolio Stakeholder Webinar August 1, 2024 - Summary Report, (filed September 3, 2024)

<sup>29</sup> See, <https://www.nyserda.ny.gov/All-Programs/Low-to-moderate-Income-Programs/LMI-Stakeholder-Resources-New-Efficiency-New-York>.



received during such engagement is raised and discussed at the LMI JMC and/or appropriate working groups. Annual Reports provide additional detail on stakeholder engagement each year.<sup>30</sup>

### 2.3.3 Data Sharing Among the Program Administrators<sup>31</sup>

The efficient sharing of data between the Utilities and NYSERDA is an important component of achieving the goals and objectives described in the Implementation Plan. Such sharing must, however, balance the improved customer experience and streamlined administration of programs, with the need for diligence in rules, processes, and systems that protect customer privacy and security consistent with Commission and Program Administrator policies, laws, and regulations. The Program Administrators developed the following approach:

- Identify the data sharing needs for the Portfolio to streamline customer access to all eligible programs and minimize administrative friction;
- Develop a comprehensive understanding of the existing data sharing framework in place;
- Determine whether any gaps exist between data needs for the Portfolio and the existing data sharing framework; and
- Identify and implement solutions to address any gaps that are identified.

The Portfolio reflects numerous instances of data sharing, including in EmPower+ and AMEEP, which are reflected in Sections 4.1 and 4.2, and which is described in prior Implementation Plans and Annual Reports. In addition, the Program Administrators have agreed upon consent language across programs, which customers sign to participate.<sup>32</sup>

### 2.3.4 Implementation Contractor Models and Procurement

The Program Administrators recognize the central function of Implementation Contractors in the Portfolio, noting that a more integrated set of initiatives between the Utilities and NYSERDA

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<sup>30</sup> See, e.g., 2023 Annual Report, Section 3.

<sup>31</sup> In prior Statewide LMI Implementation Plans, Annual Reports, and a 2020 Coordination Plan filing, the Program Administrators noted several complex coordination and administration elements that needed to be addressed in the development and implementation of the Portfolio. The Program Administrators filed a Statewide Low- to Moderate-Income Joint Management Committee Coordination Plan (“Coordination Plan”) on November 13, 2020, which detailed progress on and plans for addressing these topics; the Program Administrators provided additional updates on the topics in the 2020, 2021, 2022 Annual Reports. NE: NY Proceeding, “Statewide Low- to Moderate-Income Joint Management Committee Coordination Plan” (Filed November 13, 2020). NE: NY Proceeding, 2020 Annual Report (filed April 1, 2021), pp. 6-8; 2021 Annual Report (filed April 1, 2022), pp., 12-16. Two of the topics, marketing and EM&V, are now addressed in Sections 5 and 8 of this Plan, respectively. Topics related to implementation contractor (“Implementation Contractor”) procurement and statewide application are reflected in applicable subsections of Section 4. Statewide LMI Portfolio Initiatives, in particular Sections 4.1 Existing 1-4 Family Homes and Section 4.2 Existing Multifamily Buildings. The topics of Data Sharing Among the Program Administrators and Implementation Contractor Models and Procurement are addressed as Sections 2.3.3 and 2.3.4, respectively, of this Plan.

<sup>32</sup> NE: NY Proceeding and CEF Proceeding, “Standard Customer Consent Language,” (September 5, 2023)



provides the potential to assess the role of Implementation Contractors to achieve economies of scale and reduce overall administrative costs within the Statewide LMI Portfolio.<sup>33</sup>

Based on an assessment of alternative Implementation Contractor structures, the Program Administrators use two Implementation Contractors for AMEEP, one covering Con Edison, Central Hudson, Orange & Rockland and National Grid's KEDLI and KEDNY service territories, and one covering NFGDC, NYSEG, RG&E, and National Grid's NMPC service territory.<sup>34</sup>

For 1-4 Family Homes programs, a single Implementation Contractor model is used to deliver the LMI 1-4 Family Homes residential programs Statewide. NYSERDA administers the programs for most of the state, including municipal electric territories, where supplemental energy efficiency incentive funding is provided through the RGGI Annual Operating Plan,<sup>35</sup> with implementation support provided by a third-party Implementation Contractor. In areas of the state where electric service is not provided by one of the Utilities, close coordination is occurring between the relevant electric providers (*i.e.*, on Long Island, and between NYSERDA and National Grid for the Home Energy Affordability Team ("HEAT") Program).

### 2.3.5 Implementation Plan Revisions

In accordance with the 2020 NE: NY Order and informal DPS guidance, the Implementation Plan is jointly updated and filed annually. In addition, the Implementation Plan is refiled when substantive modifications to the Portfolio are made, such as new programs or budget shifts into or out of the LMI Portfolio. Such modifications are made based on Portfolio performance, input from stakeholders, and discussion among the LMI JMC. Additionally, the Program Administrators file a Statewide LMI Program Annual Report detailing the Portfolio's performance through the previous calendar year, any substantive findings, and planned areas for future improvement.<sup>36</sup>

## 2.4 Statewide LMI Portfolio Objectives and Performance Metrics

Reflecting a list of broad and wide-reaching objectives for the Portfolio from the Accelerated Efficiency Order,<sup>37</sup> the Program Administrators have established clear objectives for the Portfolio, which can be effectively measured and assessed by the Program Administrators, the Commission, and other stakeholders, including through the tracking of Performance Metrics, which are described below. Specifically, the Portfolio establishes the following key objectives:

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<sup>33</sup> NE: NY Proceeding and CEF Proceeding, Statewide Low- to Moderate-Income Joint Management Committee Coordination Plan (filed November 13, 2020). The Coordination Plan identified and discussed a range of possible topics and solutions, including contracting timelines, Implementation Contractor functions, cost issues, and streamlining of different Implementation Contractor models among Program Administrators.

<sup>34</sup> See, NE: NY Proceeding, Statewide Low- to Moderate-Income Portfolio 2021 Annual Report ("2021 Annual Report") (filed April 1, 2022), p. 15, which describes the assessment process the Program Administrators used in selecting this Implementation Contractor structure.

<sup>35</sup> RGGI Meeting and Planning Documents website <https://www.nyserra.ny.gov/Researchers-and-Policymakers/Regional-Greenhouse-Gas-Initiative/Useful-Documents>

<sup>36</sup> NE: NY Proceeding, "Statewide Low- to Moderate-Income Joint Management Committee Coordination Plan" (Filed November 13, 2020). NE: NY Proceeding, 2023 Annual Report (filed April 1, 2024).

<sup>37</sup> NE: NY Proceeding, Accelerated Efficiency Order, p. 53.

- Achieve savings goals within budget;
- Increase the number of customers served annually;
- Encourage customer adoption of comprehensive efficiency projects;
- Encourage new affordable housing to adopt more energy efficient profiles;
- Increase LMI customer and affordable housing owner awareness of the Portfolio's energy efficiency programs and offerings;
- Achieve high customer satisfaction;
- Improve energy affordability for LMI customers; and
- Increase administrative efficiencies.

The Program Administrators will continue to measure the success of the Statewide LMI Portfolio in meeting objectives identified above by tracking the Performance Metrics shown in [Table 1](#). Performance Metrics are foundational to assessing the Statewide LMI Portfolio's success and identifying areas for improvement. The Performance Metrics provide a roadmap for future Portfolio evaluation, guiding the investigation of and informing the basis for measuring performance. The objectives and corresponding Performance Metrics will be reviewed on a periodic basis and updated as appropriate to reflect Portfolio maturity. The list of objectives in Table 1 are not the only key objectives of this Portfolio but have been identified as those that should be tracked to report performance. The Program Administrators track and report the Performance Metrics related to savings and spending in Table 1 quarterly for the Clean Energy Dashboard ("CED")<sup>38</sup>, as well as each Annual Report. The Program Administrators survey stakeholders and customers periodically to gauge their awareness of and satisfaction with the program offerings over time. The third column in this table, "Status," addresses the current ability of the Program Administrators to assess each of the Performance Metrics.

Table 1: Portfolio Objectives and Performance Metrics

Portfolio Objective	Performance Metrics	Status
<b>Portfolio Savings &amp; Spend</b>		
Achieve Portfolio-wide savings goals within budget	MWh annual and lifetime savings achievements	Currently provided in CED and Annual Report
	MMBtu annual and lifetime savings achievements	Currently provided in CED and Annual Report
	CO2e Emission Reduction (metric tons) annual and lifetime savings achievements	Currently provided in CED and Annual Report
	Budget spent	Currently provided in CED and Annual Report
<b>Portfolio Participation</b>		

<sup>38</sup> See, <https://www.nyserda.ny.gov/About/Tracking-Progress/Clean-Energy-Dashboard/View-the-Dashboard>

Portfolio Objective	Performance Metrics	Status
Increase the number of customers served annually	Number of participants <sup>39</sup> served	Currently provided in Annual Report
Adopt comprehensive <sup>40</sup> efficiency projects	Energy savings acquired from comprehensive projects	Currently provided in Annual Report
Portfolio Customer Experience		
Increase customer Portfolio awareness	Percentage of LMI customers that learn about Portfolio initiatives from various sources ( <i>e.g.</i> , NY Energy Advisor website, Utility or NYSEDA outreach materials, contractors, etc.)	Process evaluations will assess both sources of program awareness and participant satisfaction via surveys <sup>41</sup>
Achieve high customer satisfaction	Participation satisfaction rating	
Advance energy affordability for LMI customers	Participant bill savings, annual and lifetime	Currently provided in Annual Report; Impact evaluations will assess annual and lifetime savings <sup>42</sup>
Portfolio Efficiencies		
Increase efficiencies of Portfolio investments <sup>43</sup>	Cost associated with all Portfolio investments	Currently provided in Annual Report comparing year over year spend and unit costs (\$/MMBtu); addressed in BCA assessment.

<sup>39</sup> For the purposes of this Plan, starting in 2022, “participant” is defined as dwelling units served in statewide programs. Dwelling units that receive both electric and gas measures are counted in both the electric and gas category by utility but will only be counted once at the state level. This approach is consistent with past LMI Implementation Plans, though it is noted that the 2023 LMI Annual Report reported participants in alignment with Clean Energy Dashboard scorecards, which count participants in both electric and gas categories, where applicable. The LMI JMC is working towards resolving the reporting methodology for participant counts between future Implementation Plan and Annual Report filings. Prior to 2022, the definition of participants depended on the initiative type, and may have referred to households, multifamily buildings, tenants, and/or accounts.

<sup>40</sup> NE: NY Proceeding, Accelerated Efficiency Order, p. 36. The Accelerated Efficiency Order states “Comprehensive programs that combine lower cost-effective measures with higher cost-effective measures can optimize the total reduction that can be attained through a single customer transaction. Further, comprehensive building efficiency improvements often result in the installation of measures with longer effective useful lives (EUL), resulting in savings that persist well into the future.”

<sup>41</sup> Evaluations will be posted on DMM under case number 16-02180

<sup>42</sup> Evaluations will be posted on DMM under case number 16-02180

<sup>43</sup> Such efficiencies are described in [Section 3](#), and may apply to categories including, but not limited to, administration, implementation, marketing, incentives, and EM&V.

## 2.5 Eligibility Thresholds

For the purposes of establishing categorical eligibility and creating consistency in the market where possible, the income thresholds used to determine eligibility for LMI initiatives are aligned with other state and federal energy and housing programs. The definition of “low-income” is a household income that is at or below 60% of the State Median Income and is consistent with income eligibility criteria used by the Home Energy Assistance Program (“HEAP”)<sup>44</sup> and the Weatherization Assistance Program (“WAP”). This establishes the receipt of HEAP or WAP as an income eligibility proxy rather than relying on determinations from NYSERDA and the Utilities. The definition of “moderate-income” is a household income that is below 80% of the Area Median Income or State Median Income, whichever is greater, and aligns with federal Housing and Urban Development (“HUD”) definitions for eligibility for affordable housing.

To establish categorical eligibility for affordable multifamily initiatives, affordable housing is defined as buildings that have regulatory agreements with a housing agency or in which at least 25% of the units are, or are expected to be, occupied by households earning not more than 80% of Area Median Income or State Median Income, whichever is greater.<sup>45</sup>

Where categorical eligibility cannot be established for programs, income screening may be conducted on an individual customer or building basis. Consistent with the 2020 NE: NY Order, the Utilities and NYSERDA will continue to develop necessary processes and agreements for NYSERDA to conduct income verification for participation in LMI initiatives, where necessary. In addition to applying traditional income eligibility criteria, the Program Administrators will continue to incorporate alternate methods of determining eligibility for programs, such as geographic eligibility, census-tract, demographic or other means of categorical eligibility.<sup>46</sup> This is expected to become increasingly important as the state seeks to invest more in DACs per the Climate Act, and as Program Administrators seek more community-based and streamlined ways of delivering services.

## 3. Budgets, Benefits, and Other Impacts

The Statewide LMI Portfolio consolidates the initiatives and associated budgets and benefits of the CEF and the Utilities. The 2020 NE: NY Order and Accelerated Efficiency Order combined approved a minimum of approximately \$308.3 million in statewide Utility incremental budgets for LMI gas and electric programs through 2025. As defined below, an additional \$115.9 million

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<sup>44</sup> Federal Low-Income HEAP regulations establish the maximum income level allowed at 150% of the poverty level, except where 60% of SMI is higher. New York State has adopted the higher of 60% SMI or 150% Federal Poverty Level as the maximum income level allowed. Information on HEAP to be found at: <https://otda.ny.gov/programs/heap/>.

<sup>45</sup> Buildings that do not pay into the System Benefits Charge are not eligible for services through the Statewide LMI Portfolio of initiatives. However, NYSERDA administers Regional Greenhouse Gas Initiative (RGGI) funding, which can be used in some cases to fund projects located in municipal utility territory. The Program Administrators will coordinate with PSEG-Long Island to coordinate where necessary to ensure consistency in program offerings for income-eligible customers across the state.

<sup>46</sup> Examples include customer participation in housing or social service programs.

in other utility funding will be allocated to this Portfolio. Through the CEF, NYSEDA is incorporating \$667 million into the Portfolio to fund LMI clean energy initiatives over the same time period.<sup>47, 48</sup> Combined, the Statewide LMI Portfolio have invested approximately \$1.1 billion in LMI clean energy initiatives should by the end of the current NE: NY Order period, with total annual savings benefits of 10,722,636 MMBtu and 560,757 MWh.<sup>49</sup> Table [A.4 Additional or Redirected Funds](#), in Appendix A, provides information for Program Administrators that incorporate additional funds into the Portfolio or shift funds between electric and gas over the course of the Portfolio. Initiatives funded through the Portfolio include a combination of statewide initiatives, initiatives tailored to local needs, coordinated outreach and education, and market development activities.<sup>50</sup>

The budgets and savings benefits presented below reflect material differences in some cases from the targets set forth in the 2020 Implementation Plan and the 2020 NE: NY Order.<sup>51</sup> It is recognized that the budgets and benefits (also referred to as targets) from those documents were based on historic data which predated those filings. Generally, that historic data contained more projects that were completed at lower costs, with less effort and in shorter time spans than is the case in this Portfolio, which is comprised of programs that encourage deeper and more comprehensive projects. The discrepancy in performance and projections as compared to the 2020 NE: NY Order and 2020 Plan is greatest for the 1-4 Family Programs (e.g., seen in higher run rates);<sup>52</sup> accordingly, the impact on utility savings is most pronounced for those utilities whose budget allocations lean most toward the 1-4 Family Homes sector, as opposed to multifamily. Utility gas programs similarly show a greater discrepancy in run rates compared to electric programs. In light of such dynamics, the Program Administrators remain committed to achieving cost efficiencies in the Portfolio, increasing the impact of ratepayer investments, and reaching more LMI customers with the benefits of energy efficiency.

Program Administrator detail is included prior to the Program Administrator-specific budget and benefits tables in [Appendix C](#). In summary:

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<sup>47</sup> The \$667 million in CEF funding builds on the \$255 million that was already committed in the LMI Chapter of the CEF in 2020, which outlined the investments that have been made to advance energy affordability and access to clean energy solutions through the CEF. With the filing of the 2020 Implementation Plan, NYSEDA closed out the LMI Chapter of the CEF and included all future investments in clean energy in the LMI market segment in this Implementation Plan.

<sup>48</sup> Some NYSEDA investments have longer project timelines than through 2025, such as incentives for affordable new construction. While all funding will be committed by 2025, it may require an additional 5 years for all funds to be expended. This dynamic is reflected in budget and benefit tables in this Plan.

<sup>49</sup> Includes NYSEDA indirect annual savings, which are reported as plans in this Implementation Plan.

<sup>50</sup> As part of the Portfolio, the Program Administrators fund activities intended to increase market uptake of energy efficiency solutions by providing technical assistance to building owners, builders, developers, and housing agencies, and conducting pilots and demonstrations to test and validate new technologies and approaches for delivering energy efficiency services in the LMI market segment.

<sup>51</sup> Ordered amounts include additional rate case funds and savings benefits from NFGDC and National Grid (KEDLI).

## **Benefits**

- Projected achievement of ordered electric Utility Program Administrator savings targets varies from overachievement, to alignment, to underachievement relative to 2020 NE: NY Order and the 2020 Implementation Plan.
- NYSERDA projection regarding electric benefits is aligned; NYSERDA projection regarding gas benefits is aligned.

## **Budgets:**

- The Existing 1-4 Family Homes and Existing Affordable Multifamily Buildings Initiatives represent the bulk of the Statewide LMI Portfolio budget. 33% of the total statewide Portfolio budget, including CEF investment, is allocated to Existing 1-4 Family Homes initiatives. 52% of the total Portfolio budget, including CEF investment, is allocated to Existing Affordable Multifamily initiatives.
- Generally, utilities plan to spend or nearly spend their total ordered electric and gas budgets through 2025, acknowledging shifts of funds between commodities and programs to optimize progress to achieving ordered targets.
- NYSERDA's funding is on a fuel neutral basis and aligns with the 2020 NE: NY Order and subsequent LMI Implementation Plan budgets. Some Program Administrators plan to allocate funds beyond the LMI funds authorized in the 2020 NE: NY Order, either from unspent funds from a prior year (within the NE: NY timeframe) from market rate energy efficiency programs, or from funding approved in Program Administrators' rate cases.

### **3.1 Portfolio-Level Budgets**

This section addresses the Program Administrators' plans to fund the Statewide LMI Portfolio through 2025.<sup>53, 54, 55</sup> The full breakdown of budget elements by market segment and Program Administrator is included in [Appendix C](#).

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<sup>53</sup> NYSERDA budgets are based on electric collections, and are presented in the electric budget table, however the funds are administered on a fuel neutral basis.

<sup>54</sup> Expenditures in years 2026-2030 reflect projected NYSERDA investments that have longer project timelines, such as incentives for affordable new construction, as noted above. While all funding will be committed by 2025, it may require an additional 5 years for all funds to be expended.

<sup>55</sup> Budgets and benefits presented in this Implementation Plan for 2020-2022 represent actual budget spend and achievements in those years.

Table 2: Portfolio Electric Budgets (\$000)

Program Administrator	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Central Hudson	-	-	88	98	347	443						976
Con Edison	6,373	3,740	5,643	3,785	10,104	7,424						37,069
National Grid (NMPC)	-	-	996	1,361	5,592	4,951						12,900
NYSEG	880	495	1,219	1,988	2,123	3,559						10,264
Orange & Rockland	-	-	1,155	897	1,324	746						4,122
RG&E	504	382	668	1,099	1,027	1,985						5,664
NYSERDA	63,959	87,334	105,277	64,196	57,444	103,780	71,787	67,249	28,621	15,262	2,120	667,030
<b>Total</b>	<b>71,716</b>	<b>91,950</b>	<b>115,046</b>	<b>73,425</b>	<b>77,961</b>	<b>122,888</b>	<b>71,787</b>	<b>67,249</b>	<b>28,621</b>	<b>15,262</b>	<b>2,120</b>	<b>738,026</b>

Table 3: Portfolio Natural Gas Budgets (\$000)

Program Administrator	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Central Hudson	-	-	239	294	728	862						2,123
Con Edison	5,001	14,781	24,298	36,266	81,223	37,017						198,587
NFGDC	4,563	3,906	9,390	6,549	6,919	7,051						38,379
National Grid (KEDLI)	1,559	1,410	3,922	7,194	11,274	9,742						35,101
National Grid (KEDNY)	-	-	1,579	3,373	10,175	9,269						24,396
National Grid (NMPC)	-	-	1,360	1,470	8,128	9,809						20,767
NYSEG	78	785	1,436	3,133	4,954	6,971						17,357
Orange & Rockland	-	-	2,682	656	2,671	1,192						7,201
RG&E	52	525	865	2,587	2,397	2,918						9,344
<b>Total</b>	<b>11,254</b>	<b>21,408</b>	<b>45,771</b>	<b>61,523</b>	<b>128,469</b>	<b>84,831</b>						<b>353,256</b>

### 3.2 Portfolio-Level Benefits

This section outlines the Utilities' and NYSERDA's Portfolio savings benefits from 2020-2025.<sup>56, 57, 58</sup> The savings benefits reflect actual and planned achievements based on available budgets. Timelines of projected benefits may slightly shift year to year within the broader goal of meeting the total MWh and MMBtu ordered targets by 2025. The full breakdown of benefits by market segment and Program Administrator is included in [Appendix C](#).

<sup>56</sup> Planned and historical achievement throughout this Implementation Plan is reported in accordance with October 2024 Utility System Energy Efficiency Plans and NYSERDA's November 2024 Compiled Investment Plan unless otherwise noted.

<sup>57</sup> NYSERDA indirect savings are reported as plans throughout this Implementation Plan.

<sup>58</sup> While NYSERDA does not administer natural gas budgets, NYSERDA does project MMBtu savings due to the fuel neutral nature of the CEF funds. MMBtu savings from fuels other than natural gas are presented below in Table 5.1.

Table 4: Portfolio Electric Targets (Annual MWh)

Program Administrator	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Central Hudson	-	-	655	188	97	456						1,395
Con Edison	39,549	13,232	13,652	25,685	19,493	7,000						118,611
National Grid (NMPC)	-	-	7,985	4,019	10,783	9,323						32,110
NYSEG	1,436	399	7,911	10,476	3,605	8,486						32,313
Orange & Rockland	-	-	1,462	1,240	497	566						3,765
RG&E	976	428	4,057	4,248	2,262	5,243						17,214
NYSERDA (direct)	7,258	16,284	20,282	11,702	7,038	15,329	20,098	29,541	20,671	12,318	3,929	164,449
NYSERDA (indirect)	96	121,917	2,481	4,644	5,573	6,184	8,538	7,648	7,991	6,668	19,159	190,900
<b>Total</b>	<b>49,315</b>	<b>152,259</b>	<b>58,485</b>	<b>62,201</b>	<b>49,349</b>	<b>52,587</b>	<b>28,636</b>	<b>37,189</b>	<b>28,662</b>	<b>18,986</b>	<b>23,088</b>	<b>560,757</b>

Table 5: Portfolio Natural Gas Targets (Annual MMBtu)

Program Administrator	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Central Hudson	-	-	642	529	1,391	6,499						9,061
Con Edison	97,558	203,034	310,503	334,446	345,286	210,892						1,501,720
NFGDC	31,411	21,968	47,420	25,395	59,053	64,393						249,640
National Grid (KEDLI)	3,549	7,749	20,233	21,636	37,233	36,537						126,936
National Grid (KEDNY)	-	-	7,080	31,798	61,812	128,409						229,099
National Grid (NMPC)	-	-	2,924	6,901	36,045	50,878						96,748
NYSEG	888	3,612	9,212	50,924	25,287	114,217						204,140
Orange & Rockland	-	-	2,688	4,250	4,815	4,400						16,153
RG&E	969	2,143	6,559	37,370	13,190	84,354						144,585
NYSERDA (direct)	142,740	222,441	237,392	216,341	87,441	402,912	275,506	796,709	516,760	292,065	30,179	3,220,485
NYSERDA (indirect)	2,560	1,041,234	47,016	128,441	167,095	192,285	243,539	218,341	220,148	212,126	533,559	3,006,343
<b>Total</b>	<b>279,674</b>	<b>1,502,181</b>	<b>691,669</b>	<b>858,031</b>	<b>838,647</b>	<b>1,295,777</b>	<b>519,045</b>	<b>1,015,050</b>	<b>736,908</b>	<b>504,191</b>	<b>563,738</b>	<b>8,804,910</b>

Table 5.1: Portfolio Other Fuels Targets (Annual MMBtu)

Program Administrator	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
NYSERDA (direct)	55,009	76,133	110,021	29,502	10,812	65,559	167,346	239,135	140,964	71,436	536	966,452
NYSERDA (indirect)	640	-	10,051	37,092	46,756	53,256	108,017	123,452	124,146	183,548	264,317	951,274
<b>Total</b>	<b>55,649</b>	<b>76,133</b>	<b>120,071</b>	<b>66,594</b>	<b>57,568</b>	<b>118,815</b>	<b>275,363</b>	<b>362,587</b>	<b>265,110</b>	<b>254,984</b>	<b>264,853</b>	<b>1,917,726</b>



### 3.3 Portfolio-Level Impacts

Table 6 provides a collective view on Portfolio-level metrics that are quantified and reported quarterly and can be viewed on the Clean Energy Dashboard. The Portfolio-level performance metrics are actual and planned achievements based on annual budgets and benefits.<sup>59</sup> A breakdown of performance metrics by sector is included in [Appendix D](#).<sup>60, 61, 62,</sup>

Table 6: Portfolio-Level Performance Metrics

Performance Metric	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Direct Annual MMBtu Savings	332,123	537,080	754,673	759,092	682,365	1,169,051	442,852	1,035,844	657,724	363,501	30,715	6,765,019
Direct Lifetime MMBtu Savings	6,997,932	11,906,597	16,190,429	14,247,641	12,840,572	19,298,168	7,595,135	16,545,165	10,922,989	6,123,938	767,875	123,436,441
Indirect Annual MMBtu Savings	3,200	1,041,234	57,067	165,533	213,850	245,541	351,556	341,792	344,295	395,675	797,876	3,957,617
Indirect Lifetime MMBtu Savings	64,000	24,796,455	943,493	2,124,788	2,849,543	3,311,403	4,955,133	4,808,684	5,011,857	5,616,918	13,750,071	68,232,342
Direct Annual MWh Savings	49,219	30,342	56,004	57,557	43,776	46,403	20,098	29,541	20,671	12,318	3,929	369,857
Direct Lifetime MWh Savings	357,130	386,933	751,888	650,841	563,288	767,007	422,220	588,615	473,345	296,630	98,225	5,356,122
Indirect Annual MWh Savings	96	121,917	2,481	4,644	5,573	6,184	8,538	7,648	7,991	6,668	19,159	190,900
Indirect Lifetime MWh Savings	1,344	2,903,390	52,740	76,229	90,157	99,055	127,233	113,886	117,815	99,184	272,706	3,953,737
Leveraged Funds (\$000)	41,056	71,594	101,110	117,787	84,575	100,937	136,385	80,965	51,920	40,855	6,500	833,684
Annual Participants	520,353	97,865	362,808	515,773	441,658	294,234	8,282	7,275	6,582	3,854	1,464	2,260,148

<sup>59</sup> MMBtu savings include NYSEDA savings from fuels other than electric and gas.

<sup>60</sup> Leveraged funds are defined as the direct private investment from incentives and service initiatives which includes co-funding of pilots or projects at specific locations, including hard costs for efficiency/renewable/distributed generation, hard costs for metering and monitoring equipment like EMS/BMS, and soft costs of systems that occur during the time frame of program administrator engagement on the pilot or project.

<sup>61</sup> “Annual Participants” includes Customer Awareness, Outreach, and Engagement initiatives (see, [Section 5](#), below) that tend to reach a large number of customers. A detailed breakout by sector is included in [Appendix D](#).

<sup>62</sup> The definition of “participant” was standardized to “dwelling unit” for statewide programs starting in 2022.

### 3.4 Budgets for Affordable Multifamily Buildings

The Accelerated Efficiency Order directed that at a minimum, 40% of the collective incremental LMI funding be committed to serving affordable multifamily buildings.<sup>63</sup> As outlined in this plan, 84% of incremental energy efficiency budgets and 52% of total Portfolio budgets have been allocated to the affordable multifamily market segment. Budget flexibility across the Portfolio will need to be maintained to cumulatively meet the 40% threshold. [Appendix A](#) outlines the investments by sector and the percentage of incremental funding and of all funding that is planned to be spent on affordable multifamily initiatives.

## 4. Statewide LMI Portfolio Initiatives

The following sections provide an overview of the initiatives and investments that the Program Administrators are undertaking to address the barriers to adoption and increase access to energy efficiency solutions across the LMI market segment.<sup>64</sup> The Portfolio includes initiatives serving existing 1-4 family homes, existing affordable multifamily buildings, affordable new construction, building electrification, as well as funding for customer engagement and pilots with new approaches for adoption of energy efficiency for LMI residents and communities.

### 4.1 Existing 1-4 Family Homes

The LMI Portfolio includes programs that offer energy efficiency upgrades to LMI customers residing in 1-4 family homes, such as EmPower+, KEDLI HEAT, and PSEG Long Island's Residential Energy Affordability Partnership ("REAP") Program. These programs, described below, collaborate to provide statewide coverage.

#### **EmPower+**

The EmPower+ program is administered statewide by NYSEERDA in close coordination with PSEG-LI and the WAP, HEAP, and local housing programs to optimize the deployment of clean energy investments in the program from multiple funding streams including CEF, NE: NY, RGGI, HEAP, State and Federal sources. Eligible improvements include no-cost comprehensive home energy assessment and direct install improvements and funding towards the cost of energy efficiency improvements including air sealing, insulation, heat pumps, heat pump water heaters, and electrical service and wiring upgrades. Low- and moderate- income customers can access EmPower+ through a single application available both online and in printable form.

- Low-income households are eligible for no-cost energy efficiency improvements up to \$10,000 per project

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<sup>63</sup> NE: NY Proceeding, Accelerated Efficiency Order, p. 55.

<sup>64</sup> The annual budgets, benefits and performance metrics for initiatives described in Section 4 are included in Appendices C and D.

- Moderate-income households are eligible for no-cost energy efficiency improvements up to \$5,000 per project. Moderate-income households may also be eligible for low-cost financing of energy upgrades through the Green Jobs – Green New York (“GJGNY”) Program.

Links to the EmPower+ program pages can be found on the NY Energy Advisor website or accessed directly by visiting NYSERDA’s website.<sup>65</sup>

As of May 2024, NYSERDA launched the initial phase of 2022 IRA funding through EmPower+, braiding existing funding resources and maximizing the impact of ratepayer dollars. Customers may access IRA Home Electrification and Appliance Rebates (“HEAR”) funding in addition to the existing EmPower+ incentive offer. Income qualifying residential households can access up to 100% of the total eligible project cost, with IRA funds enabling additional rebates per dwelling unit of up to \$14,000, for the additional measures that meet program guidelines.<sup>66</sup> The Appliance Upgrade Program will be launched in Q4 2024 and other IRA Home Energy Rebate funded programs will become available in the market in early 2025. NYSERDA will provide an update once the full IRA rules are finalized. In August 2024 the Commission directed DPS to develop and implement the Energy Affordability Guarantee. The Energy Affordability Guarantee is a pilot program that will be administered by DPS and will assure that homeowners who electrify their homes via the EmPower+ program will spend no more than 6% of their income on utility bills. DPS will coordinate with NYSERDA on outreach and energy monitoring of participating households.

Through 2025, the Joint Utilities will continue to prioritize the enrollment of low-income households with high energy consumption into the EmPower+ program to help reduce energy use and deliver long-term energy burden relief. The Utilities are working closely with NYSERDA to improve the handling of referrals of customers to the EmPower+ program to increase customer participation and lower acquisition costs. To support awareness of and participation in EmPower+, the Utilities, in coordination with NYSERDA, continue to pursue innovative outreach efforts, implemented consistently across Utilities or individually by utility, and complemented by sharing lessons learned and best practices (see Section 5.3 for additional detail).

### **National Grid KEDLI HEAT**

National Grid administers the EmPower Replacement Program in their Long Island territory, marketed under the brand name “Home Energy Affordability Team” (HEAT) program. It is

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<sup>65</sup> <https://energyadvisor.ny.gov/>

<sup>66</sup> Additional measures can be found on NYSERDA’s website. <https://www.nyserdera.ny.gov/All-Programs/EmPower-New-York-Program>. The current list includes heat pumps for heating, heat pump water heaters, insulation, air sealing, ventilation, electrical panel upgrades, electrical wiring upgrades.

designed to closely align with the EmPower+ program. The HEAT program provides gas energy efficiency and health, safety and resiliency measures to customers.

In 2022, the HEAT program expanded program eligibility to moderate-income customers and is testing a tiered incentive structure design with an ultimate goal of providing learning and insights to the EmPower+ program and informing a potential redesign of its moderate-income offering. The tiered moderate-income incentive offering is a key program component undergoing analysis in HEAT's active program process and impact evaluation. This tiered incentive offering will continue through 2025 when the program closes.

The KEDLI HEAT program will phase out of the market at the end of Q4 2025 and NYSERDA will then expand EmPower+ to serve KEDLI gas customers starting in 2026.

### **PSEG Long Island**

PSEG Long Island maintains their own program offerings, which EmPower+ and KEDLI HEAT encourage customers to coordinate with PSEG LMI programs, including the REAP Program.<sup>67</sup>

#### **Objectives:**

- Reduce energy consumption and provide more sustainable energy burden relief for income-eligible households through in-home energy education and energy efficiency improvements
- Identify and address energy-related health and safety issues in homes
- Expand the impact and reach of energy efficiency investments through program coordination
- Engage and educate LMI customers on available programs and improve access to the benefits of clean energy
- Coordination to improve the referral of low-income households with high energy consumption to reduce energy burden and improve customer conversion rate
- Continue shifting toward decarbonization, in alignment with the Climate Act, through a stepwise approach to building electrification and phase-out out of fossil fuel use for home heating and hot water, starting with those use cases where electrification will provide both decarbonization and affordability benefits for the customer
- Improve coordination with other programs (e.g., HEAP and WAP)

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<sup>67</sup> Additional information can be found here:

<https://www.psegliny.com/en/myaccount/customersupport/financialassistance/REAP>

## Technical Details

Market Segment Addressed	<p>Low- and Moderate- income homeowners and renters in 1-4 family homes who meet income eligibility thresholds.</p> <p>In instances where a tenant in a multifamily building is referred for program services, the tenant will be eligible for electrical reduction measures. The building owner will also be encouraged to conduct a more comprehensive upgrade of the building.</p>
Delivery Method	<p>Low-income households may be directly referred into EmPower+ or HEAT by Utilities, community-based organizations, human service providers, and local government. Outreach for LMI households will be conducted through statewide and local marketing efforts, the NY Energy Advisor website’s marketing campaign, community-based partners, and participating contractors.</p> <p><b>EmPower+</b> EmPower+ is delivered through a network of approximately 200 weatherization and home performance contractors across New York State. Where possible, low-income projects will be coordinated with WAP by participating contractors that are also WAP subgrantees.</p> <p><b>KEDLI HEAT</b> KEDLI HEAT is delivered through several home performance contractor partners.</p>
Eligible Measures	<ul style="list-style-type: none"> <li>• Comprehensive home audit</li> <li>• In-home energy education</li> <li>• Building shell improvements (<i>i.e.</i>, insulation, blower-door assisted air sealing, weather stripping)</li> <li>• Electric load reduction (<i>e.g.</i>, refrigerator, freezer, high-efficiency lighting)</li> <li>• Heating, Ventilation, and Air Conditioning (“HVAC”) and mechanical system repairs, tune-ups and replacements.</li> <li>• Domestic Hot Water (“DHW”) improvements and replacements</li> <li>• Controls</li> <li>• Minor health and safety improvements (<i>i.e.</i>, gas leak repairs, smoke and carbon monoxide (“CO”) detectors, combustion safety, venting)</li> <li>• Low-flow water devices</li> </ul> <p><i>The HEAT program does not provide any electric saving measures as it is a gas only program but coordinates closely with PSEG-LI’s LMI program.</i></p>

Incentive Structure	<p><b>EmPower+</b><sup>68</sup></p> <ul style="list-style-type: none"> <li>Low-income households are eligible for no-cost energy efficiency improvements up to \$10,000 per project.</li> <li>Moderate-income households are eligible for no-cost energy efficiency improvements up to \$5,000 per project. Moderate-income households may also be eligible for low-cost financing of energy upgrades through the Green Jobs – Green New York (GJGNY) Program.</li> </ul> <p>The Program Administrators, in consultation with stakeholders, customers, and contractors, have been asked to consider a more graduated incentives scale for the EmPower+ program. NYSERDA’s implementation of the IRA Home Energy Rebate programs will test the viability and cost associated with expanded LMI income eligibility thresholds LMI customers may be eligible for incentives according to a graduated incentive scale, based on household income, with modifications to project cost caps.</p> <p><b>KEDLI HEAT</b></p> <p>The HEAT program pays 100% subsidy for all measures. If a project scope exceeds \$15,000 it will be reviewed for approval on a case-by-case basis by the National Grid team.</p> <p>KEDLI HEAT offers all moderate-income customers a home energy assessment and direct install energy efficiency and health and safety measures at no cost, with a 75% subsidy for customers within 61-70% AMI, a 50% subsidy for customers within 71-80% AMI, and a 25% subsidy for customers within 81-99% AMI for project scopes up to \$10,000.</p>
Key Partners	<ul style="list-style-type: none"> <li>NYS Office of Temporary and Disability Assistance – coordinate outreach and funding to HEAP recipients to reduce utility bills</li> <li>NYS HCR - Combined project with WAP subgrantees and coordinate building electrification strategies for 1-4 family homes.</li> <li>Departments of Social Services- perform outreach and application intake</li> <li>Community-based organizations- Coordinate outreach, disaster response, program design</li> <li>NYS Office for the Aging</li> </ul>
Additional Funding	<p>For EmPower+, in addition to CEF and NE: NY funds, NYSERDA also incorporates funding from RGGI, HEAP, NY State, as well as federal funding, where available, to increase the number of households served.</p> <p>National Grid (KEDLI)’s most recent KEDNY/KEDLI rate case approved \$2.5M annually for 2024 and 2025 to support the implementation of the KEDLI HEAT program.<sup>69</sup></p>

<sup>68</sup> Additional information can be found on NYSERDA’s website: <https://www.nyserra.ny.gov/All-Programs/EmPower-New-York-Program>

<sup>69</sup> Case 23-G-0226, Proceeding on Motion of the Commission as the Rates, Charges, Rules, and Regulations of KeySpan Gas East Corporation d/b/a National Grid Gas, Order Approving Terms of Joint Proposal and Establishing Gas Rate Plans, with Minor Modification and Corrections (“KEDNY/KEDLI rate case”) (filed August 15, 2024) p.136

GJGNY	No-cost energy audits and low-interest financing are made available under the provisions of the Green Jobs – Green NY Act of 2009. The Program Administrators will coordinate the availability of these services with program incentives to provide customers with the ability to enhance energy upgrades available through the program.
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### *Implementation Milestones (2024-2025)*<sup>70</sup>

Year	Milestone	Status
2024	<ul style="list-style-type: none"> <li>Continue to optimize program design to serve more homes and encourage more contractors to offer efficiency and electrification services through the program</li> <li>Increase contractor base and expand offerings to meet increased climate goals</li> <li>Continue to increase awareness, community outreach and education through coordination between the Clean Energy Hubs and utility outreach programs</li> <li>Continue to increase DAC access to EmPower+ by coordinating with regional Clean Energy Hubs on targeted outreach to DACs</li> </ul>	In Progress
2024	<ul style="list-style-type: none"> <li>Pursue opportunities to obtain and incorporate funding from the Inflation Reduction Act into LMI programs</li> <li>Discuss ways to enhance or add measures to the existing EmPower+ offerings, particularly for gas savings</li> </ul>	Complete
2025	<ul style="list-style-type: none"> <li>Continue to integrate funding from the IRA to increase adoption of building electrification</li> <li>Prepare for the expansion of EmPower+ in NYC/Long Island area</li> <li>Integrate a dynamic customer program interface to aid in outreach to LMI homes</li> <li>NYSERDA and National Grid to file and execute on a transition plan for KEDLI HEAT projects as KEDLI HEAT closes at the end of 2025 and EmPower+ begins serving KEDLI gas customers<sup>71</sup></li> </ul>	In Progress

<sup>70</sup> This Implementation Plan includes Appendix F, which provides additional detail regarding the milestones provided in this Plan and the Implementation Plans filed in 2020 and intervening years. Appendix F provides additional information on the status of all milestones, as well as information on the changes and revisions to milestones since the 2020 Plan.

<sup>71</sup> The KEDNY/KEDLI rate case directs National Grid to collaborate with NYSERDA and DPS Staff to develop and file with the Commission a transition plan addressing customer outreach to inform affected customers of the transfer of responsibility for programs equivalent to the HEAT program to NYSERDA, planned periods reporting, processes to limit or avoid gaps in program offerings and a timeframe for completing HEAT projects beyond 2025, if applicable (*KEDNY/KEDLI rate case*, p. 136)

## 4.2 Existing Affordable Multifamily Buildings

Affordable multifamily housing is a key component of the Statewide LMI Portfolio, as a large proportion of LMI customers in New York State live in multifamily buildings. Improving the performance and sustainability of affordable multifamily housing will benefit DACs, as required by the Climate Act. As directed in the 2020 NE: NY Order, at least 40% of the portfolio's incremental energy efficiency funds must be directed to affordable multifamily initiatives through 2025.

The Program Administrators manage a set of initiatives to improve the energy efficiency of existing affordable multifamily buildings through both measure-specific and comprehensive upgrades. These efforts, combined with technical assistance, are designed to address the unique challenges and adoption barriers faced by existing affordable multifamily buildings. The Utilities, NYSERDA, and affordable housing agencies collaborated to conceive of and launch these initiatives with an eye towards leveraging existing programs. For example, NYSERDA leveraged the FlexTech program to provide technical assistance for AMEEP and provided additional funds and technical assistance for NYC HPD and NYS HCR preservation programs.

The Program Administrators oversee and implement each of the initiatives in this section. Programs are complementary to one another to furnish services for existing affordable multifamily buildings in a holistic manner. To promote comprehensive, whole-building energy upgrades, it is essential that the Program Administrators implement programs to support buildings that undertake multiple upgrades with the necessary tools and resources to understand and apply to the initiative that best suits their needs. This requires close coordination among the Program Administrators.

### 4.2.1 Affordable Multifamily Energy Efficiency Program

Launched in 2021, the Affordable Multifamily Energy Efficiency Program ("AMEEP") is a Statewide program providing a streamlined customer experience such that existing affordable multifamily building owners, developers, and their representatives have access to financial incentives to install energy efficiency upgrades. A key focus of AMEEP is to encourage comprehensive, whole-building energy retrofits to help participants achieve deeper savings and leverage opportunities to reduce administrative costs. The Utilities use the same customer application and maintain the same requirements and application for the participating contractor network. Buildings that fall in overlapping utility service territories submit one application, work with one utility Implementation Contractor as their main point of contact during their customer journey, and a single party performs inspections. Streamlining administration of the program



promotes cost efficiency. Links to AMEEP program pages can be found on the NY Energy Advisor website,<sup>72</sup> and the AMEEP application can be found on the Statewide AMEEP documents page.<sup>73</sup>

In addition to coordination among themselves, the Utilities coordinate with NYSERDA to connect interested AMEEP participants with technical assistance. Customers may perform a whole-building energy retrofit through AMEEP’s “Comprehensive Pathway.” Alternatively, customers may choose to perform single measure upgrades through AMEEP’s “Non-Comprehensive Pathway.” The AMEEP incentive structure is described in more detail in the Technical Details table below.

While the launch of AMEEP reflects full implementation of the statewide framework in service to the existing affordable multifamily sector, the Program Administrators continue to enhance elements of the program. For example, AMEEP and NYS Clean Heat will continue to coordinate to enable complementary incentives between the programs. Further, the Program Administrators continue to refine AMEEP based on sustained operational experience and stakeholder feedback. This includes exploring opportunities to leverage the existing AMEEP program structure to incorporate electrification incentives while containing costs for both residents and building owners. To this end, the Program Administrators will continue to work with external agencies, particularly affordable housing agencies serving existing affordable multifamily buildings.

#### **Objectives:**

- Address cost barriers experienced by owners of affordable multifamily properties
- Integrate energy efficiency into the regular investment and financing cycle of affordable multifamily properties where practicable
- Improve awareness and access to energy efficient solutions for tenants and building owners of affordable housing
- Provide a simplified experience for owners of affordable multifamily properties that are navigating multiple ratepayer-supported programs
- Deliver benefits to tenants, while improving the overall efficiency of the building
- Address the barrier of split incentives between owner and tenant
- Build capacity among housing agencies to incorporate energy efficiency into affordable multifamily buildings

#### ***Technical Details***

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<sup>72</sup> <https://energyadvisor.ny.gov/>

<sup>73</sup> <https://www.nyseda.ny.gov/All-Programs/Low-to-moderate-Income-Programs/LMI-Stakeholder-Resources-New-Efficiency-New-York/NYS-Affordable-Multifamily-Energy-Efficiency-Program>

Market Segment Addressed	Affordable multifamily buildings, tenants living in affordable multifamily buildings, affordable multifamily building owners, housing agencies, service providers, participating contractors, and other parties working with affordable multifamily buildings and building owners.
Delivery Method	The Utilities are the AMEEP Administrators, with NYSEERDA providing energy audits and market development elements. Energy audits are completed by NYSEERDA-approved energy providers in the FlexTech Consultant network and Multifamily Building Solutions Network and are available statewide. Two Implementation Contractors administer AMEEP, one for upstate National Grid, NFGDC, and NYSEG and RG&E, and one for Central Hudson, Con Edison, downstate National Grid (KEDLI and KEDNY), and Orange & Rockland. Participating Contractors complete installations of eligible measures. Utilities coordinate in overlapping utility service territories, so that customers work with only one implementation contractor in executing projects. The Program Administrators continue to examine the current state of implementation across the state to identify areas for improvement to reduce administrative inefficiencies, increase enrollment, and promote comprehensive upgrades.
Eligible Measures	<p>Measures include but are not limited to:</p> <ul style="list-style-type: none"> <li>• Lighting</li> <li>• Building envelope (above roof/cavity insulation, wall insulation, window replacements, etc.)</li> <li>• HVAC</li> <li>• Elevator modernization</li> <li>• Variable frequency drive</li> <li>• Blower fan</li> <li>• Circulator pump</li> <li>• Energy management systems</li> <li>• Boiler</li> <li>• Pipe insulation</li> <li>• Water and space heating</li> <li>• Steam traps</li> <li>• Boiler clean and tune</li> <li>• Light emitting diode (“LED”) lighting measures</li> <li>• Faucet aerator</li> <li>• Showerhead</li> </ul>
Incentive Structure	<p>AMEEP is designed to maximize energy savings and lower costs to tenants and owners of affordable multifamily buildings by encouraging comprehensive building upgrades while providing project flexibility. AMEEP includes two program pathways: (1) a “Comprehensive Pathway,” which encourages whole-building energy retrofits; and (2) a “Non-Comprehensive Pathway” for customers who are interested in smaller, measure-level upgrades.</p> <p>Incentives for all Comprehensive Pathway projects are calculated using a “points” system, which allocates points to energy efficiency measures based on measure savings and policy objectives and establishes points-achievement tiers that result in increased incentive rates. A minimum of 100 points needs to be met for a project to</p>

	<p>be classified as a Comprehensive project; a project is designated as Tier 1 – with the corresponding incentive level – if it achieves between 100 and 149 points. If a project reaches 150 or more points, it is categorized as a Tier 2 project and is eligible to receive a greater incentive. Comprehensive incentives are awarded on a dollar per dwelling unit basis.</p> <p>Customers opting for the Non-Comprehensive Pathway are able to perform measure-level energy efficiency upgrades. They may select to complete prescriptive and custom measures and can participate in the in-unit direct install program, without undergoing an energy audit. Incentives in this pathway are awarded on a dollar per equipment or dollar per savings basis.</p>
Key Partners	<p>NYSERDA and Con Edison have worked with NYS HCR and NYC HPD to offer complementary strategies to the market. This coordination will continue.</p> <p>Con Edison maintains consistent engagement with the NYC Mayor’s Office of Climate and Environmental Justice (specifically, the NYC Accelerator staff) to coordinate key energy efficiency topics and current program delivery methods.</p> <p>The Program Administrators will continue to work directly with housing agencies to incorporate funding into preservation projects to offset incremental costs associated with higher performance.</p> <p>Con Edison is working with their local Public Housing Authorities (<i>i.e.</i>, New York City Housing Authority (“NYCHA”), Westchester County Housing Authority (“WCHA”)) that are not covered under the System Benefit Charge (“SBC”) to provide incentives for gas energy efficiency programs.</p> <p>The Program Administrators engage regularly with AMEEP participating contractors and other stakeholders via quarterly Participating Contractor and Industry Partner (“PC&amp;IP”) webinars. The webinar series is designed for the Program Administrators to present upcoming changes to the AMEEP Program Manual and for participating contractors and industry partners to share feedback or ask questions related to the program. Additionally, the Program Administrators hold AMEEP Roundtable Discussions to solicit feedback from key stakeholders regarding AMEEP design and operations.</p>

### ***Implementation Milestones (2024-2025)***

Year	Milestone	Status
2024	<ul style="list-style-type: none"><li>Review program objectives and operations to enable alignment with potential policy changes scheduled to take place in 2022 and 2023 (e.g., NE: NY Interim Review, Climate Act definition of providing benefits to DACs)</li></ul>	In Progress
2025	<ul style="list-style-type: none"><li>Upstate utilities will collaborate with NYSERDA to transition program implementation for affordable multifamily properties. This effort will entail developing a timeline for this transition, a working group to support development of NYSERDA's new offering, and a plan to communicate these changes to the upstate affordable multifamily market.</li><li>Con Edison, Downstate National Grid, and NYSERDA will collaborate to continue and enhance implementation of incentive programs serving the downstate affordable multifamily market. This effort will, at a minimum, entails developing a plan emphasizing program efficiency and market education.</li></ul>	In Progress

#### **4.2.2 Multi-Year Affordable Housing Partnerships**

In 2021, NYSERDA announced the creation of multi-year partnerships with NYS HCR and NYC HPD to integrate decarbonization technical assistance support and incentives directly into regulated affordable housing finance processes, while supporting the development of more aggressive sustainability guidelines, new energy savings underwriting guidelines, and training among housing agency staff to position the agencies as leaders in making efficient, electrified housing their standard practice.

As part of this effort, NYSERDA and NYS HCR announced a transformative partnership called the Clean Energy Initiative ("CEI"), providing CEF funding to support state-of-the-art all-electric affordable homes and streamline access to technical assistance and electrification funding by integrating these resources directly into NYS HCR's affordable housing finance applications. CEI creates a one-stop process for developers to access technical assistance, direct integration of efficiency and electrification funding, and affordable financing, serving both affordable housing new construction and preservation. Since 2021, NYSERDA has allocated \$90.5M to NYS HCR to disperse to affordable housing finance applicants that implement efficient, all-electric new construction and retrofits. Ultimately, NYSERDA will provide \$100M in funding through 2025 to support NYS HCR in this effort ahead of proposed code changes and mandates.

CEI incentivizes installation of heat pumps for space conditioning and/or domestic hot water production, along with envelope and ventilation improvements to bring those building features beyond New York State Energy Construction Code requirements and towards passive-house level performance.

In a similar effort, NYSERDA partnered with NYC HPD to create the Retrofit Electrification Pilot, which provides \$24M to support space heating and cooling and/or DHW electrification for existing multifamily building rehabilitation projects in NYC HPD's preservation programs, which will bring the comfort and health benefits of electrification to roughly 1,200 LMI households. In August 2024, NYSERDA and HPD announced an expansion of their partnership under the Resilient and Equitable Decarbonization initiative for Existing Buildings ("REDi: EB"). REDi: EB builds upon the success of the Pilot and provides an additional \$15M to incentivize heat pump electrification and \$1.5M for technical assistance and project monitoring. As with CEI, the Pilot and REDi: EB also includes a dedicated Technical Assistance Provider to promote and enable electrification and build capacity among HPD staff and owner & developer teams for implementing decarbonization scopes. The Pilot incentivizes installation of heat pumps for space conditioning and/or domestic hot water production, as well as weatherization measures to enhance the performance of these systems. Weatherization items include enhanced windows, wall and roof insulation, pipe insulation, energy recover ventilation, and air sealing.

In Q3 of 2023, NYSERDA and HPD expanded its partnership to include the Future Housing Initiative ("FHI"), an incentive program for HPD new construction projects. FHI incentivizes projects to achieve passive house performance; specifically, projects are required to install heat pumps for space conditioning and domestic hot water production and envelope and ventilation enhancements to achieve passive house certification. FHI held its first funding round in September 2023 and the second in September 2024, under which \$12.5M in incentives were awarded to HPD new construction projects seeking Passive House performance and certification.

NYSERDA's partnerships with HPD and HCR demonstrate scalable models for integrating efficiency and electrification technical assistance and incentives into affordable housing refinancing by giving owners direct access to decarbonization resources and funding as part of their refinancing process.

NYSERDA has also joined forces with the NYCHA – the largest public housing authority in the country and the largest landlord in New York City – and NYPA to create the Clean Heat for All ("CH4A") Challenge, a heating and cooling industry competition to create a packaged, cold climate window heat pump ("PWHP") that can be mounted in a window opening and provide comfortable efficient heating and cooling to NYCHA residents on a room-by-room basis. The

partnership leverages RGGI funding and technical assistance from NYSERDA, NYPA's procurement vehicle and project management, and NYCHA's portfolio size and funding commitment to invest \$70M in a proven solution to advance their electrification agenda. Midea America and Gradient Comfort were awarded purchase orders for 20,000 and 10,000 PWHPs, respectively, pending the successful demonstration of their PWHPs over a full heating season. For that demonstration, NYCHA, NYSERDA, and NYPA are currently monitoring the performance of 72 PWHPs (comprised of 36 PWHPs from each of the two manufacturers) in NYCHA's Woodside Houses in Queens, NY over the 2023/2024 heating season and into the summer months.

To achieve full implementation in its partnerships with the housing agencies, NYSERDA will continue to expand its direct funding partnerships with state and local housing agencies to serve more units with efficiency and electrification and build capacity among housing agencies and affordable housing development community to build or retrofit all-electric efficient buildings at low or no incremental cost; enhance underwriting practices to capture the value of highly efficient, electrified buildings; to reach both new construction and preservation pipelines, and support development of sustainability guidelines that advance the affordability and sustainability goals of Governor Hochul's 5-year Affordable Housing Plan, and deliver on the State's climate goals by requiring high-performance all-electric retrofits by 2027.<sup>74</sup>

**Objectives:**

- Address cost barriers experienced by owners of affordable multifamily properties
- Integrate energy efficiency into the regular investment and financing cycle of affordable multifamily properties
- Improve awareness and access to energy efficient solutions for tenants and building owners of affordable housing
- Deliver benefits to tenants, while improving the overall efficiency of the building
- Address the barrier of split incentives between owner and tenant
- Build capacity among housing agencies to incorporate energy efficiency into affordable multifamily buildings

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<sup>74</sup> <https://hcr.ny.gov/sustainability-guidelines>

### Technical Details

Market Segment Addressed	Affordable multifamily buildings, tenants living in affordable multifamily buildings, affordable multifamily building owners, housing agencies, service providers, participating contractors, and other parties working with affordable multifamily buildings and building owners.
Delivery Method	NYSERDA provides funding directly to housing agencies ( <i>e.g.</i> , NYS HCR and NYC HPD) to serve affordable housing developers as part of the financing process.
Eligible Measures	Measures include but are not limited to: <ul style="list-style-type: none"> <li>• Building envelope</li> <li>• Energy recovery ventilation</li> <li>• Energy management systems</li> <li>• Pipe insulation</li> <li>• Heat pumps for DHW and space heating</li> <li>• Air sealing</li> </ul>
Incentive Structure	NYSERDA is providing a per-dwelling unit incentive based on package of efficiency and/or electrification measures.
Key Partners	Housing agencies ( <i>e.g.</i> , NYS HCR, NYC HPD, Public Housing Authorities), service providers, and other housing intermediaries

### Implementation Milestones (2024-2025)

Year	Milestone	Status
2024	<ul style="list-style-type: none"> <li>• Assess viability of packaged window heat pumps as an effective electrification approach/model for NYCHA housing and broader NY multifamily market.</li> <li>• Pending success of demonstration phase, initiate broader implementation phase of Clean Heat for All initiative and install additional packaged window heat pumps</li> <li>• Begin contracting with second cohort of projects selected under FHI new construction pilot program with NYC HPD.</li> <li>• Initiate second phase of HPD/NYSERDA partnership (REDi: EB) to incentivize heat pump electrification retrofits.</li> </ul>	In Progress

#### 4.2.3 Technical Assistance for Affordable Multifamily Buildings

Increasing the performance of existing affordable multifamily buildings at scale requires support beyond direct incentives for building owners, as technical and information gaps can limit the ability of housing agencies, financiers, and other housing intermediaries to implement energy efficiency upgrades. Technical support, in the form of engineering studies and IPNAs, can help building owners maximize available program incentives to inform capital planning and achieve greater energy savings. This section highlights the various approaches to supporting the

adoption of energy efficiency through the provision of technical support and resources to the affordable multifamily ecosystem.

NYSERDA administers the FlexTech program, which offers a cost share model for building owners to receive funding to conduct an energy study on their building. AMEEP projects interested in technical assistance may receive support through the FlexTech program. The audits completed must meet FlexTech Program requirements.<sup>75</sup> Multifamily building owners and their representatives in need of a study can work with their utility point of contact, who will coordinate with NYSERDA to arrange funding for the study, or with NYSERDA directly. The owner and their representative may select a service provider from NYSERDA's FlexTech network of consultants or an Independent Service Provider to perform the audit, and to help in developing a project work scope. Eligible work scopes will receive cost sharing for the study, helping to ease the cost burden on the affordable buildings. Afterwards, the project is executed under the utility-administered incentive program. New and additionally, NYSERDA will now offer a more streamlined FlexTech study offering to support small-to-mid size LMI buildings.

Housing agencies often do not have in-house technical capacity or resources to drive increased energy performance of their portfolios, and access to performance data is key to advancing the underwriting of clean energy projects. NYSERDA's Onsite Energy Manager ("OsEM") program offers funding for Multifamily buildings or portfolios to hire a dedicated full-time or part time onsite energy manager. This staff person can assist building owners in improving the facility's(ies) energy operations. NYSERDA will offer an owner's representative program that will provide tools, technical assistance and capital planning services to help underserved multifamily building owners and operators get through project planning and implementation barriers of low-carbon and/or energy efficient upgrade projects. For this reason, NYSERDA works with housing agencies and financiers to identify gaps in available performance data and invests in the development of data sets that can be used to aid in determinations on underwriting and build confidence among financiers and housing agencies. NYSERDA also provides technical assistance and funding for NYC HPD, NYC HDC, and NYS HCR preservation programs to drive greater energy performance, build internal capacity, and assist owner teams. Similarly, NYSERDA provides technical assistance to support CEI and the Retrofit Electrification Pilot, as discussed in [Section 4.2.2](#).

**Objectives:**

- Conduct comprehensive energy audits for existing affordable and market rate multifamily housing utilizing vetted energy service providers

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<sup>75</sup> See, <https://www.nyserda.ny.gov/All-Programs/FlexTech-Program>



- Subsidize energy audit costs to incentivize market adoption of conducting such audits
- Develop report that covers: the relevant building information (*e.g.*, building’s energy usage, annual energy costs by fuel type, rate tariff); evaluated measure findings, which includes but is not limited to a description of what was evaluated, analysis results, proposed conditions, and recommendations and reasons for recommendations; economic analysis of evaluated measures; and additional benefits, such as greenhouse gas reduction, IPNA compliance, Local Law compliance, and environmental benefits. The report is intended to inform decision makers on how to reduce energy costs and incorporate clean energy into their capital planning.
- Establish a scope of work for customers interested in energy efficiency programs (*e.g.* AMEEP).
- Conduct assessment of electrification and electrification-ready opportunities.
- Ensure smooth hand-off of projects from NYSERDA Flex Tech program to AMEEP

### ***Technical Details***

Market Segment Addressed	<p>Multifamily buildings with 5 or more dwelling units that meet the definition of affordability, where at least 25% of the households are at or below 80% of the State Median Income or Area Median Income, whichever is higher.</p> <p>Additionally, housing agencies (NYC HPD, New York City Housing Development Corporation (“HDC”), NYS HCR), energy service providers that specialize in multifamily housing, tenants living in affordable housing, and other parties working with affordable multifamily buildings and building owners.</p>
Delivery Method	Utilize framework of NYSERDA consultants; coordination with housing agencies to provide necessary support
Eligible Study Areas	<ul style="list-style-type: none"> <li>• Energy efficiency technical analyses</li> <li>• Investigations of an advanced technology or system</li> <li>• Creation of a long-term energy plan</li> <li>• Investigation of deep energy savings</li> <li>• Investigation of Clean Heating and Cooling Systems including Air Source Heat Pumps, Ground Source Heat Pumps, Variable Refrigerant Flow, and Solar Heating and Cooling</li> </ul>
Incentive Structure	Cost-share up to 75% of cost of technical assistance services
Key Partners	Housing agencies ( <i>e.g.</i> , NYS HCR, NYC HPD, Public Housing Authorities), service providers, and other housing intermediaries

### *Implementation Milestones (2024-2025)*

Year	Milestone	Status
2024	<ul style="list-style-type: none"><li>Recommend consideration of electrification and/or electrification-readiness as part of any subsidized technical assistance to enable long-term building decarbonization efforts</li></ul>	Ongoing
	<ul style="list-style-type: none"><li>Modify technical assistance offerings to increase engagement with disadvantaged communities</li></ul>	Planning
2025	<ul style="list-style-type: none"><li>Plan transition to next iteration of NYSERDA technical assistance programs</li></ul>	Planning

#### **4.2.4 RetrofitNY<sup>76</sup>**

New York State’s existing affordable multifamily buildings offer great potential for energy savings and greenhouse gas emissions reductions. Traditional energy efficiency programs targeted at multifamily buildings typically reduce on-site energy consumption by up to 30%. Greater building performance, on the order of 70% of on-site energy consumption reductions, can be achieved by undertaking a deep energy retrofit, which consists of insulation of the shell, installing HVAC equipment, and lighting, among other upgrades. Despite the significant benefits of conducting deep energy retrofits on multifamily buildings, there are several barriers to scaling deep energy retrofits in the affordable multifamily building market segment. The deep energy retrofits currently being done are complex, not replicable, and are not cost effective.

Since its public launch in 2018, RetrofitNY has identified key barriers to scaling deep energy retrofits in New York State and beyond. Key major barriers include underinvestment, industry fragmentation, high customer acquisition costs, and misallocation of risks. These current market failures drive up costs and hamper rapid decarbonization in the building sector.

Lowering building owner upfront costs will greatly increase adoption rates of deep energy retrofit solutions. Sizing the market opportunity and pricing the value of deep energy retrofits, which includes avoided costs, new sources of revenue, and reduced risk of the retrofit solution is key to reducing upfront capital requirements.

The RetrofitNY program has led or supported the following market interventions to realize an end-state solution and develop a retrofit value chain that is both time and resource efficient:

- Subsidize energy audit costs to incentivize market adoption of conducting such audits
- Warranty for offsite manufactured whole building retrofit solutions

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<sup>76</sup> RetrofitNY was approved as part of the Clean Energy Fund LMI Chapter, and with the transition to the Statewide LMI Portfolio, is now included in this Implementation Plan.

- Qualify retrofit companies capable of turnkey delivery of replicable solutions
- Marketplace and customer acquisition platform
- Support the development of financial products and market mechanisms that effectively value the outcomes of fully electrified buildings
- Loan loss reserve fund (or first loss reserve) for whole building retrofit solution ecosystem
- Product testing and tech transfer support
- Coordination on R&D investment areas
- Coordination on workforce development initiatives
- Reduce insurance costs for the construction and operation of carbon neutral buildings
- Engagement with investors
- Direct financial support for retrofit projects

Addressing the barriers and market development areas laid out above continues to be critically important. However, NYSERDA has sunset the RetrofitNY initiative, effective end of 2023. NYSERDA has gained significant insights from the RetrofitNY initiative and will publish its lessons learned to share with key stakeholders and help inform future program design and implementation to serve the MF LMI sector.

### ***Technical Details***

Market Segment Addressed	Affordable housing buildings owned by Public Housing Authorities, and privately owned multifamily affordable housing buildings regulated, financed or subsidized by affordable housing agencies or housing finance agencies such as NYS HCR, NYC HPD, the New York State Housing Finance Agency, and HDC. NYSERDA will subsequently expand its target market to other building sectors containing typologies that are a good fit for the solutions developed.
Delivery Method	<p>The administration of RetrofitNY includes:</p> <ul style="list-style-type: none"> <li>• The development of high-level criteria that the architecture, engineering, technology, and construction industry will need to meet to create the retrofit solutions.</li> <li>• Creating the demand side of a new market for deep energy retrofits by aggregating a large number of units that will commit to implement the solutions to be designed.</li> <li>• Qualifying solution providers, component manufacturers and building owners that would be eligible for demonstration pilots through periodic funding rounds.</li> <li>• Organizing a design-build process to select and test the developed solutions through demonstration pilots. Using lessons learned from funding rounds, NYSERDA will organize subsequent rounds to improve the solutions until they meet all predefined criteria and adapt them to additional building types. To</li> </ul>

	<p>ensure replicability, scale and impact, NYSERDA is analyzing New York's affordable housing portfolios to identify the most prevalent building typologies in the state.</p> <ul style="list-style-type: none"> <li>• Facilitating innovative financing by interested private sector lenders to leverage energy and operational savings to provide additional capital to buildings.</li> <li>• Hosting investor groups to bring needed investment to companies with technologies that can drive cost compression of solutions and developing the New York supply chain for high efficiency building components.</li> <li>• Promoting broad adoption of these deep-retrofit solutions as preservation strategies for the affordable housing stock and encourage their adoption across the multifamily housing market.</li> </ul>
Key Partners	<ul style="list-style-type: none"> <li>• Public Housing Authorities</li> <li>• NYS Affordable Housing regulatory agencies including NYS HCR and NYC HPD</li> <li>• Housing Finance Agencies including New York State Housing Finance Agency, and HDC</li> <li>• Private building owners</li> <li>• Builders, developers, architects, suppliers, engineers, building scientists, building technology firms and other service providers</li> <li>• Private financing companies, insurance and re-insurance companies, and energy service companies</li> <li>• Department of Energy</li> </ul>

### *Implementation Milestones (2025)*

Year	Milestone	Status
2025	<ul style="list-style-type: none"> <li>• Continue sunset of RetrofitNY program and ensure that projects that have advanced through key stage gates receive support before program is closed</li> </ul>	In Progress
2025	<ul style="list-style-type: none"> <li>• Publish lessons learned and insights from RetrofitNY program on NYSERDA's website</li> </ul>	Future

### 4.2.5 Multifamily LMI Decarbonization Demonstration Projects

NYSERDA's Multifamily LMI Decarbonization Demonstration Projects initiative is focused on supporting comprehensive, multi-year decarbonization projects in the LMI MF sector. This initiative will support a limited number of demonstration projects, including 1) comprehensive projects that demonstrate repeatable approaches to phased decarbonization for upstate LMI MF

buildings; 2) a limited number of large-building comprehensive energy efficiency and building electrification projects in very large Multifamily buildings, such as Mitchell Lama buildings, in partnership with the affordable housing agencies; 3) projects that test repeatable models for making progress on comprehensive decarbonization for off-cycle retrofits in LMI MF; and 4) retrofits that capture and re-utilize waste heat to reduce energy consumption and prepare LMI MF buildings for decarbonization.

#### Objectives:

- Work in partnership with public and private portfolio owners of Multifamily LMI buildings to develop repeatable strategies for cost-effective decarbonization of existing LMI Multifamily buildings;
- Support partnerships between building owners, consulting engineers, technology providers, financing entities and others to scale cost-effective decarbonization strategies;
- Fund comprehensive projects that demonstrate repeatable pathways for decarbonization of upstate LMI Multifamily buildings;
- Fund comprehensive projects that demonstrate repeatable pathways for decarbonization of very large LMI Multifamily buildings, such as Mitchell Lama buildings;
- Fund comprehensive projects that demonstrate repeatable pathways for “off-cycle” decarbonization of LMI Multifamily buildings (e.g. when buildings are not going through a refinancing process)

#### Technical Details

Market Segment Addressed	LMI Multifamily statewide
Delivery Method	<ul style="list-style-type: none"> <li>• NYSERDA runs competitive solicitation(s) to develop cohorts of LMI MF project teams. These project teams will include building owners, consulting engineers, technology providers and others. NYSERDA provides funding to selected teams for the development of long term carbon reduction roadmaps as well as their near term retrofit strategies. The selected teams then have the opportunity to submit proposals to a NYSERDA competitive solicitation for the implementation of their retrofit strategies.</li> </ul>
Key Partners	<ul style="list-style-type: none"> <li>• Affordable housing agencies</li> <li>• LMI MF portfolio owners</li> <li>• Engineers, architects</li> <li>• Technology providers</li> <li>• Financial entities interested in funding low-income multifamily housing upgrades</li> </ul>

### *Implementation Milestones (2024-2025)*

Year	Milestone	Status
2024	<ul style="list-style-type: none"><li>• Build first cohort of LMI Multifamily Demonstration partners</li><li>• Fund first round of LMI Multifamily Demonstration projects</li></ul>	Future
2025	<ul style="list-style-type: none"><li>• Support design, procurement and construction of LMI Multifamily Demonstration projects</li><li>• Publish lessons learned and key insights from LMI Multifamily Demonstration Program</li></ul>	Future

### **4.3 Affordable New Construction**

High performance and emissions free new construction can significantly reduce the energy consumption and related costs in the residential sector than would otherwise be expected, delivering not just energy bill savings for residents and building owners, but also improving the health and comfort of residents and providing resilient and sustainable housing stock that delivers long term energy savings and carbon emission reductions. Despite the many benefits, only a small portion of residential new construction target and execute emissions free design. This can be attributed to several market factors including constraints with current building and design practices and higher first costs associated with the new construction of buildings that will have the lower energy loads required to allow for emissions free performance. There is also a general lack of awareness of the long term financial, health, and environmental benefits associated with these buildings; and limited availability of performance data and off-the-shelf design and building specifications. The Program Administrators recognize current market constraints and will continue to seek to scale the design and construction of new and substantial renovations in the affordable housing market by working with market partners and stakeholders within the new construction and affordable housing sector. This includes the network of housing agencies, builders and developers, architects, engineers, and financiers to address the market barriers associated with building to higher levels of energy efficiency. The Program Administrators have converted their market engagement strategy to deliver incentives and services directly within the public housing agencies, and have reduced other financial incentive opportunities and technical support in the market.

#### **Objectives:**

- Improve building performance through reduction of site energy use and electrification of affordable new construction, with the goal of emissions free performance
- Support trades and developers to advance engineering, design, construction practices, and performance verification
- Identify and test replicable models for achieving lower energy loads and emissions free performance in new affordable housing
- Advance integrated design solutions that are replicable, with a focus on cost optimization
- Continue to support New York State and New York City housing agencies, funding authorities, and municipalities in their efforts to secure the most efficient, durable, resilient, and healthy housing, based on technical and economic feasibility, while striving to maximize effective use of the resources available to achieve those goals

- Increase information about, awareness of, and demand for construction for new and the substantial rehab of emissions free single family and multifamily buildings that will have lower energy use and substantially reduced operating costs.
- Support and build designer's capacity and expertise to complete the designs, analyses, and research needed to complete emissions free projects.

### **Overview**

NYSERDA administers programs that target the new construction of affordable housing the State, which provides:

- Technical and financial support to public housing agencies
- Technical assistance to projects seeking to achieve high performance energy efficient buildings, including support for the design of the emissions free housing.
- Incentives to housing developers and builders for projects already enrolled in the now-closed standard offer pipeline programs.
- Recognition for the exceptional design and construction of demonstration projects that deliver affordable housing through the Buildings of Excellence Competition.
- Financial support for the marketing, design, and new construction of single-family homes, town homes, and for emissions free communities that deliver affordable housing.
- Market development support that includes integrated design and construction protocols, and the development of data and information resources to document success stories and lessons learned that can be used to provide cost/benefit justification.
- Financial support for the architecture and engineering firms to complete design, analysis, research, modeling, and marketing affordable housing projects through the Buildings of Excellence Early Design Support Program.

### **Technical Details**

Market Segment Addressed	Builders, developers, owners, architects, engineers, energy modelers and other construction entities for new affordable single family or multifamily buildings or substantial renovation (in the form of conversion to affordable housing) of existing commercial buildings.
Delivery Method	Incentive support for affordable new construction projects participating in the standard offer programs will continue until projects are completed. New project incentives will be provided primarily via Housing Agencies, in particular via the Clean Energy Initiative, to builders and developers, with some funding awards through the Buildings of Excellence competition also continuing. Technical assistance will be provided to housing agencies, architects, engineers, builders, and developers.
Eligible Measures	The Affordable New Construction initiative assesses the overall performance of the building. For existing pipeline in the standard offer program, envelope, decarbonized HVAC, appliances, and efficient lighting measures are all eligible for inclusion in incentivized projects.
Incentive Structure	For affordable new construction and gut renovation projects currently in the standard offer program pipeline, incentives are provided by NYSERDA based on the level of energy savings achieved, as outlined in the program

	<p>documents. The Buildings of Excellence competition provides incentives for innovative design and construction of zero carbon emitting multifamily buildings. Housing Agencies are offering Clean Energy Initiative incentives for new construction and renovation projects that meet efficiency and decarbonization performance criteria. Where the Utilities and NYSERDA will be offering incentives, the Program Administrators will coordinate to streamline program participation as necessary and ensure the greatest impact of ratepayer funding. The Building Better Homes program targets support for emissions free single-family homes and town homes. The Buildings of Excellence Early Design Support Program provides funding for technical support for designers of emissions free multifamily buildings.</p>
Key Partners	<p>NYSERDA has developed channel partner relationships with organizations that deliver professional development and educational opportunities to the market to facilitate the dissemination of best practices and cost compression opportunities to builders, developers, designers, energy modelers and consultants.</p> <p>Target audience engagement will continue with key partners including community development corporations (“CDCs”), developers, builders, architects, engineers, housing intermediaries, non-profit builders, the Passive House community of designers and consultants, and Home Energy Rating System (“HERS”) raters to bring projects to fruition and gather data to develop and disseminate best practice solution sets.</p> <p>NYSERDA is working with NYS HCR and NYC HPD to offer complementary strategies to the market. Via the Clean Energy Initiative and Future Housing Initiative, respectively This coordination will continue.</p> <p>Program Administrators will continue to work directly with housing agencies to incorporate funding into new construction projects to offset incremental costs associated with higher performance.</p>



### *Implementation Milestones (2043-2025)*

Year	Milestone	Status
2024	<ul style="list-style-type: none"><li>• Continue supporting expanded integration with public housing agencies</li><li>• Launch of Round 5 of the Buildings of Excellence Competition for multifamily building design</li><li>• Launch of the updated Building Better Homes program</li><li>• Continuation of Buildings of Excellence Early Design Support Program</li><li>• Utilize data and successful solution sets from decarbonization projects to deploy information through channel partners, conferences, and other general awareness activities</li></ul>	In Progress
2025	<ul style="list-style-type: none"><li>• Continue supporting expanded integration with public housing agencies</li><li>• Utilize data and successful solution sets from decarbonization projects to deploy information through channel partners, conferences, and other general awareness activities</li><li>• Launch of Round 5 of the Buildings of Excellence Competition for multifamily building design</li><li>• Continuation of the updated Building Better Homes program</li><li>• Continuation of Buildings of Excellence Early Design Support Program</li></ul>	Future

#### **4.4 Pilots and Demonstrations<sup>77</sup>**

Opportunities for increasing access to energy efficiency solutions, building electrification and improving energy affordability are ever-evolving, with new technologies, applications, business and delivery models, and opportunities for cross-sector coordination emerging on a regular basis. To continuously improve the programs and offerings under the Statewide LMI Portfolio, the Program Administrators will continue to incorporate the piloting and demonstration of new technologies and approaches for serving LMI customers and communities.

Through pilot activities, the Program administrators seek to:

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<sup>77</sup> In general, the sections of this Implementation Plan use a similar template in presenting information. The content in certain sections does not readily conform to this template – notably [Section 4.4 Pilots and Demonstrations](#) and [Section 4.5 Building Electrification in LMI Homes](#); therefore, these sections use a more typical prose presentation.

1. Identify and test technologies and/or approaches for addressing the barriers to improving energy efficiency and adoption of building electrification in the LMI market segment;
2. Test approaches that can scale the adoption of energy efficiency and building electrification in the LMI market segment;
3. Prove models for improving the delivery of energy efficiency solutions and building electrification across the LMI market segment that can reduce administrative burden for customers and administrators; and
4. Determine innovative approaches for improving awareness and access to energy efficiency solutions and building electrification for DACs.

In 2022, NYSDERDA selected an LMI-focused marketplace concept through the Innovative Market Strategies<sup>78</sup> initiative to pilot, with the intending to test whether a holistic marketplace that combines education on the high-efficiency products, access to low-interest financing, and targeted incentives can provide an effective complement to traditional energy efficiency retrofit programs to advance equitable access to clean energy solutions and lower barriers to adoption of higher efficiency products. The pilot was launched in Spring 2023. The Pilot was completed in early 2024, and findings will be posted on NYSDERDA's website.

#### 4.5 Building Electrification in LMI Homes

Electrification in the LMI sector presents unique challenges and economic and institutional barriers. In markets where natural gas is less expensive than electricity, for example, switching from gas-fired boilers or furnaces to heat pumps risks increasing utility bills for LMI customers, who are least equipped to deal with higher living costs. Tenants in rental housing face the potential for additional monthly utility bills should a heat pump retrofit result in shifting costs from heating fuel (typically not paid by tenants) to in-unit electricity costs that are paid by tenants in direct metered and sub-metered buildings. Heat pumps are still not well integrated into existing benefits programs providing energy-related support to income-qualified households, such as HEAP.

Owners of affordable housing face significant barriers to heat pump retrofits as well. These owners tend to have low capital reserves available for retrofit projects, and other capital needs that are perceived as more urgent. The cost imbalance between gas and electricity can negatively impact the net operating income of buildings that convert from gas heat, and results in paltry energy cost savings to offset the upfront investment. Higher operating costs can jeopardize financing deals and can be a challenge, particularly for affordable housing finance agencies such as NYS HCR. Furthermore, many owners of affordable housing are restricted in their ability to raise rents, or face other restrictions based on their subsidy deals, adding to the difficulty of recouping an upfront investment in heat pumps.

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<sup>78</sup> <https://www.nysderda.ny.gov/All-Programs/Innovative-Market-Strategies-Program>

On the other hand, electrification offers health and other benefits to at-risk residents. Heat pumps can provide both heating and cooling services, presenting additional value to homes that previously had limited or no cooling systems. Through reductions in on-site combustion, electrification has been shown to reduce indoor pollutants that exacerbate respiratory illness.

As such, the Statewide LMI Portfolio investments in building electrification in the LMI market segment seek to maintain energy affordability and consumer protections, while providing these benefits and increasing access to clean energy solutions for LMI communities, households, and building owners. These building electrification investments will be used to better understand the LMI market, test strategies to accomplish the aforementioned goals, and support promising solutions to reaching scale.

As articulated in the NYS Clean Heat Implementation Plan,<sup>79</sup> NYSEDA has allocated \$30 million<sup>80</sup> of its \$250 million Clean Heating and Cooling Investment Plan for 2020-2025 to market interventions that provide clean heating and cooling solutions to the statewide LMI market segment, in four areas:

- ***Research and analysis:***  
Conduct market studies to inform NYSEDA and other market actors about barriers to electrification and ways to mitigate these with targeted solutions and best practices across various building types, as well as strategies to maintain affordability, all of which will inform pilot and demonstration efforts.
- ***Pilots and demonstrations:***  
Identify and fund potentially replicable and scalable models for LMI heat pump adoption that reduce known market and institutional barriers in critical LMI segments and provide data and examples that boost investor confidence.
- ***Short-term incentives:***  
Provide short-term statewide standard offer incentives that are combinable with other utility and government incentives to promote incorporation of heat pumps into low-income weatherization and affordable housing energy efficiency projects. These incentives will identify approximately 1,500 LMI homes and apartments that have undergone heat pump conversions, from which to collect data and other learnings.
- ***Consumer education:***  
Develop educational materials to help homeowners, building owners, and property managers operate and maintain heat pump systems optimally, in order to increase the impact and benefit of the heat pump installation.

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<sup>79</sup> See, NE: NY Proceeding, NYS Clean Heat: Statewide Heat Pump Program Implementation Plan (filed March 16, 2020 and updated September 1, 2024), Appendix A.

<sup>80</sup> In addition to the \$30 million investment in building electrification represented here, NYSEDA is investing an additional \$1 million as part of this work under the CEF.

In 2024, Program Administrators will continue to coordinate on these efforts to advance building electrification in the LMI market segment, with a particular focus on developing a cohesive framework for how building owners can layer available sources of upfront capital and preserve energy affordability while moving to electrification. This effort will continue to inform long term investments in building electrification for LMI homeowners and tenants in affordable housing. To encourage building electrification in existing affordable multifamily buildings, the Program Administrators have been and will continue in 2024 to explore opportunities to leverage the existing AMEEP program structure to incorporate electrification incentives while containing costs for both residents and buildings owners. In addition, NYSERDA will continue to work with DPS as data becomes available related to the operating cost of heat pumps, particularly through the implementation of the Energy Affordability Guarantee.

#### ***Implementation Milestones (2024-2025)***

Year	Milestone	Status
2024	<ul style="list-style-type: none"> <li>• Publish interim learnings from LMI heat pump demonstration study (short term incentives)</li> <li>• Socialize and begin implementing recommendations to State agencies from earlier market research on lowering programmatic, policy, and regulatory barriers to electrification in LMI multifamily housing.</li> <li>• Launch an LMI induction stove pilot supporting the decarbonization of cooking appliances in multifamily buildings.</li> </ul>	In progress
2024	<ul style="list-style-type: none"> <li>• Partner with sister agencies to develop guidance for affordable multifamily building owners on electrification: pathways to secure state, utility, and federal funding for heat pump projects; and technical, legal, regulatory, and business considerations for altering provision of building services to tenants.</li> </ul>	Future
2025	<ul style="list-style-type: none"> <li>• Launch follow-on research into policy and regulatory initiatives that can enable heat pump adoption in LMI housing</li> <li>• Launch a pilot study supporting rapid response heat pump conversions in situations where existing fossil heating systems are at or near failure, for 1-4 family homes.</li> <li>• Revise program rules to incorporate affordability and consumer protections learnings from research and evaluation of real-world projects</li> </ul>	Future

#### **4.6 Other LMI Initiatives**

In addition to the Statewide LMI Portfolio initiatives, NYSERDA administers other initiatives to increase access to clean energy solutions and improve energy affordability for LMI residents and

communities as part of the Clean Energy Fund Market Development Portfolio (“CEF Market Development Portfolio”).

#### 4.6.1 New York State Healthy Homes Value-Based Payment Pilot

The New York State Healthy Homes Value-Based Payment (“VBP”) Pilot, a joint effort by NYSERDA and the New York State Department of Health (“DOH”), seeks to develop a framework that allows New York’s managed care organizations (“MCO”) to fund residential healthy homes interventions<sup>81</sup> as part of their value-based payment arrangements with healthcare providers within the Medicaid Healthcare Delivery System.<sup>82</sup> By validating impacts such as healthcare cost savings and benefits to residents, and by providing market development support, including specification of services and guidance related to VBP contracting, the Healthy Homes Pilot facilitates the adoption of healthy homes treatments by MCOs as part of their Medicaid VBP Arrangements that incorporate social determinants of health.<sup>83</sup> Adopting this approach addresses avoidable medical costs associated with respiratory conditions such as asthma and also household injury, while encouraging third-party capital investment in residential energy efficiency through MCO adoption of healthy homes interventions within the VBP social determinants of health framework after the completion of the Pilot.

Approved in 2019, the Pilot is currently in the field, through mid-2025, with NYSERDA and NYS DOH collaborating to implement healthy homes interventions, planned for 500 Medicaid member homes and jointly evaluating the associated reduction in Medicaid cost savings and benefits for residents. Responsibilities for each agency include:

- NYSERDA

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<sup>81</sup> A residential healthy homes intervention combines energy efficiency and weatherization measures (*e.g.*, insulation and air sealing) with measures that address persistent respiratory health conditions such as asthma (*e.g.*, ventilation, moisture/mold mitigation, carpet removal), and includes additional measures aimed at home injury prevention (smoke and CO alarms, stair repair, electrical outlet covers). When implemented together, these interventions can improve occupant health, reduce energy bills and healthcare costs, and improve the comfort and safety of a home.

<sup>82</sup> New York State Medicaid has transitioned the managed care healthcare delivery system from a fee-for-service to a VBP model that links healthcare provider performance and reimbursement through a pre-determined set of value metrics. Under the VBP model, MCOs (*i.e.*, healthcare plans such as Empire Blue Cross Blue Shield) enter into arrangements with healthcare providers or provider networks. To support local investment in activities that address social determinants of health (“SDH”), VBP arrangements require incorporation of a CBO engaging in work focused on SDH. Addressing substandard housing as an SDH intervention places energy efficiency and weatherization measures, when incorporated within a healthy homes intervention, within the DOH value-based payment model.

<sup>83</sup> In New York State, the Medicaid transition to a VBP framework, along with an existing infrastructure to deliver healthy homes services, provides a window of opportunity for healthy homes interventions to be considered a fundable healthcare expense. To aid in the VBP transition, DOH is required to administer pilots in cooperation with MCOs to test VBP models incorporating work addressing social determinants of health such as substandard housing. There is a current network of over 200 energy efficiency contractors in New York State, including more than 50 weatherization sub-grantees, who meet the conditions necessary to provide Medicaid services under VBP Arrangements.

- Funds Pilot activities, advises intervention planning related to energy and housing measures, facilitates and manages energy/housing services included in the Pilot, and assumes responsibility for data collection and evaluation activities related to energy measures/outcomes
- Provides market support intended to prepare the existing network of energy efficiency and residential improvement contractors to implement healthy homes interventions
- NY State Department of Health
  - Office of Health Insurance Programs secures MCO participation in the Pilot and oversees all VBP contracting activities.
  - Office of Public Health advises Pilot intervention planning related to asthma trigger reduction measures and asthma care management services, facilitates and manages direct health services included in the Pilot, and assumes responsibility for data collection and evaluation activities related to health measures/outcomes
  - Center for Environmental Health advises Pilot intervention planning and evaluation activities related to home injury prevention measures

NYSERDA and NYS DOH have modified Pilot parameters and processes to continue to address complications resulting from the COVID-19 pandemic and to facilitate Pilot benefits and learnings and to ensure appropriate stewardship of budgeted funds. Modifications made in 2023 include expanding Pilot eligibility to include Medicaid members who are not currently associated with Pilot VBP arrangements to increase the number of households that can be served and expanding service regions to include counties in Western and Central New York along with all five New York City boroughs. In 2024, counties in the Hudson Valley were added among the Pilot service regions, with the aim of increasing the number of comprehensive interventions in owner-occupied single-family residences. The Pilot schedule and implementation needs are closely monitored and continue to be adjusted to remain responsive to participant needs and market conditions. The budget and impacts for the NYS Healthy Homes VBP Pilot can be found in [Appendix D](#).

#### **Objectives:**

- Develop a framework that allows New York’s MCOs to fund residential healthy homes interventions in partnership with energy/residential improvement contractors as part of their value-based payment arrangements with healthcare providers within the Medicaid Healthcare Delivery System
- Validate healthcare cost savings and benefits to residents—including energy, health, and safety—through evaluation undertaken in partnership with NYS Department of Health
- Support residential market preparedness for incorporation of healthy homes interventions into the Medicaid Healthcare Delivery System standard business practice, including specification of services and guidance related to VBP contracting

- Encourage third-party capital investment in residential energy efficiency with MCO adoption of healthy homes interventions supportive of addressing social determinants of health through VBP beyond the Pilot

### Technical Details

Market Segment Addressed	<ul style="list-style-type: none"> <li>• Managed care organizations (<i>i.e.</i>, health plans) operate within the Medicaid Healthcare Delivery System, contracting with healthcare service providers within the value-based payment framework to provide clinical care and other health-related services to Medicaid members</li> <li>• Energy efficiency/weatherization contractors provide energy efficiency and health and safety services and subcontract for additional environmental trigger reduction services, as needed, in residential dwellings within a given region</li> <li>• Health service provider networks (<i>e.g.</i>, physicians, hospitals, nursing and community health worker agencies) operate within the Medicaid Healthcare Delivery System to provide health services such as clinical care, in-home education, and referrals to community-based resources that address social determinants of health</li> <li>• Residents/customers (<i>i.e.</i>, Pilot participants that are high Medicaid utilizers) follow their clinical care plans and participate as necessary in the coordination of health service and dwelling service interventions</li> </ul>
Delivery Method	<ul style="list-style-type: none"> <li>• NYSERDA implements the Pilot in cooperation with the NYS DOH Office of Health Insurance Program, Office of Public Health, and Center for Environmental Health according to the responsibilities outlined in the introduction of <a href="#">Section 4.6.1</a></li> <li>• Participating MCOs identify eligible members and conduct outreach to potential participant households</li> <li>• The Pilot intervention's dwelling-based services are provided by NYSERDA-participating residential contractors qualified through a NYSERDA Request for Qualifications</li> <li>• The Pilot intervention's health services are provided by community health workers and registered nurses with specialized training who are affiliated with agencies that are partnered with participating MCOs through value-based payment arrangements</li> <li>• Program administration/implementation and technical assistance are provided through existing NYSERDA and DOH program operations infrastructure</li> </ul>

Eligible Measures	<p>Full intervention measures include:</p> <ul style="list-style-type: none"> <li>• Residential energy and environmental assessment</li> <li>• Energy efficiency measures (<i>e.g.</i>, envelope improvements, electric load reduction, heating system repair/replacement)</li> <li>• Environmental trigger reduction measures (<i>e.g.</i>, mold remediation, carpet removal, integrated pest management, ventilation)</li> <li>• Household injury prevention measures (<i>e.g.</i>, smoke alarms, carbon monoxide detectors, stair/railing repair, bathtub safety bar installation)</li> <li>• Community health worker support (<i>e.g.</i>, in-home education related to asthma self-management and medication adherence, supportive products, and coordination across providers); skilled nursing referrals, when applicable per health services criteria.</li> <li>• Resident education, guidance regarding community resources, and post-intervention follow-up</li> </ul>
Incentive Structure	<ul style="list-style-type: none"> <li>• All intervention services are provided at no cost to a Pilot-participating household.</li> <li>• Intervention dwelling-based services utilize an incentive structure based on existing NYSEDA residential programs (<i>e.g.</i>, EmPower+)</li> <li>• For planning purposes, average cost per project was estimated at approximately \$12,000, with flexibility in per-project cost determined according to scope of work evaluated by program staff</li> <li>• Additional allergen reduction products provided to Pilot participating households are valued at approximately \$250 per household, facilitated through a contract with American Lung Association</li> </ul>
Key Partners	<ul style="list-style-type: none"> <li>• NYSEDA has worked closely with the NYS DOH Office of Health Insurance Programs (inclusive of Medicaid), Office of Public Health, and Center for Environmental Health to identify the Pilot opportunity and position it in the most beneficial way for both NYSEDA and DOH.</li> <li>• In coordination with NYS DOH, NYSEDA has engaged with MCO executive staff who expressed interest in incorporating healthy homes interventions into their existing Value-Based Payment Arrangements or entering into new Arrangements based on the need for healthy homes services among their Medicaid members.</li> <li>• NYSEDA engaged representatives of the residential energy efficiency industry—including private contractors and weatherization subgrantees, local housing organizations, community-based organizations, and philanthropy on this specific Pilot opportunity and have received universal support for this Pilot work.</li> <li>• In coordination with New York State Department of Public Service, NYSEDA hosted seven stakeholder forums in 2018 to discuss barriers and opportunities to increase energy efficiency and access to clean energy solutions for LMI residents. The need for health and safety improvements was a primary barrier raised by stakeholders.</li> </ul>



### *Implementation Milestones (2024-2025)*

Year	Milestone	Status
2024	<ul style="list-style-type: none"><li>Complete draft of the Pilot outcome analysis, to be incorporated into the full Pilot evaluation</li></ul>	Planning

## 5. Customer Awareness, Outreach & Engagement

Awareness and education initiatives play a crucial role in making energy efficiency and energy affordability programs accessible to LMI customers. Historically, Program Administrators have found it difficult to reach LMI customers. A primary contributor to this dynamic is lack of awareness of incentive programs to promote energy efficiency and clean energy technologies in LMI communities. The success of the Statewide LMI Portfolio depends on a successful customer awareness, outreach, and engagement campaign. To that end, the Program Administrators will continue to design and implement strategies to engage LMI customers and affordable property owners. Additionally, continuing to expand the availability of educational and awareness driving media and content in different languages continues to be a priority. Further, new targeting techniques have been established to pinpoint customers in DACs.

Customer awareness, outreach and engagement initiatives build on existing program experience and provide a comprehensive and integrated statewide approach. These initiatives seek to:

- **Raise Customer Awareness About Portfolio Offerings**

In order for the Portfolio to be successful, LMI customers need to be made aware of the initiatives and services. The Program Administrators recognize the diversity of LMI New Yorkers and are focused on establishing an outreach campaign that is inclusive. This includes use of inclusive messaging and imagery as well as delivery channels that are most likely to reach LMI audiences. To achieve this, community partners will continue to be engaged to assist in raising customer awareness of the benefits of participation. Additionally, since many income-qualified households are unaware of their eligibility for these programs, it will be important to provide broad-based market-wide awareness and outreach to help those residents who may not self-identify as LMI find the appropriate resources for their situation.

- **Motivate Customers to Take Action**

Once customers are made aware of initiatives and services for which they may qualify, the next step is to engage customers in taking action. Messaging has been designed to help customers understand the participation process and benefits of taking action. In certain cases, customers are also more likely to take action if they feel a brand has a positive impact or plays a role in their community. According to the Nielsen Hispanic

Report 2023,<sup>84</sup> the Hispanic audience is 83% more likely to think something is favorable if this is the criteria.

- **Provide Easy Access to Participation**

The initiatives will continue to be designed with ease of customer application and participation in mind. Contractor information is made readily available for those customers seeking assistance after an application is submitted for one or more initiatives.

As part of this effort, the Utilities continue to identify supplemental activities to support LMI initiatives and cross-promote EmPower+ and AMEEP, including distribution activities through food banks and other activities. These activities are described in greater detail in [Section 5.3](#).

The following key initiatives comprise the Statewide LMI Portfolio’s Customer Awareness, Outreach and Engagement approach:

#### LMI Portfolio Marketing

- Statewide branding
- Centralized NY Energy Advisor website and its associated marketing campaign
- Expanded and improved market-wide consumer education landing environment designed to assist users in finding the best incentive programs and offers available to them, in particular, helping all income-eligible consumers find LMI resources like the Energy Advisor and Clean Energy Hubs quickly and easily.
- Branded hard-copy program outreach and informational materials to complement the online NY Energy Advisor website
- Delivery of community-based marketing and paid advertising

#### Community-Based Outreach, Education, and Engagement Partnerships

- An enhanced network of statewide, community-based partners to leverage the customer outreach and engagement capabilities of LMI stakeholder organizations and contractors
- Community Energy Engagement Program (“CEEP”) and Regional Clean Energy Hubs

#### Community-Based Customer Engagement and Innovative Outreach Initiatives

- Delivery of community-based partnerships that combine distribution of low-cost energy efficiency measures with education about energy efficiency and clean energy and information on how to participate in other Portfolio programs
- Neighborhood-based delivery model

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<sup>84</sup> Nielsen “Hispanic audiences in focus: Trust in media – the key factor driving shift to streaming”  
<https://www.nielsen.com/wp-content/uploads/sites/2/2023/09/hispanic-report-2023.pdf>

- Innovative outreach approaches that leverage Utility engagement channels.

This comprehensive approach will continue to allow the Program Administrators to reach residents and communities with opportunities for improving energy affordability, accessing clean energy solutions, improving awareness and education of clean energy opportunities, connecting with essential services,<sup>85</sup> and otherwise accessing the full range of benefits of the clean energy economy.

The following sections provide further Information on the featured elements listed above.

## 5.1 LMI Portfolio Marketing

Statewide LMI Portfolio marketing includes four broad elements: (1) statewide branding; (2) the NY Energy Advisor website; (3) branded hard-copy program outreach and informational materials to complement the online NY Energy Advisor website; and (4) delivery of community-based marketing and paid advertising.

### Statewide Branding

The Program Administrators have developed statewide branding, including names, logos and designs, to provide consistent messaging and increased awareness of the Statewide LMI Portfolio in conjunction with localized marketing implemented by the Utilities in their respective territories. The following programs currently use statewide branding: EmPower+, AMEEP, and FlexTech. NY Energy Advisor and its marketing campaign represent an additional statewide branding effort and name.

Key considerations in facilitating effective statewide branding include development of a clear, concise message as to the program being offered, the Program Administrator leading the effort, customer eligibility, and the benefits of participation.

### NY Energy Advisor

In November 2021, the Program Administrators developed and launched a web-based customer hub platform, called NY Energy Advisor, to provide streamlined, easy-to-access information about LMI initiatives and services for LMI customers, affordable multifamily property owners and managers, contractors, and stakeholders throughout the state. The platform connects its users with relevant LMI programs and services, including energy efficiency, renewable energy, and energy education materials. It is also designed to reduce customers' need to search for assistance on multiple websites.

The site provides:

- Information on the Portfolio offerings

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<sup>85</sup> These are services outside of the LMI initiative that facilitate participation in the initiative, which may be referred to as "wraparound." For example, a customer may need a new roof in order to qualify for attic insulation under the EmPower NY initiative and receives the new roof from a community program that funds such repairs.

- Links to program intake forms
- Contact information on how to access community outreach representatives (see [Section 5.3](#), below)
- Links to other programs and resources (i.e., WAP, etc.), as appropriate for the audience
- Access to information in multiple languages (18 languages currently)
- Translation functionality to automatically self-translate into English, Spanish, Mandarin, and Russian

To promote awareness of the NY Energy Advisor, the Program Administrators deploy paid media marketing campaigns, which include social media posts, digital banners, and public service announcements (both broadcast television and radio) with media outlets. Marketing materials are adjusted and updated over time based on paid media metrics and customer feedback. Paid media efforts are optimized in real-time to maximize efficiencies within the buy and engagement. The paid media effort as well as any organic interaction are monitored so that it can be determined how many visitors to energy advisor are clicking through to learn more, apply now or even making the decision to reach out to their Community Hub contact to have a discussion.

Additionally, a New York Energy Advisor tool kit containing resources for stakeholders is available on the NYSERDA-hosted LMI Resources New Efficiency: New York webpage.<sup>86</sup> The toolkit includes downloadable fact sheets, posters, and social media information for use by stakeholders to promote the NY Energy Advisor. A tutorial video demonstrating how to use the NY Energy Advisor website is also available. Additionally, the Regional Clean Energy Hubs help promote NY Energy Advisor and its benefits in their discussions with New York State Residents.

The costs for marketing, advertising, consumer perception/awareness surveys, and maintenance of the NY Energy Advisor are shared by the Program Administrators.

An agreement was developed and executed between NYSERDA and each of the Utilities that delineated the process for reviewing details related to the marketing and maintenance of NY Energy Advisor. NYSERDA will continue to take the lead with marketing and maintenance, engaging a contractor to provide the necessary work. The agreement set in place cost sharing responsibilities, a process to review details of the campaign, costs associated, and how and when reimbursements to NYSERDA will be made.

In the future, the Program Administrators will continue efforts to increase market awareness and use of NY Energy Advisor. The site will also be adjusted and updated based on evaluation of paid media, stakeholder, and customer feedback.

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<sup>86</sup> <https://www.nysenda.ny.gov/All-Programs/Residential-and-Property-Owner-Income-Eligible-Programs/LMI-Stakeholder-Resources-New-Efficiency-New-York>

### **Hard Copy Customer Education Collateral and Multilingual Communications**

While the online NY Energy Advisor is a critical resource for providing information to LMI customers, approximately 7% of adults nationwide, of which 25% are aged 65 and older,<sup>87</sup> do not have access to a computer or mobile device in their home. To address this fact, the Program Administrators complement the NY Energy Advisor website with written materials that provide similar branded messaging about Portfolio offerings. These materials are distributed for use by contractors and Regional Clean Energy Hubs to hand out to their clients. The focus of the materials is providing initiative information and encouragement for customers to take action by calling their utility, NYSEERDA's customer service center, or Clean Energy Hub to receive assistance in applying for participation. Currently, collateral is available in several languages (English, Chinese, Russian, and Spanish).

### **Community-Based Marketing and Paid Advertising**

To complement the NY Energy Advisor and the community-based outreach and education elements described above, the Program Administrators may conduct multi-lingual marketing through paid media, with an emphasis on marketing delivered through local news outlets and community officials and opinion leaders. The Program Administrators continue to leverage their community-based partners' relationships with local media and ability to garner earned media to promote programs.

Additional marketing continues to include paid advertising to raise awareness about the LMI programs.

Paid advertising has included the following areas:

- Digital Out of Home ("OOH") targeted in DAC regions throughout the State
  - Digital OOH screens located in gyms, bodegas, gas stations, public transportation kiosks and other locations will feature NY Energy Advisor "start saving" messaging
  - OOH marketing messaging will be served in multiple languages and utilize the language settings on a users' mobile device to auto-translate the content into that language upon scanning the QR code featured on the ads (currently available in English, Russian, Spanish and Mandarin)
- Google search
- Social media
- Streaming Radio
- Advanced Television (TV which is connected to the internet)
- Digital Banners
- Public Service Announcement
- To-date, NY Energy Advisor has produced the following metrics:

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<sup>87</sup> Pew Research Center – April 2, 2021 "7% of Americans don't use the internet and who they are"

- 959,153 unique users
- 1,268,838 website sessions
- Additionally, to-date the PSA promoting the benefits of Energy Advisor have aired on Television over 2,800 times across 17 markets for a market value of \$1,217,000
  - The creative was so well received, NYSERDA used the concept as a jumping off point for the marketing campaign in 2024 and will continue using it in 2025.
- Direct mail/email campaigns tailored to LMI customers who have been identified as categorically eligible based on geographic eligibility guidelines, or who are identified in utility customer databases as being eligible for HEAP or low-income rate discounts

#### Objectives:

- Provide consistent messaging statewide
- Develop clear, concise messaging as to what is being offered, where to find the offerings, who is offering them, who qualifies for the offerings, and the value of participation
- Provide streamlined, easy access to LMI initiatives and services for LMI customers, affordable multifamily property owners and managers, contractors, and stakeholders throughout the state
- Complement the NY Energy Advisor website with written materials that provide similar branded messaging about Portfolio offerings
- Identify and develop solutions to overcome barriers of engaging LMI customers and other stakeholders
- Raise LMI customer awareness about Portfolio initiatives and services
- Establish inclusive outreach campaign that reflects the diversity of LMI New Yorkers

#### Technical Details

Market Segment Addressed	LMI customers, affordable multifamily property owners and managers, contractors, and stakeholders throughout the state
Delivery Method	NY Energy Advisor website, hard copy collateral, paid advertising, community engagement
Key Partners	Community-based organizations

### Implementation Milestones (2024-2025)

Year	Milestone	Status
2024	<b>NY Energy Advisor:</b> <ul style="list-style-type: none"><li>• Continue to identify key opportunities to evolve outreach for both online and offline audiences</li><li>• Build upon success and learnings to date by leveraging highest-performing paid media placements and expanding language access across channels</li><li>• Leverage Regional Clean Energy Hubs, Community and Partner feedback to create assets, collateral and continue to build awareness for NY Energy Advisor and it's solutions for LMI New Yorkers.</li><li>• Continue to monitor activity and optimize campaign performance to maximize impact.</li></ul>	In Progress
2025	<b>NY Energy Advisor:</b> <ul style="list-style-type: none"><li>• Planning for 2025 is currently in-progress</li><li>• Implement Marketing and Outreach plan in 2025 that will mirror the strategy that has worked in 2024 and add in learnings from the DAC-targeted Digital OOH</li></ul>	Future

## 5.2 Community-Based Outreach, Education, and Engagement Partnerships

Access to clean energy programs and resources and the broader set of benefits they bring can be more difficult for LMI households and DACs, due to the various economic and institutional barriers present in the LMI customer segment. To increase adoption of energy efficiency and realize the benefits of clean energy, it is therefore important for Program Administrators to work with CBOs, who are trusted resources in the community, to connect residents with program opportunities, increase awareness and education of clean energy issues, educate residents on ways to reduce energy consumption and bills, leverage workforce development opportunities, and identify services necessary to undertake energy efficiency projects. To ensure programs address barriers noted in the NY State Disadvantaged Community Barriers and Opportunities Report,<sup>88</sup> it is also essential to have regular ongoing dialogue and engagement with community partners in the design of programs intended to serve diverse communities.

The Regional Clean Energy Hubs:

- Act as a trusted local resource for community members to learn more about the

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<sup>88</sup> <https://climate.ny.gov/-/media/Project/Climate/Files/21-35-NY-Disadvantaged-Communities-Barriers-and-Opportunities-Report.pdf>

energy-related programs and services available to them

- Increase awareness of these programs and services by leveraging the expertise and trust of local community organizations— particularly those with a proven track record of engaging disadvantaged communities
- Develop outreach and engagement strategies to elevate the needs of communities and residents into program and policy development
- Address gaps in and advancing diversity of the clean energy workforce by connecting residents with educational, training, and job opportunities and small businesses with resources to support economic development

### **Expansion of Existing LMI Community Partnerships**

NYSERDA is expanding partnerships with community-based organizations in several ways to increase meaningful participation of residents in disadvantaged communities and the organizations that serve them in designing a clean energy future that seeks to restore historic harm from past environmental injustices.

NYSERDA has established Regional Clean Energy Hubs (“Hubs”), one in each of the ten economic development regions across the state, with the exception of the New York City region where three hubs have been established, to assist communities and residents with accessing clean energy programs and solutions. Investment in the establishment of Hubs is intended to build capacity at the local level and position DACs to participate in and benefit from the clean energy economy.

### **Objectives:**

- Increase awareness of and access to clean energy solutions and opportunities
- Increase consumer uptake of clean energy projects, with support for accessing wraparound (non-energy) services and resources
- Expanded and improved market-wide consumer education landing environment designed to assist users in finding the best incentive programs and offers available to them, in particular, helping all income-eligible consumers find LMI resources through resources such as the Energy Advisor and Clean Energy Hubs quickly and easily.
- Advance local capacity to engage with community members about clean energy policy, technologies, and opportunities
- Increase public participation in energy planning and program coordination activities
- Increase 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
- Increase the diversity of participating contractors in the clean energy sector
- 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



In addition, NYSEDA has partnered with State agencies, along with community-based organizations representative of disadvantaged communities across New York State, to establish the Energy Equity Collaborative (“the Collaborative”). The Collaborative is a statewide advisory group for ongoing, high-level, cross-cutting engagement with stakeholders representing disadvantaged communities and other historically marginalized groups. The Collaborative is a space to seek input on initiative planning and program development with a focus on LMI and DAC challenges, priorities, and opportunities.

### *Technical Details*

Market Segment Addressed	Homeowners, renters, contractors/builders, affordable property owners, small commercial entities and nonprofits with an emphasis on DACs
Delivery Method	<ul style="list-style-type: none"> <li>• Hubs deploy Energy Advisors within each region to connect community members to clean energy and related programs and resources</li> <li>• Hubs deploy energy literacy workshops to educate customers on energy efficient technologies and self-install energy measures</li> <li>• Hubs increase awareness and program access assistance to clean energy programs and resources by attending outreach events</li> <li>• Hubs increase uptake of clean energy projects, with support for accessing wrap around services and resources.</li> <li>• Hubs will Implement community campaigns and local projects and pilots</li> <li>• The Collaborative, made of State and CBO organizations, is established to provide feedback on relevant policies and program design considerations, working to create relationships that foster trust and engagement of DACs in program planning</li> </ul>
Key Partners	<p>Key community-based partners will play an important role with the Regional Clean Energy Hubs and generally include:</p> <ul style="list-style-type: none"> <li>• CBOs</li> <li>• Local, state, and federal agencies</li> <li>• Regional Economic Development Councils (“REDCs”)</li> <li>• Ecumenical organizations and communities</li> <li>• Philanthropic organizations</li> <li>• Low-income and affordable housing advocacy groups</li> <li>• Community coalitions and associations</li> <li>• Homeowner and tenant associations</li> <li>• Educational institutions</li> <li>• Corporations and trusts</li> <li>• Banks and financial institutions, particularly community development financial institutions (“CDFIs”)</li> <li>• Environmental, health, and energy efficiency advocacy groups (national, statewide, and local)</li> <li>• Skilled trade groups, unions, and engineering societies</li> <li>• Retailers and installation contractors</li> <li>• Community event organizers (fairs, home shows, etc.)</li> <li>• Small businesses and Business Improvement Districts (“BIDs”)</li> </ul>

	<ul style="list-style-type: none"> <li>• Utilities</li> <li>• Indigenous Nations and People</li> </ul>
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### *Implementation Milestones (2024-2025)*

Year	Milestone	Status
2024	<ul style="list-style-type: none"> <li>• Hubs to complete Regional Assessment and Barriers Analysis (RABA) identifying barriers and recommendations to improve DAC/LMI entry into clean energy programs and opportunities</li> <li>• Participate in the development of the MyEnergy portal</li> <li>• Hubs to complete their Outreach and Equitable Engagement Plans outlining the next two years of program stakeholder engagement</li> <li>• Hubs to continue to attend outreach events within Hub regions, provide program referrals to NYSERDA and Non-NYSERDA programs and elevate program feedback to relevant NYSERDA and Non-NYSERDA program teams</li> <li>• Hubs to coordinate with Joint Utilities to attend outreach and engagement events, host regular coordination meetings, and elevate utility customer needs</li> </ul> <p>The Collaborative activities to include:</p> <ul style="list-style-type: none"> <li>• Provide input on LMI policy and program initiatives</li> <li>• Identify focus areas and priorities for the Collaborative working groups</li> <li>• Develop engagement guidelines and processes for capturing priorities, directing engagement activities to the Collaborative</li> <li>• Establish a plan for expansion of the Collaborative network to include a larger and more diverse set of DAC stakeholders</li> </ul>	In Progress

2025	<ul style="list-style-type: none"> <li>• Hubs to begin launching community campaigns and local pilot programs</li> <li>• Utilize OTDA HEAP contact data to provide targeted outreach</li> <li>• Launch the expanded Collaborative and a shared portal for collaboration and communication</li> <li>• The Collaborative will host webinars and events that create shared learning environments on community-centered best practices for equitable program development and implementation</li> <li>• The Collaborative will support the integration of feedback generated in Hubs' stakeholder forums and Regional Analysis of Barriers Assessments into program and policy design input opportunities</li> </ul>	Future
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### 5.3 Community-Based Customer Engagement and Innovative Outreach Initiatives

In addition to their collaboration in administering statewide LMI portfolio initiatives, the New York Utilities partner with organizations in their service territories who directly or indirectly serve or advocate on behalf of the LMI community. Utilities plan to continue these partnerships to engage eligible LMI customers through customized educational efforts and the distribution of free or discounted direct install measures directly or through trusted local organizations on an opt-in basis.<sup>89</sup> These engagement initiatives provide customers with easy access to energy efficiency information, promote proven technology (*e.g.*, installation of LED lighting measures), and increase awareness of other efficiency programs offered in the Portfolio, including direct install measures, behavioral action recommendations, and general efficiency education.

Further, the Utilities, in coordination with NYSERDA, test and implement innovative approaches to customer awareness and engagement through leveraging Utility engagement channels.

Types of initiatives include:

- Working with local food banks to distribute LEDs to low-income customers
- Distributing energy efficiency kits to customers participating in Utility low-income bill discount programs
- Working with measure vendors, local community-based organizations, and public agencies to provide free or heavily discounted energy efficiency measures to LMI customers
- Distributing home energy reports (HERs) to LMI customers with customized energy efficiency recommendations

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<sup>89</sup> Sponsoring utilities will avoid distribution of unsolicited measures, which can lead to low installation rates and customer complaints.

- Leveraging Utility engagement channels to test and implement innovative approaches to advancing customer awareness and participation in EmPower+, such as text message campaigns, enhanced messaging to customers on utility energy assistance programs (“EAPs”), social media marketing, landlord-focused outreach, and efforts to improve demographic gaps in participation. (More detail is provided below.)

As part of the LMI JMC, the Program Administrators share experiences and lessons learned from offering these initiatives with each other. Looking towards the future, the Program Administrators plan to continue to work together to share insights into these different programs and explore further coordination on similar initiatives.

Details regarding specific Utility initiatives are provided below:

### **Central Hudson**

Central Hudson has launched a Weatherization Kit program under the Portfolio to distribute weatherization measures at no cost through partnerships with local not-for-profit organizations that serve low-income customers through 2024. This initiative targets customers utilizing services from organizations such as the United Way and food pantries. Additional information is provided with the kits to educate customers about Empower+ and Comfort Home. Central Hudson will evaluate opportunities to extend this program into 2025.

### **Con Edison**

Con Edison has long emphasized energy efficiency education and outreach initiatives for LMI customers. The Company’s Efficiency Starter program delivered energy saving kits to customers participating in Con Edison’s Energy Affordability Program. This opt-in program provided customers with LED lightbulbs, faucet aerators, and a low-flow showerhead. Con Edison has also maintained partnerships with food banks to distribute LED lights. The Company’s Smart Kids program sought to educate students and teachers in Title 1 schools in Con Edison’s service territory about energy efficiency through specified curriculum and hands on engagement with kits containing energy efficiency equipment. In 2024, Con Edison closed out the above programs by disseminating all remaining inventory through existing Food Banks partnerships.

### **NFGDC**

In 2024 and going forward NFGDC’s outreach programs continue to provide weatherization kits to area block clubs, community-based organizations, and area non-profits. The majority of these block clubs and organizations support customers within DACs or those in low-income areas.

Although this program benefited LMI customers, the funding related to this effort came from non-LMI sources, so associated savings and participant numbers are not included in this Plan.

### National Grid

National Grid continues to work with food banks across the Niagara Mohawk territory to distribute LED bulbs to customers with brochures containing information on energy efficiency and payment assistance programs such as EmPower+, HEAP, National Grid's Energy Affordability Program ("EAP"), and assistance provided by National Grid's Consumer Advocates. This initiative started in the Buffalo area by collaborating with Feed More WNY and has since expanded across the greater Syracuse and Albany metropolitan areas to cover all of the Niagara Mohawk territory. National Grid also collaborates with NYSERDA's Regional Clean Energy Hubs to continue distributing LED bulbs and these informative program materials.

In Q4 2024, National Grid is launching a Weatherization Health & Safety Program based on a pilot the company ran in 2022-2023. This program is approved through the KEDNY/KEDLI rate case, outside of this Statewide LMI Portfolio, and addresses health and safety measures that are not typically covered in the existing energy efficiency programs for 1-4 family LMI homes. Eligibility for this program will include all low-income customers and those moderate-income customers that reside in a DAC in National Grid's KEDNY and KEDLI service territory. Customers who apply to the EmPower+ or KEDLI HEAT program but are found to have health and safety issues beyond those the programs can address, will have the opportunity to remediate those barriers through the Weatherization Health & Safety Program before proceeding through EmPower+ or KEDLI HEAT with energy efficiency measures. Measures addressed include but are not limited to gas leaks and pipe repair, ventilation remediation, roof repair or replacement, and other suspected electrical issues and environmental hazards such as vermiculate or moisture abatement. After projects participate in this program to mitigate these health and safety issues, they will be required to participate in either EmPower+ or the KEDLI HEAT program to continue with an energy efficiency scope. More details about this program can be found in the Weatherization Health and Safety Program Implementation Plan, including details about program metrics and reporting cadence.<sup>90</sup>

Finally, National Grid is committed to promoting and increasing customer participation in the Empower+ program administered by NYSERDA. Based on the lessons learned from marketing and outreach activities executed in 2022 through 2024 in partnership with other Joint Utilities from the 1-4 Family subcommittee, including ABC email messaging, National Grid text message, postcards and social media campaigns and Joint Utilities customer surveys, National Grid has

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<sup>90</sup> Case 23-G-0226, Proceeding on Motion of the Commission as the Rates, Charges, Rules, and Regulations of KeySpan Gas East Corporation d/b/a National Grid Gas, KEDNY and KEDLI Weatherization Health and Safety Program Implementation Plan ("*Weatherization Health and Safety Program Implementation Plan*") (filed July 1, 2024)

compiled a consistent and regular outreach and education plan. It is tied to monthly Empower+ referral process and consists of preemptive text message sent to the monthly referral batch of customers with the phone number on file, with the primary call to action to get acquainted with Empower+ program by visiting National Grid's dedicated webpage specific to the program. From there and upon reading a high-level program description, benefits and eligibility requirements, the customer can proceed to either learn more by clicking the link to NYSERDA's Empower+ website or proceed directly to the application. Furthermore, the same batch of customers will receive a reminder text message the following month, after they have received welcoming package in the mail from NYSERDA along with the paper application, with the main call to action directing customers to apply to Empower+ program via the provided direct link to the application. Finally, customers without a phone number on file will be compiled over the time frame of a quarter and will be receiving marketing collateral via email if an email is on record. Prior to 2024, due to billing system restrictions in the KEDNY service territory, National Grid was only providing monthly customer referrals to the EmPower+ program from the NMPC service territory. A billing system conversion was completed in KEDNY in Q3 of 2024 and therefore National Grid began referring customers in the KEDNY service territory to the EmPower+ program. National Grid has not needed to refer customers from KEDLI to NYSERDA since the KEDLI HEAT program is the offering for those customers. Beginning in 2026, however, National Grid will begin referrals of KEDLI customers to NYSERDA for EmPower+ since the KEDLI HEAT program will no longer be offered.

### **New York State Electric and Gas**

NYSEG continues efforts to educate customers on energy efficiency through various programs and outreach. Internal Customer Advocates and internal Government and Community Relations department(s) regularly team up on joint local outreach activities. Energy savings kits are distributed to eligible customers at community events and not-for-profit organizations that are located within a DAC and/or highly likely to service low-income customers through NYSEG's LMI Distribution Program. Customers are provided immediate solutions to help reduce energy usage while at the same time providing references and visibility to EmPower+ and AMEEP.

NYSEG also uses the Retail Products Program to supplement reach to LMI customers by establishing increased focus toward retail channels that have a higher propensity to serve LMI customers. NYSEG incorporated the School Kits outreach into its LMI portfolio. Teachers in Title I schools in NYSEG territories may opt in to receive energy saving kits for their classes. The program teaches students and parents energy saving practices through curriculum-integrated lesson plans and firsthand engagement with kits containing energy efficiency equipment. Each kit cross promotes EmPower+ and other energy efficiency programs.

Finally, EmPower+ banners are displayed at kiosks in bill payment centers, which provide the value proposition of EmPower+ as well as the 800-number and website information to enroll.

### **Orange & Rockland**

Orange and Rockland will continue and expand their food bank kit offering, which includes messaging to educate customers about energy efficiency and includes a link to Orange & Rockland's EmPower+ webpage to drive awareness of the program. O&R will use the existing online marketplace to validate LMI customers and offer no cost products or enhanced rebates to food bank patrons.

Orange and Rockland will continue its education and outreach at local schools, senior centers, community centers, and other community organizations. The focus will be on Title 1 schools, DAC communities, and LMI communities. Outreach will consist of available energy efficiency, bill assistance, and workforce development programs, while providing energy saving tips and the benefits of renewable energy.. Participants will receive educational material to take home as well as customized rebates/coupons for energy saving products on the online marketplace. .

### **Rochester Gas and Electric**

RG&E continues efforts to educate customers on energy efficiency through various programs and outreach. Internal Customer Advocates and internal Government and Community Relations department(s) regularly team up on joint local outreach activities. Energy savings kits are distributed to eligible customers at community events and not-for-profit organizations that are located within a DAC and/or highly likely to service low-income customers through NYSEG's LMI Distribution Program. Customers are provided immediate solutions to help reduce energy usage while at the same time providing references and visibility to EmPower+ and AMEEP.

RG&E also uses the Retail Products Program to supplement reach to LMI customers by establishing increased focus toward retail channels that have a higher propensity to serve LMI customers. RG&E incorporated the School Kits outreach into its LMI portfolio. Teachers in Title I schools in RG&E territories may opt in to receive energy saving kits for their classes. The program teaches students and parents energy saving practices through curriculum-integrated lesson plans and firsthand engagement with kits containing energy efficiency equipment. Each kit cross promotes EmPower+ and other energy efficiency programs.

Finally, EmPower+ banners are displayed at kiosks in bill payment centers, which provide the value proposition of EmPower+ as well as the 800-number and website information to enroll.

### **Objectives:**

- Increase LMI customer awareness of the financial, comfort, health & safety and environmental benefits of energy efficiency and clean energy

- Promote participation in deeper LMI efficiency programs
- Capture direct savings from the installation of no- or low-cost energy efficiency measures (e.g., LED bulbs, showerheads, faucet aerators, advanced power strips) to LMI customers through trusted community partners
- Provide behavioral recommendations to improve LMI customer home comfort and efficiency
- Build customer trust in and appreciation of participating organizations and sponsoring utilities, leading to greater willingness to participate in other LMI programs
- Build relationships with participating community-based partners, leading to their participation in promoting other Statewide LMI Portfolio programs

### ***Technical Details***

Market Segment Addressed	LMI customers
Delivery Method	Information and measures distributed through community-focused methods and community organizations that are trusted and frequented by LMI customers. Measures may also be distributed directly from the utilities through program vendors.
Eligible Measures	Programs may include LED lightbulbs, energy efficiency kits (which may contain measures such as LED lightbulbs, low-flow showerheads, and faucet aerators), and other low-cost measures
Incentive Structure	Varies, but generally no cost to customers
Key Partners	Key partners include: <ul style="list-style-type: none"> <li>• Food banks</li> <li>• School districts</li> <li>• Non-profits</li> <li>• Local community organizations</li> <li>• Local public agencies</li> </ul>



### *Implementation Milestones (2024-2025)*

Year	Milestone	Status
2024	<ul style="list-style-type: none"><li>• Utilities to continue to offer, assess, and improve Community-Based Customer Engagement Initiatives (as described above in Section 5.3)</li><li>• Utilities to adopt, assess, and implement strategies for improving customer awareness of and participation in EmPower+ on an individual or collective utility basis</li></ul>	In Progress
2025	<ul style="list-style-type: none"><li>• Utilities to continue to offer, assess, and improve Community-Based Customer Engagement Initiatives (as described above in Section 5.3)</li><li>• Utilities to synthesize lessons learned from prior/current efforts and best practices in advancing customer awareness of and participation in EmPower+ to inform future planning.</li><li>• Utilities to adopt, assess, and implement strategies for improving customer awareness of and participation in EmPower+ on an individual or collective utility basis, where appropriate and possible.</li><li>• Utilities to focus on phasing out incentive offerings in this program category and continuing outreach to customers receiving EmPower+ referrals.</li></ul>	Future

## 6. Coordination with External Program Administrators and Other Organizations

In addition to coordination across the Program Administrators, there are additional opportunities to work with programs administered by New York State agencies, local government, and CBOs to reduce redundancy and to increase coordination, effectiveness, and impact for the customer.

**Table 7: Summary of Statewide Coordination Efforts**

Organizations	Nature of Coordination
New York State Department of Environmental Conservation	<ul style="list-style-type: none"><li>• Explore opportunities to improve energy and health outcomes in environmental justice and DACs</li><li>• Support operationalization of Climate Act investment requirements</li></ul>

DOH	<ul style="list-style-type: none"> <li>• Develop an approach to quantify the health outcomes and healthcare cost reductions associated with energy efficiency improvements</li> <li>• Explore opportunities for developing a programmatic approach for addressing energy efficiency and healthy homes improvements for low-income customers</li> </ul>
NYS HCR	<ul style="list-style-type: none"> <li>• Support the development of technical capacity and access to performance data (<i>e.g.</i>, benchmarking)</li> <li>• Explore systematic improvements to policies and processes so that the benefits of clean energy are embedded upstream of tenants and building owners, such as: <ul style="list-style-type: none"> <li>○ Exploring opportunities to increase energy performance requirements associated with the Low-Income Housing Tax Credit and the Qualified Allocation Plan;</li> <li>○ Advancing adoption of an IPNA, in coordination with other key stakeholders including housing authorities;</li> <li>○ Exploring the development of underwriting criteria for high performance new construction and preservation projects, based on reduced operational costs; and</li> <li>○ Piloting model-based utility allowances in New York, in coordination with other key stakeholders.</li> </ul> </li> <li>• Alignment between WAP and EmPower+ to reduce overlap and administrative burden for the agencies, service providers, and customers</li> <li>• Support mobilization of New York's \$289 million WAP funding allocation under the Bipartisan Infrastructure Law of 2021</li> </ul>
NYS Office of Temporary and Disability Assistance	<ul style="list-style-type: none"> <li>• Maximize the reach of HEAP funds through increased consumer education and targeted efficiency services</li> </ul>

Low-Income Energy Program Interagency Task Force <sup>91</sup>	<ul style="list-style-type: none"> <li>• Development of a cohesive approach to serve low-income energy customers across the programs administered by New York State agencies to reduce redundancy and increase coordination, effectiveness and impact for the customer.</li> </ul>
PSEG Long Island	<ul style="list-style-type: none"> <li>• Coordination between KEDLI's HEAT Program and PSEG Long Island's REAP program, where the Program Administrators exchange leads so customers can participate in both gas and electric energy efficiency programs</li> <li>• Explore opportunities to more closely coordinate the AMEEP program with multifamily programs offered by PSEG Long Island</li> </ul>
Long Island Power Authority	<ul style="list-style-type: none"> <li>• Coordination with LIPA through programming such as EmPower+ and HEAT to leverage statewide models</li> </ul>

The Joint LMI Management Committee will continue to examine and address the coordination of work with external program administrators to see that the Statewide LMI Portfolio effectively delivers clean energy solutions to LMI customers and communities.

## 7. Benefit Cost Analysis

This section presents the results of the Benefit Cost Analysis (BCA) for the Statewide LMI Portfolio of initiatives.<sup>92</sup>

The Program Administrators calculated the BCA following the NYS BCA Framework<sup>93</sup> and subsequent DPS guidance.<sup>94</sup> A common approach was used to calculate the Portfolio BCA found in [Table 8](#) and Program Administrator-specific assumptions were used according to utility BCA handbooks.

<sup>91</sup> The Low-Income Energy Program Task Force was formed by the Office of the Governor in May 2016 to bring together the New York State agencies responsible for administering low-income energy programs for developing a cohesive strategy for serving LMI energy customers, increasing coordination and sharing information.

<sup>92</sup> While the Program Administrators provided an updated BCA in 2023 (*i.e.*, NE: NY Proceeding, Statewide Low- to Moderate-Income Portfolio Implementation Plan, Version 2 (filed April 29, 2022)), a new BCA was not conducted for the Nov. 1, 2022 filing or May 1, 2023. A new BCA will be conducted in conjunction with the next annual Implementation Plan to be filed, scheduled for filing in the fall of 2024.

<sup>93</sup> Case 14-M-0101, *Proceeding on Motion of the Commission in Regard to Reforming the Energy Vision*, Order Establishing the Benefit Cost Analysis Framework, (issued January 21, 2016).

<sup>94</sup> Clean Energy Guidance CE-07: *Utility-Administered Energy Efficiency Utility Filing Requirement Guidance* (issued May 14, 2018).

The BCA results reflected in Table 8 will continue to be refined as the initiatives are further developed. The BCA results for the Societal Cost Test (“SCT”) include the benefits associated with reduced carbon emissions, calculated in line with the most recently updated values promulgated by the New York DPS for 2024 and beyond.<sup>95</sup> Revisions to program designs, and reduced activity for some utility programs, drove the differences between 2023 and 2024 BCA’s projected benefits, which saw a modest reduction in SCT BCA scores overall. Portfolio BCA results are largely comparable for the Utility Cost Test (“UCT”), though there are changes for individual Program Administrators.

Portfolio-level BCA results are shown in Table 8.<sup>96</sup>

**Table 8. Statewide LMI Portfolio BCA Results**

	Societal Cost Test (SCT)			Utility Cost Test (UCT)		
	Benefits	Costs	Benefit Cost Ratio	Benefits	Costs	Benefit Cost Ratio
2023	\$352,915,716	\$645,654,323	0.55	\$188,452,684	\$193,056,662	0.98
2024	\$432,013,336	\$582,830,459	0.74	\$234,628,842	\$178,344,501	1.32
2025	\$277,436,695	\$377,416,943	0.74	\$147,289,796	\$71,756,120	2.05
2026	\$34,100,464	\$435,008,922	0.08	\$17,172,153	\$63,662,354	0.27
2027	\$30,708,113	\$30,599,650	1.00	\$14,928,408	\$22,659,544	0.66
2028	\$18,185,238	\$11,504,398	1.58	\$8,755,579	\$7,497,434	1.17
2029	\$352,915,716	\$645,654,323	0.55	\$188,452,684	\$193,056,662	0.98

## 8. Evaluation, Measurement, & Verification Approach

As described below, the Program Administrators take a coordinated approach to estimating savings and evaluating LMI initiatives. This includes standardized statewide savings estimation approaches, collaborative evaluation activities, and continuous monitoring of and feedback on Performance Metrics. Specific program-level savings estimation approaches and evaluation schedules are detailed in the VGS Specifications, which are coordinated across the Program Administrators and are jointly filed with this Implementation Plan.<sup>97</sup>

<sup>95</sup> <https://dps.ny.gov/system/files/documents/2022/11/ce-10-data-dictionary-and-scorecard-guidance.pdf>

<sup>96</sup> The BCA results shown in Table 8 do not reflect the updates to Con Edison’s budgets and benefits provided in the July 1, 2024 refiling of the Implementation Plan. A new BCA will be conducted in conjunction with the next annual Implementation Plan to be filed, scheduled for filing in the fall of 2024.

<sup>97</sup> The initial VGS Specifications were filed in December 2020. NE: NY Proceeding, Consolidated LMI VGS Specifications (Filed December 14, 2020). Updated VGS Specifications are being filed concurrently with this Implementation Plan.

## 8.1 Savings Estimation

In general, the Program Administrators rely on the TRM and best practices to estimate savings and achieve VGS goals. Given that LMI customers often have older and less efficient equipment than their market-rate peers, and given the need to fully account for LMI customer savings, an existing baseline approach is employed where possible. To minimize administrative challenges that could result from using different baseline assumptions for different customer segments, particularly within a program that concurrently serves both LMI and non-LMI customers, the following overarching savings estimation approaches will continue to be used:

### Prescriptive

For prescriptive measures, details of existing conditions in LMI customer residences may be substituted for parameters in the TRM to calculate savings.<sup>98</sup> The TRM currently contains language describing this methodology.<sup>99</sup> Further, program manuals such as the AMEEP Program Manual contain guidance for providing information about existing conditions to be used in savings calculations. Additionally, baseline studies or other evaluation materials will be leveraged, where available, to calculate an average existing condition baseline that approximates the type and age of equipment currently installed by LMI customers. This will allow for a uniform deemed savings approach for common prescriptive measures within the Statewide LMI Portfolio, either at a statewide or more granular level depending on availability of data and measure-specific characteristics.<sup>100</sup> Program Administrators plan to develop average existing condition baselines, facilitated through the TRM Management Committee, to allow for a uniform deemed savings approach for common prescriptive measures within the Statewide LMI Portfolio, either at a statewide or more granular level depending on availability of data and measure-specific characteristics. Using evaluation and other research data to determine these average baseline values will promote coordination of evaluation methodologies among Program Administrators (discussed in further detail below), and will allow for increased savings accuracy while minimizing the burden of customer data collection. This average baseline approach will also preserve implementation efficiencies by streamlining application processing and savings calculations.

If, for a particular measure, baseline studies or other supporting evaluation material is not available for determining an average existing condition baseline, standard TRM assumptions will be used until new information becomes available through evaluation activities or through other pertinent research facilitated by the TRM Management Committee (“MC”). Evaluation activities

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<sup>98</sup> <https://www.nyseda.ny.gov/All-Programs/Residential-and-Property-Owner-Income-Eligible-Programs/LMI-Stakeholder-Resources-New-Efficiency-New-York/NYS-Affordable-Multifamily-Energy-Efficiency-Program>.

<sup>99</sup> Technical Resource Manual, Version 10 - Filed December 22, 2022 (effective January 1, 2023), p. 5, “Application of Methods for Low- and Moderate-Income (LMI) Residential.” <https://dps.ny.gov/technical-resource-manual-version-10-filed-december-30-2022-effective-january-1-2023>

<sup>100</sup> For example, a granular approach may be warranted for certain HVAC measures to distinguish the prevalence of steam heating in downstate multifamily buildings. Where granular data is not available, a statewide average should be used.

that will contribute to improving LMI-specific baseline assumptions will be detailed as part of established ETIP/SEEP and VGS Specification processes.<sup>101</sup> As baseline assumptions become available, they will be documented in VGS Specifications, incorporated into programs, and, through coordination with the TRM MC, documented in the TRM.

### Custom

For custom measures, project-specific existing condition baselines are used. Analyses of current custom calculation tools, and integrating the TRM's Custom Category 6 standard simulation approach for custom measures and packages are ongoing, and updates will be made to align savings methodologies in these tools with the TRM and an existing condition approach as necessary.

## 8.2 Performance Metrics Planning

In [Section 2.4](#), above, the Plan addresses Performance Metrics for the Statewide LMI Portfolio, including Table 1: Portfolio Objectives and Performance Metrics. As noted in Table 1, for certain of the metrics, EM&V is a key component, including the following:

Portfolio Customer Experience	
Increase customer Portfolio awareness	Percentage of LMI customers that learn about Portfolio initiatives from various sources ( <i>e.g.</i> , NY Energy Advisor website, Utility or NYSERDA outreach materials, contractors, etc.)
Achieve high customer satisfaction	Participation satisfaction rating
Advance energy affordability for LMI customers	Participant bill savings, annual and lifetime

As such, a key component of EM&V-related planning is addressing these (and possibly other) performance metrics.

Program Administrator EM&V team activity to research and evaluate performance for these metrics may include the following:

- Process evaluations will assess both sources of program awareness and participant satisfaction via surveys
- Impact evaluations will assess annual and lifetime savings

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<sup>101</sup> For each program a Program Administrator administers, the Program Administrator will submit a VGS Specification. Where there are coordinated programmatic and/or evaluation activities, VGS Specifications will be coordinated as well.

### 8.3 VGS Specifications

The Program Administrators have continued to undertake VGS activities since the 2020 Implementation Plan filing, including continued development and revisions of the VGS Specifications. The VGS Specifications for the Statewide LMI Portfolio are organized into four sections: Existing 1-4 Family Homes, Existing Affordable Multifamily Buildings, Affordable New Construction, and Additional LMI Initiatives. Key activity and issues for each of these categories is described below; additional information and detail is provided in the VGS Specifications themselves.

#### Existing 1-4 Family Homes

The NYSEERDA-administered EmPower program completed an evaluation in 2022.<sup>102</sup> The program has a 62% realization rate for electric programs and 73% for gas programs. The Assisted Home Performance with Energy Star (“AHPwES”) program has a 53% realization rate for electric programs and 66% for gas programs. As the 1-4 Family Homes programs are shifted from separate EmPower NY and AHPwES programs to the combined EmPower+ program, the Program Administrators will update the VGS activities and the VGS Specification to reflect this shift. With the launch of the statewide EmPower+ program in 2023, a Gross Savings Analysis is in progress. The evaluation will be completed in Q3 2025, and the results will apply to the program from EmPower+ launch onwards. National Grid also operates the Home Energy Affordability Team (HEAT) program in its KEDLI territory on Long Island. HEAT, a gas-only program, is currently using a realization rate of 98%. An evaluation for HEAT is in progress to verify gross savings and process; the workplan was filed in Q3 2024 and the evaluation report will be filed by Q4 2025.<sup>103</sup>

#### Existing Affordable Multifamily Buildings

The Program Administrators are engaged in a joint effort to conduct a process and impact evaluation study statewide for AMEEP. An evaluation vendor was selected in Q1 2024. The joint process evaluation workplan was filed at the end of Q3 2024.<sup>104</sup> The downstate impact evaluation workplan was filed at the end of Q3 2024<sup>105</sup> and the upstate impact evaluation workplan will be filed by the end of Q4 2024. Upon completion of the AMEEP evaluation, Program Administrators will apply results retrospectively, beginning January 1, 2022. Until completion of this evaluation, the Program Administrators will continue to use a 70% placeholder “adjustment factor” for statewide planning and forecasting purposes only, except

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<sup>102</sup> NYSEERDA Residential Retrofit Impact Evaluation (PY 2017-Q1 2019), filed in October 2022.

<sup>103</sup> National Grid NY LMI KEDLI HEAT Foodbank Evaluation Workplan, filed September 30, 2024, in Matter 16-02180.

<sup>104</sup> Process Evaluation of the Affordable Multifamily Energy Efficiency Program, filed September 30, 2024, in Case 15-M-0252 and Matter 16-02180.

<sup>105</sup> Downstate NY Impact Evaluation of the Affordable Multifamily Energy Efficiency Program, filed September 30, 2024, in Case 15-M-0252 and Matter 16-02180.

for certain projects in Con Edison's territory following the "Non-Comprehensive Pathway." For projects under that pathway that are acquired between January 1, 2022 through December 31, 2023, Con Edison is applying applicable realization rates as detailed in the Verified Gross Savings Specification – Statewide LMI Portfolio: Existing Affordable Multifamily Buildings.

Where applicable, the Program Administrators will continue to use company-specific evaluation results for multifamily programs run prior to AMEEP for savings acquired in 2020 and 2021.

### **Affordable New Construction**

Program areas offering incentives underwent Gross Savings Analysis for the program period 2016-2022. An initial VGS RR of 0.76 for electric savings and 0.85 for natural gas and propane were calculated for NYSEERDA's single family New Construction initiative (inclusive of LMI) for program period Q3 2016-Q2 2021. Alternative prospective RRs of 1.04 for electric savings and 1.13 for natural gas and propane were calculated for program years Q3 2021 to Q4 2022; however, per DPS VGS guidance, AP RRs cannot exceed 1.0 and reporting will only show AP RRs of 1.0. An updated VGS RR of 0.86 for electric savings and 1.04 for natural gas and propane savings were calculated for the period starting Q1 2023. These RRs were finalized in Q2 2023.<sup>106</sup>

### **Additional LMI Initiatives**

EM&V for the programs addressed in this specification is conducted separately by the relevant Program Administrator. Programs include:

- NYSEERDA: NYSEERDA administers Healthy Homes and the Solar for All program.
- Central Hudson: Central Hudson's Community Weatherization Kit program provides pipe wrap, door sweeps, and spray foam to customers that utilize services from organizations such as United Way.
- Con Edison: Con Edison has offered additional programming to its LMI customers through Food Bank Bulb Distribution ("Food Bank") as part of its Retail Lighting program. Additionally, Con Edison has offered an Efficiency Starter program, which provides free kits of low-cost energy savings measures to LMI customers. Since 2020, Con Edison has also been sending focused messaging to LMI customers via Home Energy Reports (HERs). In 2023, Con Edison incorporated the Smart Kids program into its LMI portfolio of programs and initiatives. Teachers in Title I schools in Con Edison's service territory may opt in to receive energy savings kits for their classes. Con Edison will sunset these programs in Q4 2024.
- National Grid: National Grid offers a Food Bank LED Light Bulb Giveaway in their Niagara Mohawk Service Territory. An evaluation is in progress to verify gross savings and

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<sup>106</sup> NYSEERDA New Construction Phase 1 Market and Impact Evaluation (PY Q3 2016-Q2 2021; Q3 2021-Q4 2022; 2023), filed in September 2023.



process; the workplan was filed in Q3 2024 and the evaluation report will be filed by Q4 of 2025.<sup>107</sup>

- NYSEG/RG&E: NYSEG/RG&E distributes selected Energy Star certified equipment and energy saving measures through its LMI Distributions Program. An evaluation for the LMI Distributions Program was completed at the end of 2023 and the final evaluation report was filed on December 28, 2023.<sup>108</sup> In 2024, NYSEG/RG&E continued a School Kits Program to distribute free energy saving kits to students who meet low-income qualifications. An evaluation for the School Kits Program is in progress to verify gross savings; the workplan was filed in Q2 2024 and the evaluation report will be filed in Q4 2024.<sup>109</sup>
- Orange and Rockland: Orange and Rockland continues to provide LMI customers with food banks kits as part of its LMI Customer Engagement program. Orange and Rockland will also continue and expand its enhanced rebates to LMI customers through its online marketplace. In 2024, Orange and Rockland continued an education and outreach program to schools, senior centers, community organizations and religious organizations. These educational presentations and outreach will be focused on low-income communities and include topics such as current energy efficiency and bill assistance programs, energy saving tips, renewable energy education, and career opportunities in the energy industry.

Collectively, these activities continue to provide important insight needed in the short term to optimize Portfolio offerings and increase the number of households served annually, while allowing the Program Administrators to work through data sharing, evaluation funding, evaluation timing, and other complexities.

To facilitate future coordinated evaluation activities, the Program Administrators will continue to identify specific opportunities for collaboration, focusing on activities where Program Administrators share customers and/or Implementation Contractors, or otherwise overlap. The Program Administrators will also continue to collaborate on data collection tools and practices to streamline statewide evaluation and will embed LMI data collection into existing program evaluation when LMI customers are being served.

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<sup>107</sup> National Grid NY LED Foodbank Evaluation Workplan, filed September 30, 2024, in Matter 16-02180.

<sup>108</sup> NYSEG RGE PY2023 LMI Distributions Impact Process Evaluation Final Report, filed December 28, 2023, in Matter 16-02180.

<sup>109</sup> NYSEG-RGE 2024 School Kits Evaluation Work Plan, filed April 25, 2024, in Matter 16-02180.

## 8.4 General Approach to Evaluation of Initiatives

Evaluation activities for the Statewide LMI Portfolio are coordinated among the Program Administrators where possible and are designed to provide insight into Performance Metrics tied to savings, participation, customer experience, and Portfolio efficiencies.

It is important to note that statewide evaluations may be difficult to implement for all programs given that each Program Administrator may have a unique Portfolio mix, and that Utilities have different rate case periods that inform evaluation cycles. Additionally, individual Program Administrators may have recently evaluated, or are currently evaluating, certain programs that include LMI customers. These factors will continue to inform each Program Administrator's evaluation priorities and schedule of activities.<sup>110</sup> Given this, the Program Administrators continue to work on non-program specific activities that will be able to provide meaningful insights across the State. As discussed earlier, this may include coordinated baseline studies with longitudinal updates. This may also include research to assist in identification of LMI buildings and customers to better serve these customers and communities, research around non-energy benefits, such as household safety and comfort, and other process evaluation activities.

VGS-compliant impact evaluation activities for programs that span all or many Program Administrators will also continue to be prioritized in the short term.

Where one Program Administrator is implementing a program on behalf of other Program Administrators, as in the case of EmPower+, the implementing Program Administrator takes primary ownership of evaluation activities, including the development process for VGS Specifications, and results from the administrator's evaluation will continue to be used in the reporting of savings achieved. In the case of AMEEP, where Program Administrators are jointly operating the program using a statewide framework, the Program Administrators are collaborating to perform a statewide evaluation. Program-specific realization rates are used, where available, until an evaluation of the new statewide offerings can be completed. This coordination will continue to be conducted as part of larger implementation arrangements at a program level and will be refined throughout 2024 and 2025.

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<sup>110</sup> Further discussion of programmatic evaluation frequency can be found in Clean Energy Guidance CE:08, *Gross Savings Verification Guidance* ("CE-08"). This guidance provides options for scheduling evaluation (Gross Savings Analysis) work, and states that "a PA may use evaluation results conducted on a program's performance within the preceding five-year period, if the program has not significantly changed and the evaluation results calculated a realization rate consistent with this guidance." CE-08, p. 9.

*Implementation Milestones (2024-2025)*

Year	Milestone	Status
2024	<ul style="list-style-type: none"><li>• Develop workplan, select EM&amp;V vendor, and conduct statewide evaluation for AMEEP, as initiated in 2023</li><li>• Continue to develop and implement average existing condition baselines, facilitated through the TRM Management Committee, and identify key LMI measures for further research</li><li>• Begin EmPower+ evaluation process</li></ul>	In Progress
2025	<ul style="list-style-type: none"><li>• Complete statewide evaluation for AMEEP and, as needed, begin to coordinate across PAs on program changes based on recommendations</li><li>• Update EmPower+ VGS</li></ul>	In Progress

## Appendix A: Budgets by Sector<sup>111</sup>

### A.1 Portfolio-Level Budgets by Sector (\$000)

Initiative	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Existing 1-4 Family Homes	53,970	73,892	96,328	44,778	37,885	56,961	314	-	-	-	-	364,128
Existing Affordable Multifamily Programs	17,732	24,819	34,243	56,862	120,889	94,587	36,609	45,110	7,959	3,075	-	441,884
Affordable New Construction	5,034	6,617	17,763	18,887	23,898	17,475	12,800	15,338	14,300	11,087	2,120	145,319
Customer Awareness, Outreach & Engagement	3,225	1,029	5,074	8,580	16,534	28,721	13,296	-	-	-	-	76,459
Pilots and Demonstrations	-	-	469	277	107	-	-	-	-	-	-	853
Beneficial Electrification	13	3,845	2,203	1,806	615	3,137	7,488	5,643	5,250	-	-	30,000
LMI Solar	1,283	895	837	1,229	1,348	1,300	1,280	1,158	1,112	1,100	-	11,541
Healthy Homes Pilot	921	285	530	633	889	998	-	-	-	-	-	4,256
Portfolio Administration	284	1,304	2,404	1,130	1,867	1,969	-	-	-	-	-	8,958
Portfolio EM&V	509	672	967	766	2,400	2,572	-	-	-	-	-	7,884
<b>Total</b>	<b>82,969</b>	<b>113,358</b>	<b>160,817</b>	<b>134,948</b>	<b>206,430</b>	<b>207,720</b>	<b>71,787</b>	<b>67,249</b>	<b>28,621</b>	<b>15,262</b>	<b>2,120</b>	<b>1,091,281</b>

<sup>111</sup> In general, marketing costs are included in the Portfolio Administration category of budgets in this Plan. For NYSEG RG&E, NYSERDA, and National Grid marketing costs are included in program implementation costs.

## A.2 Portfolio Budgets Summary by Sector (\$000)

Initiative	Total	Percentage of Portfolio
Existing 1-4 Family Homes	364,128	33%
Existing Affordable Multifamily Programs (including Multifamily-related New Construction)	572,671	52%
Affordable New Construction (non-Multifamily)	14,532	1%
Customer Awareness, Outreach & Engagement	76,459	7%
Pilots and Demonstrations	853	0%
Beneficial Electrification	30,000	3%
LMI Solar	11,541	1%
Healthy Homes Pilot	4,256	0%
Portfolio Administration	8,958	1%
Portfolio EM&V	7,884	1%
<b>Total</b>	<b>1,091,281</b>	

### A.3 Utility Incremental LMI NE: NY Funding Allocated to Existing Affordable Multifamily Buildings

The Accelerated Efficiency Order directed that at a minimum, 40% of the collective incremental LMI funding be committed to serving affordable multifamily buildings. The funding in this table represents the allocated utility incremental LMI funding from the Accelerated Efficiency Order and the 2020 NE: NY Order. This funding does not include additional utility funding that will be transferred into the Statewide LMI Portfolio from Central Hudson, NFGDC, National Grid (KEDLI), NYSEG, and RG&E (refer to Section 3 and Appendix A Table 4 for details regarding additional funding).

2020 - 2025	
Incremental LMI NE: NY Funding allocated to Affordable Multifamily	\$260,059,060
Total Incremental LMI NE: NY Funding	\$308,357,232
Percentage of Incremental LMI NE: NY Funding allocated to Affordable Multifamily	84%

#### A.4 Additional or Redirected Funds

KEDNY, NYSEG RG&E, and NYSERDA do not plan to incorporate additional funding or shift funds between electric and gas over the course of the portfolio.

Program Administrator	Amount	Portfolio Transferred From	Portfolio Transferred To	Associated Time Period	Description
Central Hudson	\$64,722	Market Rate NE:NY	LMI	2024-2025	Upon reaching full spend of ordered LMI budget, Market Rate NE: NY funds will be transferred to support Customer Awareness, Outreach, and Education LMI programs.
Con Edison	\$24,581,287	LMI	LMI	2020-2025	Upon achievement of ordered electric targets, remaining LMI NE: NY electric funds will be transferred to gas in support of increased demand for gas efficiency measures.
Con Edison	\$72,221,893	Non-LMI	LMI	2024-2025	Funds from the non-LMI portfolio were transferred to the LMI portfolio to support expanding the multifamily budget for gas efficiency measures.
National Grid (KEDLI)	\$10,000,000	Rate Case Funding: Case 19-G-0310	LMI	2020-2023	Rate case funding has been designated to support the KEDLI HEAT program in the 1-4 Family Homes portfolio for program years 2020-2023. Additional Dth savings target has been added to the KEDLI LMI portfolio in concert with this rate case funding.
National Grid (KEDLI)	\$5,000,000	Rate Case Funding: Case 23-G-0226	LMI	2024-2025	Rate case funding has been designated to support the KEDLI HEAT program in the 1-4 Family Homes portfolio for program years 2020-2023. Additional Dth savings target has been added to the KEDLI LMI portfolio in concert with this rate case funding.
National Grid (NMPC)	\$2,000,000	Market Rate NIMO E	LMI NIMO E	2024-2025	Additional funds to support growing pipeline
NFGDC	\$34,622,480	Rate Case Funding: Case 07-G-0141	LMI	2020-2025	LIURP funds directed to LMI 1-4 Family Homes, Multifamily, Portfolio Administration, and EM&V.
Orange & Rockland	\$5,289,871	Market Rate NE: NY	LMI	2024-2025	Market Rate NE: NY funds transferred to LMI to support 1-4 Family Programs.

## Appendix B: Utility LMI Ordered vs Planned Budgets and Benefits<sup>112</sup>

### B.1 Utility Electric LMI Ordered vs Projected Budgets and Targets

Company		2020-2025 Electric Budget	2020-2025 Target (MWh)
Central Hudson	LMI Implementation Plan	976,165	1,395
	NENY Order(s)	910,438	1,579
	Difference	65,727	-184
	Difference (%)	7%	-12%
Con Edison	LMI Implementation Plan	37,068,647	118,611
	NENY Order(s)	61,649,935	106,935
	Difference	-24,581,288	11,676
	Difference (%)	-50%	10%
NMPC	LMI Implementation Plan	12,900,080	32,110
	NENY Order(s)	8,900,079	15,439
	Difference	4,000,001	16,671
	Difference (%)	37%	70%
NYSEG	LMI Implementation Plan	10,263,899	32,313
	NENY Order(s)	10,296,587	17,862
	Difference	-32,688	14,451
	Difference (%)	0%	58%
Orange & Rockland	LMI Implementation Plan	4,122,104	3,765
	NENY Order(s)	2,321,659	4,027
	Difference	1,800,445	-262
	Difference (%)	56%	-7%
RG&E	LMI Implementation Plan	5,664,390	17,214
	NENY Order(s)	5,243,397	9,096
	Difference	420,993	8,118
	Difference (%)	8%	62%

<sup>112</sup> Tables includes 2019 NE: NY ordered budget and targets and additional rate case funding and benefits, as applicable by Program Administrator. NFGDC Implementation Plan projected spend and savings do not account for 2019.



## B.2 Utility Gas LMI Ordered vs Projected Budgets and Targets

Company		2020-2025 Gas Budget	2020-2025 Target (MMBtu)
Central Hudson	LMI Implementation Plan	2,123,352	9,061
	NENY Order(s)	2,124,356	19,667
	Difference	-1,004	-10,606
	Difference (%)	0%	-74%
Con Edison	LMI Implementation Plan	198,586,759	1,501,720
	NENY Order(s)	116,031,327	1,074,165
	Difference	82,555,432	427,555
	Difference (%)	52%	33%
KEDLI	LMI Implementation Plan	35,101,132	126,936
	NENY Order(s), including additional rate case funding and benefits	30,101,131	278,667
	Difference	5,000,001	-151,731
	Difference (%)	15%	-75%
KEDNY	LMI Implementation Plan	24,395,774	229,099
	NENY Order(s)	24,395,776	225,844
	Difference	-2	3,255
	Difference (%)	0%	1%
NFGDC	LMI Implementation Plan	38,378,795	249,640
	NENY Order(s), including additional rate case funding and benefits	42,130,455	307,501
	Difference	-3,751,660	-57,861
	Difference (%)	-9%	-21%
NMPC	LMI Implementation Plan	20,766,852	96,748
	NENY Order(s)	20,766,851	192,251
	Difference	1	-95,503
	Difference (%)	0%	-66%
NYSEG	LMI Implementation Plan	17,357,387	204,140
	NENY Order(s)	18,894,023	174,910
	Difference	-1,536,636	29,230
	Difference (%)	-8%	15%
Orange & Rockland	LMI Implementation Plan	7,201,128	16,153
	NENY Order(s)	3,711,702	34,362
	Difference	3,489,426	-18,209
	Difference (%)	64%	-72%
RG&E	LMI Implementation Plan	9,344,476	144,585
	NENY Order(s)	9,253,656	85,666
	Difference	90,820	58,919
	Difference (%)	1%	51%

### B.3 NYSERDA LMI Budgets and Benefits Targets vs Planned Budgets and Benefits

Metric	LMI Implementation Plan	Target	Difference	Difference (%)
Total Budget* (\$)	\$667,030,437	\$726,066,776	\$28,670,028	4%
MWh Annual Savings	355,349	356,498	-1,149	0%
MMBtu Annual Savings	8,144,554	8,908,710	-764,156	-9%
<p>*NYSEDA currently manages and reports Administration, EM&amp;V, and NYS Cost Recovery Fees at a broader Clean Energy Fund Market Development Portfolio ("CEF Market Development Portfolio" or "CEF") level. To ensure that LMI expenditures and impact achievements can be assessed comprehensively, DPS has established the following LMI allocations for these costs: Administration + EM&amp;V: 27%; Market Development Cost Recovery Fee: 26%. These allocations increase NYSEDA's total Implementation Plan budget to \$739M.</p>				

## Appendix C: Budgets and Benefits by Program Administrator

### C.1 Central Hudson<sup>113</sup>

The forecasted budgets and benefits below reflect Central Hudson's plan to fully spend the allocated budgets plus additional budget transferred from Central Hudson's Non-LMI Energy Efficiency Portfolio to support LMI customers. However, Central Hudson is not forecasting that it will reach either the electric or gas savings target. The reasons include challenges such as inflationary pressures, material and labor costs, as well as lower participation rates.<sup>114</sup> Additionally, transformation of the lighting market has decreased opportunities for the distribution of LED bulbs through Central Hudson's Community Lighting program, which achieved over half of Central Hudson's ordered electric savings target between 2022 and 2023. Current forecasts are informed by program performance to date and projects visible in the program pipeline. Central Hudson anticipates that the gap between Ordered and projected savings will shrink once the AMEEP program and the Community Weatherization Kit program are evaluated and achieved savings from those programs are added to its projected savings total. Central Hudson will continue to work to expand awareness of and participation in LMI program offerings to achieve increased savings through these programs.

No Incentive or Implementation costs are associated with the Customer Awareness, Outreach & Engagement program in 2022 and 2023 as the cost for the measures distributed through this program in those years were incurred as a bulk purchase before the program was incorporated into the LMI portfolio and the program is implemented by partner organizations. Incentive and Implementation costs are reflected for this program in 2024 for the purchase of additional measures in that year.

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<sup>113</sup> Central Hudson's 2025 planned savings are reported as Gross Savings while prior years are reported as Verified Gross Savings to match Central Hudson's October 2024 SEEP. 2023 and 2024 AMEEP savings and 2024 Customer Awareness, Outreach & Engagement are reported as 0 even though the programs generated savings in these years to reflect Verified Gross Savings of an unevaluated program, consistent with Central Hudson's October 2024 SEEP.

<sup>114</sup> NE: NY Proceeding, Statewide Low- to Moderate-Income Portfolio Implementation Plan, V3 (filed June 28, 2023), pp. xvi-xvii.

Electric Budget Distribution (\$)							
	2020	2021	2022	2023	2024	2025	Total
<b>Existing 1-4 Family Homes</b>							
Incentives & Services			80,954	80,770	239,059	340,127	740,911
Program Implementation			7,206	17,379	19,955	37,799	82,340
<b>Total Budget</b>			<b>88,160</b>	<b>98,149</b>	<b>259,015</b>	<b>377,927</b>	<b>823,251</b>
<b>Existing Affordable Multifamily Buildings</b>							
Incentives & Services					287	2,166	2,453
Program Implementation					79	594	672
<b>Total Budget</b>					<b>365</b>	<b>2,759</b>	<b>3,125</b>
<b>Affordable New Construction</b>							
Incentives & Services							
Program Implementation							
<b>Total Budget</b>							
<b>Customer Awareness, Outreach &amp; Engagement</b>							
Incentives & Services					62,791	40,143	102,934
Program Implementation					9,450	7,200	16,650
<b>Total Budget</b>					<b>72,241</b>	<b>47,343</b>	<b>119,584</b>
Portfolio Administration							
Portfolio EM&V					15,103	15,103	30,206
<b>Total</b>	<b>-</b>	<b>-</b>	<b>88,160</b>	<b>98,149</b>	<b>346,724</b>	<b>443,132</b>	<b>976,165</b>

Gas Budget Distribution (\$)							
	2020	2021	2022	2023	2024	2025	Total
<b>Existing 1-4 Family Homes</b>							
Incentives & Services			217,564	239,957	602,434	693,779	1,753,734
Program Implementation			21,522	45,375	60,064	83,101	210,062
<b>Total Budget</b>			239,086	285,332	662,498	776,880	1,963,796
<b>Existing Affordable Multifamily Buildings</b>							
Incentives & Services				7,500	18,662	37,325	63,487
Program Implementation				730	2,903	5,806	9,439
<b>Total Budget</b>				8,230	21,566	43,131	72,927
<b>Affordable New Construction</b>							
Incentives & Services							
Program Implementation							
<b>Total Budget</b>							
<b>Customer Awareness, Outreach &amp; Engagement</b>							
Incentives & Services					6,977	4,460	11,437
Program Implementation					1,050	1,850	2,900
<b>Total Budget</b>					8,027	6,310	14,337
Portfolio Administration							
Portfolio EM&V					36,146	36,146	72,292
<b>Total</b>	-	-	239,086	293,562	728,236	862,467	2,123,352

Electric Savings Benefit Distribution (MWh)							
	2020	2021	2022	2023	2024	2025	Total
Existing 1-4 Family Homes			50	40	97	256	444
Existing Affordable Multifamily Buildings						5	5
Affordable New Construction							
Customer Awareness, Outreach & Engagement			604	148		194	947
<b>Total</b>	-	-	655	188	97	456	1,395

Gas Savings Benefit Distribution (MMBtu)							
	2020	2021	2022	2023	2024	2025	Total
Existing 1-4 Family Homes			642	529	1,391	2,297	4,859
Existing Affordable Multifamily Buildings						415	415
Affordable New Construction							
Customer Awareness, Outreach & Engagement						3,787	3,787
<b>Total</b>	-	-	642	529	1,391	6,499	9,061

## C.2 Con Edison

Con Edison develops its LMI Budget and Benefit forecast predominately based on the goal of meeting or exceeding savings target and prescribed budget identified by the 2020 NE: NY Order directing utilities to allocate 20% of incremental funds toward LMI energy efficiency programs.

For 2025, Con Edison forecasts a 64% decrease in gas savings and 64% decline in electric savings as compared to 2024. Nevertheless, the Company plans to exceed total ordered energy savings by 11% for electric and 40% for gas at the conclusion of the 2020-2025 NE: NY funding period.<sup>102</sup>

Principally, this budget and benefit forecast reflects the Company's continued strategic shift away from behavioral and lighting programs toward comparatively more expensive measures, such as improving buildings' envelope to facilitate resilient energy savings. While Con Edison expects overall unit cost for existing affordable multifamily projects to increase as the program continues to focus on completing whole building energy retrofits to acquire deeper savings, projected unit cost to administer the Company's broader LMI portfolio under the NE: NY LMI budget is expected to remain consistent with the ordered combined commodities unit cost.

Key portfolio highlights in 2024 include significant growth in building envelope savings and whole building retrofits. For 2025, the Company appropriately adjusted projected savings and budget in preparation for the conclusion of the current NE: NY funding period. Given this context, the Company decided to conclude all behavioral programs in Q4 of 2024. These programs include Smart Kids, Retail Lighting, and Efficiency Starter. Ending these programs prior to 2025 drove what would have been projected savings in 2025 into 2024. Once the Company meets its electric target, remaining funds will shift in support of gas efficiency projects. Additionally, in 2024, the Company transferred funds from its non-LMI portfolio to the LMI portfolio in support of roof insulation and other gas efficiency projects anticipated in 2025.

Electric Budget Distribution (\$)							
	2020	2021	2022	2023	2024	2025	Total
<b>Existing 1-4 Family Homes</b>							
Incentives & Services			468,000		343,200	468,000	1,279,200
Program Implementation			60,000		44,000	60,000	164,000
<b>Total Budget</b>			<b>528,000</b>		<b>387,200</b>	<b>528,000</b>	<b>1,443,200</b>
<b>Existing Affordable Multifamily Buildings</b>							
Incentives & Services	3,187,222	2,278,778	3,463,211	2,143,736	7,420,560	6,181,091	24,674,597
Program Implementation	461,956	538,642	320,810	414,101	406,587	338,674	2,480,769
<b>Total Budget</b>	<b>3,649,178</b>	<b>2,817,420</b>	<b>3,784,021</b>	<b>2,557,836</b>	<b>7,827,147</b>	<b>6,519,765</b>	<b>27,155,367</b>
<b>Affordable New Construction</b>							
Incentives & Services							
Program Implementation							
<b>Total Budget</b>							
<b>Customer Awareness, Outreach &amp; Engagement</b>							
Incentives & Services	1,130,560	17,086	367,131	576,435	1,293,480		3,384,691
Program Implementation	1,097,967	166,459	307,512	394,655	220,418		2,187,012
<b>Total Budget</b>	<b>2,228,527</b>	<b>183,545</b>	<b>674,643</b>	<b>971,090</b>	<b>1,513,897</b>		<b>5,571,703</b>
Portfolio Administration	176,444	548,113	546,757	91,108	133,751	133,751	1,629,923
Portfolio EM&V	318,925	190,634	109,303	165,035	242,279	242,279	1,268,454
<b>Total</b>	<b>6,373,073</b>	<b>3,739,712</b>	<b>5,642,724</b>	<b>3,785,068</b>	<b>10,104,275</b>	<b>7,423,796</b>	<b>37,068,647</b>

Gas Budget Distribution (\$)							
	2020	2021	2022	2023	2024	2025	Total
<b>Existing 1-4 Family Homes</b>							
Incentives & Services			1,535,625		1,066,407	1,333,008	3,935,040
Program Implementation			196,875		136,719	170,898	504,492
<b>Total Budget</b>			<b>1,732,500</b>		<b>1,203,125</b>	<b>1,503,906</b>	<b>4,439,532</b>
<b>Existing Affordable Multifamily Buildings</b>							
Incentives & Services	3,066,284	10,816,538	18,155,625	31,751,665	72,700,545	31,863,204	168,353,861
Program Implementation	865,848	2,808,057	2,881,906	3,146,875	5,018,988	2,199,723	16,921,398
<b>Total Budget</b>	<b>3,932,132</b>	<b>13,624,595</b>	<b>21,037,531</b>	<b>34,898,540</b>	<b>77,719,533</b>	<b>34,062,927</b>	<b>185,275,259</b>
<b>Affordable New Construction</b>							
Incentives & Services							
Program Implementation							
<b>Total Budget</b>							
<b>Customer Awareness, Outreach &amp; Engagement</b>							
Incentives & Services	326,144	9,669	21,527	447,898	637,589		1,442,828
Program Implementation	474,685	6,314	15,733	130,454	212,922		840,107
<b>Total Budget</b>	<b>800,829</b>	<b>15,983</b>	<b>37,260</b>	<b>578,353</b>	<b>850,511</b>		<b>2,282,935</b>
Portfolio Administration	86,956	659,503	965,463	263,207	483,500	483,500	2,942,128
Portfolio EM&V	181,514	480,953	525,214	526,160	966,532	966,532	3,646,905
<b>Total</b>	<b>5,001,431</b>	<b>14,781,034</b>	<b>24,297,968</b>	<b>36,266,260</b>	<b>81,223,201</b>	<b>37,016,865</b>	<b>198,586,759</b>

Electric Savings Benefit Distribution (MWh)							
	2020	2021	2022	2023	2024	2025	Total
Existing 1-4 Family Homes			119	105	155	211	590
Existing Affordable Multifamily Buildings	3,937	3,831	3,081	4,837	6,856	6,789	29,331
Affordable New Construction							
Customer Awareness, Outreach & Engagement	35,612	9,400	10,451	20,743	12,482		88,689
<b>Total</b>	<b>39,549</b>	<b>13,232</b>	<b>13,652</b>	<b>25,685</b>	<b>19,493</b>	<b>7,000</b>	<b>118,611</b>

Gas Savings Benefit Distribution (MMBtu)							
	2020	2021	2022	2023	2024	2025	Total
Existing 1-4 Family Homes			2,253	4,106	4,483	5,600	16,441
Existing Affordable Multifamily Buildings	62,350	202,170	303,363	309,228	314,518	205,292	1,396,921
Affordable New Construction							
Customer Awareness, Outreach & Engagement	35,208	865	4,887	21,112	26,285		88,357
<b>Total</b>	<b>97,558</b>	<b>203,034</b>	<b>310,503</b>	<b>334,446</b>	<b>345,286</b>	<b>210,892</b>	<b>1,501,720</b>



### C.3 KEDLI

The forecasted budgets and benefits below are based on the Company's plan to fully spend the allocated budgets to support KEDLI LMI customers. The budget presented in the below table is different from the funding allocated in the 2020 NE: NY Order because additional funding and energy savings targets have been added to the portfolio, as approved in KEDLI's most recent rate case, to support the HEAT program, as represented in previously in Appendix A.4. Previously, the HEAT program was funded solely through the Company's rate cases, but to better align with statewide efforts, is now incorporated into the Statewide LMI Portfolio.

Although the below plan demonstrates that the allocated budget will be spent by the end of 2025, between the programs currently existing in the market, planned modifications, and upcoming initiatives, KEDLI is not currently forecasting that it will reach the ordered energy savings (MMBtu) target. Challenges such as supply chain, inflationary pressures, material and labor costs, as well as low participation rates in AMEEP contribute to this energy savings shortfall.<sup>115</sup> These forecasts reflect what the Company views as most realistic with the timing left in the portfolio. Throughout this portfolio, efforts have been taken to increase participation in these programs, such as KEDLI HEAT's 2022 addition to serve moderate-income customers, expanded marketing efforts, and AMEEP's limited time incentive offerings.

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<sup>115</sup> NE: NY Proceeding, Statewide Low- to Moderate-Income Portfolio Implementation Plan, V3 (filed June 28, 2023), pp. xvi-xvii.

Gas Budget Distribution (\$)							
	2020	2021	2022	2023	2024	2025	Total
<b>Existing 1-4 Family Homes</b>							
Incentives & Services	1,152,184	1,044,955	3,279,701	5,963,087	8,405,359	6,418,852	26,264,138
Program Implementation	378,391	360,136	570,825	889,467	1,567,867	1,388,282	5,154,968
<b>Total Budget</b>	<b>1,530,575</b>	<b>1,405,091</b>	<b>3,850,526</b>	<b>6,852,554</b>	<b>9,973,226</b>	<b>7,807,134</b>	<b>31,419,106</b>
<b>Existing Affordable Multifamily Buildings</b>							
Incentives & Services				79,040	500,000	1,500,000	2,079,040
Program Implementation					169,278	242,998	412,276
<b>Total Budget</b>				<b>79,040</b>	<b>669,278</b>	<b>1,742,998</b>	<b>2,491,316</b>
<b>Affordable New Construction</b>							
Incentives & Services							
Program Implementation							
<b>Total Budget</b>							
<b>Customer Awareness, Outreach &amp; Engagement</b>							
Incentives & Services				125,896	198,892		324,788
Program Implementation			70,719	135,074	267,604	27,651	501,048
<b>Total Budget</b>			<b>70,719</b>	<b>260,970</b>	<b>466,496</b>	<b>27,651</b>	<b>825,836</b>
Portfolio Administration	20,364	4,921	1,113	1,222	1,000	1,000	29,620
Portfolio EM&V	8,109			29	163,558	163,558	335,254
<b>Total</b>	<b>1,559,048</b>	<b>1,410,012</b>	<b>3,922,358</b>	<b>7,193,815</b>	<b>11,273,558</b>	<b>9,742,341</b>	<b>35,101,132</b>

Gas Savings Benefit Distribution (MMBtu)							
	2020	2021	2022	2023	2024	2025	Total
Existing 1-4 Family Homes	3,549	7,749	20,233	20,201	32,351	25,675	109,757
Existing Affordable Multifamily Buildings				623	3,983	10,862	15,468
Affordable New Construction							
Customer Awareness, Outreach & Engagement				812	899		1,711
<b>Total</b>	<b>3,549</b>	<b>7,749</b>	<b>20,233</b>	<b>21,636</b>	<b>37,233</b>	<b>36,537</b>	<b>126,936</b>

#### C.4 KEDNY

The forecasted budgets and benefits below are based on the Company's plan to fully spend the allocated budgets to support KEDNY LMI customers. By spending the full budget, the KEDNY LMI Portfolio is also expecting to reach the ordered energy savings (MMBtu) targets. AMEEP saw some a slow program ramp up in 2021 and 2022 but through 2023 and 2024 the pipeline and projects that have been completed have grown significantly. Since AMEEP's inception the quantity of projects paid out, and therefore incentives paid and energy savings claimed, has doubled year over year. The 2025 program year is expected to see a similar trend with most of the comprehensive projects KEDNY has seen in the pipeline to date completing in 2025. Because of this rate of growth in AMEEP's pipeline, the Company re-allocated funds originally planned for the 1-4 Family Homes program in 2025 to the Existing Affordable Multifamily program's 2025 budget. This re-allocation will enable AMEEP to continue committing new 2025 projects.

Gas Budget Distribution (\$)							
	2020	2021	2022	2023	2024	2025	Total
<b>Existing 1-4 Family Homes</b>							
Incentives & Services			900,001	399,191	165,000		1,464,192
Program Implementation			84,616	8,120	46,154		138,890
<b>Total Budget</b>			<b>984,617</b>	<b>407,311</b>	<b>211,154</b>		<b>1,603,082</b>
<b>Existing Affordable Multifamily Buildings</b>							
Incentives & Services			340,886	2,771,117	8,135,856	6,539,838	17,787,697
Program Implementation				146,406	1,647,855	2,585,980	4,380,241
<b>Total Budget</b>			<b>340,886</b>	<b>2,917,523</b>	<b>9,783,711</b>	<b>9,125,818</b>	<b>22,167,938</b>
<b>Affordable New Construction</b>							
Incentives & Services							
Program Implementation							
<b>Total Budget</b>							
<b>Customer Awareness, Outreach &amp; Engagement</b>							
Incentives & Services							
Program Implementation			83,815	48,058	44,416	32,771	209,060
<b>Total Budget</b>			<b>83,815</b>	<b>48,058</b>	<b>44,416</b>	<b>32,771</b>	<b>209,060</b>
Portfolio Administration			84,616		19,038		103,654
Portfolio EM&V			84,616	34	116,868	110,522	312,040
<b>Total</b>	-	-	<b>1,578,550</b>	<b>3,372,926</b>	<b>10,175,187</b>	<b>9,269,111</b>	<b>24,395,774</b>

  

Gas Savings Benefit Distribution (MMBtu)							
	2020	2021	2022	2023	2024	2025	Total
Existing 1-4 Family Homes			3,720	1,884	712		6,316
Existing Affordable Multifamily Buildings			3,360	29,914	61,100	128,409	222,783
Affordable New Construction							
Customer Awareness, Outreach & Engagement							
<b>Total</b>	-	-	<b>7,080</b>	<b>31,798</b>	<b>61,812</b>	<b>128,409</b>	<b>229,099</b>

## C.5 National Fuel Gas

The reported benefits and budgets outlined below are based on National Fuel's intent to fully utilize the approved funding allocated to support LMI customers. However, National Fuel is anticipating that the Company may fall short of the targeted savings goals. This projected shortfall can be attributed, in part, to a lack of sufficient participation, particularly in the AMEEP program. The Company will continue to promote both the 1-4 Family EmPower+ and AMEEP programs to encourage greater participation among eligible customers to strive towards achieving the targeted savings goals.

Gas Budget Distribution (\$)							
	2020	2021	2022	2023	2024	2025	Total
<b>Existing 1-4 Family Homes</b>							
Incentives & Services	4,563,489	3,537,952	8,660,293	4,909,502	4,713,904	4,737,277	31,122,417
Program Implementation		368,180	349,163	1,066,501	872,295	875,292	3,531,431
<b>Total Budget</b>	<b>4,563,489</b>	<b>3,906,132</b>	<b>9,009,456</b>	<b>5,976,003</b>	<b>5,586,200</b>	<b>5,612,569</b>	<b>34,653,849</b>
<b>Existing Affordable Multifamily Buildings</b>							
Incentives & Services				4,689	502,378	568,953	1,076,020
Program Implementation			3,600	25,252	128,033	146,726	303,611
<b>Total Budget</b>			<b>3,600</b>	<b>29,941</b>	<b>630,411</b>	<b>715,679</b>	<b>1,379,631</b>
<b>Affordable New Construction</b>							
Incentives & Services							
Program Implementation							
<b>Total Budget</b>							
<b>Customer Awareness, Outreach &amp; Engagement</b>							
Incentives & Services							
Program Implementation							
<b>Total Budget</b>							
Portfolio Administration			377,236	543,081	531,040	549,683	2,001,039
Portfolio EM&V					171,689	172,588	344,276
<b>Total</b>	<b>4,563,489</b>	<b>3,906,132</b>	<b>9,390,292</b>	<b>6,549,025</b>	<b>6,919,339</b>	<b>7,050,518</b>	<b>38,378,795</b>

Gas Savings Benefit Distribution (MMBtu)							
	2020	2021	2022	2023	2024	2025	Total
Existing 1-4 Family Homes	31,411	21,968	47,420	25,234	50,789	55,526	232,348
Existing Affordable Multifamily Buildings				161	8,264	8,867	17,292
Affordable New Construction							
Customer Awareness, Outreach & Engagement							
<b>Total</b>	<b>31,411</b>	<b>21,968</b>	<b>47,420</b>	<b>25,395</b>	<b>59,053</b>	<b>64,393</b>	<b>249,640</b>

## C.6 New York State Energy Research & Development Authority

As part of the Performance Management & Improvement Process established by DPS, NYSERDA revises the forecast of all CEF initiatives in the Compiled Investment Plans (CIP) November 1 filing annually (the reforecast). Each initiative's budget and benefit values have been updated to reflect NYSERDA's best understanding at this time, including actual progress reported for past years alongside adjustments to future year projections where necessary.<sup>116</sup>

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<sup>116</sup> <https://www.nyserda.ny.gov/About/Funding/Clean-Energy-Fund>

## C.6.1 CEF Budget Expenditures

CEF Budget Distribution (\$000)												
	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
<b>Existing 1-4 Family Homes</b>												
Incentives and Services	40,581	59,449	63,329	15,998	3,253	21,724						204,333
Implementation	6,560	7,356	8,717	6,642	1,002	2,140	284					32,701
Business Support			49	265	35							350
Tools, Training and Replication		8	20	14	200	200	30					473
Research and Technology Studies												
<b>Total Budget</b>	<b>47,141</b>	<b>66,813</b>	<b>72,115</b>	<b>22,920</b>	<b>4,491</b>	<b>24,063</b>	<b>314</b>					<b>237,857</b>
<b>Existing Affordable Multifamily Buildings</b>												
Incentives and Services	7,011	5,513	6,675	11,583	11,030	27,256	31,413	40,838	6,265	2,922		150,507
Implementation	2,317	2,045	1,447	1,478	1,739	2,161	1,504	1,998	658	153		15,499
Tools, Training and Replication	44	492	569	796	2,785	4,124	3,692	2,274	1,036			15,812
Research and Technology Studies			6	53	70							129
<b>Total Budget</b>	<b>9,372</b>	<b>8,049</b>	<b>8,697</b>	<b>13,910</b>	<b>15,625</b>	<b>33,542</b>	<b>36,609</b>	<b>45,110</b>	<b>7,959</b>	<b>3,075</b>		<b>181,948</b>
<b>Affordable New Construction</b>												
Incentives and Services	4,097	5,455	16,549	17,366	24,017	16,192	11,618	14,375	13,250	10,075	1,200	134,193
Implementation	726	773	754	679	480	858	757	650	700	663	595	7,635
Tools, Training and Replication	211	389	460	842	(599)	425	425	313	350	350	326	3,492
<b>Total Budget</b>	<b>5,034</b>	<b>6,617</b>	<b>17,763</b>	<b>18,887</b>	<b>23,898</b>	<b>17,475</b>	<b>12,800</b>	<b>15,338</b>	<b>14,300</b>	<b>11,087</b>	<b>2,120</b>	<b>145,319</b>
<b>Customer Awareness, Outreach &amp; Engagement</b>												
Incentives and Services	156	471	378	89	239	542	127					2,001
Implementation	15	304	662	696	2,246	6,224	3,909					14,054
Tools, Training and Replication	25	55	1,624	3,750	7,988	16,500	9,260					39,202
<b>Total Budget</b>	<b>195</b>	<b>829</b>	<b>2,664</b>	<b>4,534</b>	<b>10,473</b>	<b>23,266</b>	<b>13,296</b>					<b>55,257</b>
<b>Pilots and Demonstrations</b>												
Implementation			469	277	107							853
<b>Total Budget</b>			<b>469</b>	<b>277</b>	<b>107</b>							<b>853</b>
<b>LMI Solar</b>												
Incentives and Services	1,093	821	812	1,203	1,248	1,200	1,193	1,158	1,112	1,100		10,940
Implementation	189	74	25	26	100	100	87					601
<b>Total Budget</b>	<b>1,283</b>	<b>895</b>	<b>837</b>	<b>1,229</b>	<b>1,348</b>	<b>1,300</b>	<b>1,280</b>	<b>1,158</b>	<b>1,112</b>	<b>1,100</b>		<b>11,541</b>
<b>Electrification</b>												
Incentives and Services		3,043	1,850	1,223	359	2,180	6,750	5,000	5,250			25,655
Implementation	13	789	313	572	256	369	419	412				3,143
Tools, Training and Replication		13	40	11	1	(12)						52
Research and Technology Studies						600	319	231				1,150
<b>Total Budget</b>	<b>13</b>	<b>3,845</b>	<b>2,203</b>	<b>1,806</b>	<b>615</b>	<b>3,137</b>	<b>7,488</b>	<b>5,643</b>	<b>5,250</b>			<b>30,000</b>
<b>Heathly Homes VBP</b>												
Incentives and Services		4	20	98	120							242
Implementation	56	81	11	27	3	4						182
Research and Technology Studies	865	200	498	509	766	994						3,832
<b>Total Budget</b>	<b>921</b>	<b>285</b>	<b>530</b>	<b>633</b>	<b>889</b>	<b>998</b>						<b>4,256</b>
<b>Total Portfolio Budget</b>	<b>63,959</b>	<b>87,334</b>	<b>105,277</b>	<b>64,196</b>	<b>57,444</b>	<b>103,780</b>	<b>71,787</b>	<b>67,249</b>	<b>28,621</b>	<b>15,262</b>	<b>2,120</b>	<b>667,030</b>



## C.6.2 Electric Savings

Electric Savings Benefits Distribution (MWh)												
	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Existing 1-4 Family Homes	2,214	4,285	4,092	1,219	152	781						12,744
Existing Affordable Multifamily Buildings	2,698	8,281	7,997	5,666	2,786	5,722	7,023	14,991	4,343	1,132		60,639
Affordable New Construction	2,346	3,717	8,192	4,810	4,010	8,745	13,075	14,550	16,328	11,186	3,929	90,887
Customer Awareness, Outreach & Engagement Pilots and Demonstrations Heathly Homes VBP		0	1	7	90	81						180
<b>Total</b>	<b>7,258</b>	<b>16,284</b>	<b>20,282</b>	<b>11,702</b>	<b>7,038</b>	<b>15,329</b>	<b>20,098</b>	<b>29,541</b>	<b>20,671</b>	<b>12,318</b>	<b>3,929</b>	<b>164,449</b>

## C.6.3 Gas Savings

Gas Savings Benefits Distribution (MMBtu)												
	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Existing 1-4 Family Homes	96,509	149,741	140,027	39,708	8,210	25,861						460,056
Existing Affordable Multifamily Buildings	27,459	36,477	15,912	135,750	52,299	294,100	173,818	697,709	413,832	226,529		2,073,883
Affordable New Construction	18,773	36,222	81,453	40,880	24,472	80,738	101,688	99,000	102,928	65,536	30,179	681,869
Customer Awareness, Outreach & Engagement Pilots and Demonstrations Heathly Homes VBP			0	3	2,460	2,214						4,678
<b>Total</b>	<b>142,740</b>	<b>222,441</b>	<b>237,392</b>	<b>216,341</b>	<b>87,441</b>	<b>402,912</b>	<b>275,506</b>	<b>796,709</b>	<b>516,760</b>	<b>292,065</b>	<b>30,179</b>	<b>3,220,485</b>

## C.6.4 Other Fuels Saving

Other Fuels Distribution (MMBtu)												
	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Existing 1-4 Family Homes	52,785	74,236	74,575	21,801	2,829	12,722						238,947
Existing Affordable Multifamily Buildings	279	1,897	35,445	7,139	7,354	52,089	166,783	237,385	138,179	69,829		716,377
Affordable New Construction	1,945			525	90	263	563	1,750	2,785	1,607	536	10,064
Customer Awareness, Outreach & Engagement Pilots and Demonstrations Heathly Homes VBP			1	37	540	486						1,064
<b>Total</b>	<b>55,009</b>	<b>76,133</b>	<b>110,021</b>	<b>29,502</b>	<b>10,812</b>	<b>65,559</b>	<b>167,346</b>	<b>239,135</b>	<b>140,964</b>	<b>71,436</b>	<b>536</b>	<b>966,452</b>

### C.6.5 Indirect Electric Savings

Indirect Electric Savings Benefits Distribution (MWh)*												
	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Existing Affordable Multifamily Buildings			929	3,092	4,020	4,632	6,986	6,096	5,225	5,116	4,870	40,963
Affordable New Construction		121,917	1,553	1,553	1,553	1,553	1,553	1,553	1,553	1,553	1,553	135,890
Healthy Homes VBP	96								1,214		12,737	14,047
Total	96	121,917	2,481	4,644	5,573	6,184	8,538	7,648	7,991	6,668	19,159	190,900

### C.6.6 Indirect Gas Savings

Indirect Gas Savings Benefits Distribution (MMBtu)*												
	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Existing Affordable Multifamily Buildings			38,654	120,079	158,732	183,923	235,177	209,978	179,466	203,764	184,796	1,514,567
Affordable New Construction		1,041,234	8,363	8,363	8,363	8,363	8,363	8,363	8,363	8,363	8,363	1,116,497
Healthy Homes VBP	2,560								32,320		340,400	375,280
Total	2,560	1,041,234	47,016	128,441	167,095	192,285	243,539	218,341	220,148	212,126	533,559	3,006,343

### C.6.7 Indirect Other Fuels Savings

Indirect Other Fuels Savings Benefits Distribution (MMBtu)*												
	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Existing Affordable Multifamily Buildings			9,664	36,705	46,369	52,869	107,630	123,065	122,951	183,161	178,830	861,243
Affordable New Construction			387	387	387	387	387	387	387	387	387	3,483
Healthy Homes VBP	640								808		85,100	86,548
<b>Total</b>	<b>640</b>	<b>-</b>	<b>10,051</b>	<b>37,092</b>	<b>46,756</b>	<b>53,256</b>	<b>108,017</b>	<b>123,452</b>	<b>124,146</b>	<b>183,548</b>	<b>264,317</b>	<b>951,274</b>

## C.7 New York State Electric & Gas (NYSEG)

Electric and gas savings plans are projected to exceed ordered saving targets. Although we have seen an increase in program participation for all LMI programs, we are projecting to fall just below the ordered budgets. To Offset the (budget) shortfall, NYSEG will continue to bolster the Customer Awareness, Outreach and Engagement programs. These supplemental programs will cross promote EmPower+ and AMEEP while providing additional savings and investment in our low-income communities. In addition, NYSEG will continue to focus on growing AMEEP participation through heavy outreach efforts.

Electric Budget Distribution (\$)							
	2020	2021	2022	2023	2024	2025	Total
<b>Existing 1-4 Family Homes</b>							
Incentives & Services	382,682	368,025	390,452	704,337	1,197,331	1,636,843	4,679,670
Program Implementation	51,610	38,558	67,013	91,103	13,201	17,582	279,067
Tools, Training, and Replication	2,087	1,987		925	1,929	3,103	10,031
<b>Total Budget</b>	<b>436,379</b>	<b>408,570</b>	<b>457,465</b>	<b>796,365</b>	<b>1,212,461</b>	<b>1,657,528</b>	<b>4,968,768</b>
<b>Existing Affordable Multifamily Buildings</b>							
Incentives & Services	405,309	21,708	73,158	247,535	441,828	302,174	1,491,712
Program Implementation	36,779	39,083	16,795	13,036	14,240	16,782	136,715
Tools, Training, and Replication	1,392	1,324	326	2,099	4,000	4,000	13,141
<b>Total Budget</b>	<b>443,480</b>	<b>62,115</b>	<b>90,279</b>	<b>262,670</b>	<b>460,068</b>	<b>322,956</b>	<b>1,641,568</b>
<b>Affordable New Construction</b>							
Incentives & Services							
Program Implementation							
<b>Total Budget</b>							
<b>Customer Awareness, Outreach &amp; Engagement</b>							
Incentives & Services			358,945	560,151	240,372	970,078	2,129,546
Program Implementation			152,591	265,770	82,036	440,635	941,032
Tools, Training, and Replication			57,674	21,302	3,997	6,107	89,080
<b>Total Budget</b>			<b>569,210</b>	<b>847,223</b>	<b>326,405</b>	<b>1,416,820</b>	<b>3,159,658</b>
Portfolio Administration		24,229	48,545	36,547	32,662	34,013	175,996
Portfolio EM&V			53,069	45,680	91,571	127,589	317,909
<b>Total</b>	<b>879,859</b>	<b>494,914</b>	<b>1,218,568</b>	<b>1,988,485</b>	<b>2,123,167</b>	<b>3,558,906</b>	<b>10,263,899</b>

Gas Budget Distribution (\$)							
	2020	2021	2022	2023	2024	2025	Total
<b>Existing 1-4 Family Homes</b>							
Incentives & Services	46,651	637,378	983,982	2,360,778	2,826,005	3,863,365	10,718,159
Program Implementation	2,165	60,186	139,773	198,437	36,618	50,059	487,238
Tools, Training, and Replication	279	266		5,569	6,462	8,834	21,410
<b>Total Budget</b>	<b>49,095</b>	<b>697,830</b>	<b>1,123,755</b>	<b>2,564,784</b>	<b>2,869,085</b>	<b>3,922,258</b>	<b>11,226,807</b>
<b>Existing Affordable Multifamily Buildings</b>							
Incentives & Services	25,506	3,875	23,863	138,379	453,712	674,412	1,319,747
Program Implementation	3,025	50,227	39,567	30,077	35,000	28,911	186,807
Tools, Training, and Replication	186	177	1,271	1,273	8,200	8,000	19,107
<b>Total Budget</b>	<b>28,717</b>	<b>54,279</b>	<b>64,701</b>	<b>169,729</b>	<b>496,912</b>	<b>711,323</b>	<b>1,525,661</b>
<b>Affordable New Construction</b>							
Incentives & Services							
Program Implementation							
<b>Total Budget</b>							
<b>Customer Awareness, Outreach &amp; Engagement</b>							
Incentives & Services			60,508	199,512	1,369,339	1,941,569	3,570,928
Program Implementation			35,930	70,123	32,757	201,485	340,295
Tools, Training, and Replication				2,643	4,945	6,393	13,981
<b>Total Budget</b>			<b>96,438</b>	<b>272,278</b>	<b>1,407,041</b>	<b>2,149,447</b>	<b>3,925,204</b>
Portfolio Administration		33,332	113,366	126,313	56,857	39,998	369,866
Portfolio EM&V			37,785	220	124,164	147,680	309,849
<b>Total</b>	<b>77,812</b>	<b>785,441</b>	<b>1,436,045</b>	<b>3,133,324</b>	<b>4,954,059</b>	<b>6,970,706</b>	<b>17,357,387</b>

Electric Savings Benefit Distribution (MWh)							
	2020	2021	2022	2023	2024	2025	Total
Existing 1-4 Family Homes	619	355	405	525	547	726	3,177
Existing Affordable Multifamily Buildings	817	44	178	694	2,138	1,227	5,098
Affordable New Construction							
Customer Awareness, Outreach & Engagement			7,328	9,257	920	6,533	24,038
<b>Total</b>	<b>1,436</b>	<b>399</b>	<b>7,911</b>	<b>10,476</b>	<b>3,605</b>	<b>8,486</b>	<b>32,313</b>

Gas Savings Benefit Distribution (MMBtu)							
	2020	2021	2022	2023	2024	2025	Total
Existing 1-4 Family Homes	216	3,579	4,510	10,559	7,864	10,751	37,479
Existing Affordable Multifamily Buildings	672	33	800	2,831	6,925	9,467	20,728
Affordable New Construction							
Customer Awareness, Outreach & Engagement			3,902	37,534	10,498	93,999	145,933
<b>Total</b>	<b>888</b>	<b>3,612</b>	<b>9,212</b>	<b>50,924</b>	<b>25,287</b>	<b>114,217</b>	<b>204,140</b>

## C.8 NMPC

The forecasted electric budgets and benefits below are based off the Company's plan to fully spend the allocated budgets to support NMPC LMI customers. Although there were challenges in ramping up programs, the NMPC LMI electric portfolio is forecasting to overachieve the ordered energy savings (MWh) target and spend the ordered electric portfolio budget, as well as spend an additional \$4 Million that was shifted from the NMPC Market Rate electric portfolio in 2024 and 2025. In mid-2024 it was recognized that the rate at which the pipeline for NMPC Electric AMEEP was growing would surpass the budget available through 2025. The NMPC Market Rate electric portfolio had unspent funds from program year 2022 after achieving the annual energy savings target and thus shifted funding to the NMPC LMI electric portfolio to support AMEEP's electric pipeline growth.

The NMPC LMI Gas portfolio, however, is not forecasted to reach the ordered energy savings (MMBtu) target due to significant challenges in ramping up the AMEEP pipeline for gas projects. Forecasted underspend from AMEEP has been re-allocated into the Existing 1-4 family Homes program, EmPower+, to continue to provide benefit to NMPC LMI Gas customers.

Electric Budget Distribution (\$)							
	2020	2021	2022	2023	2024	2025	Total
<b>Existing 1-4 Family Homes</b>							
Incentives & Services			463,936	541,373	761,516	312,995	2,079,820
Program Implementation			59,277	24,324	97,630	40,128	221,359
<b>Total Budget</b>			<b>523,213</b>	<b>565,697</b>	<b>859,146</b>	<b>353,123</b>	<b>2,301,179</b>
<b>Existing Affordable Multifamily Buildings</b>							
Incentives & Services				367,134	3,234,734	3,450,000	7,051,868
Program Implementation				121,496	849,564	894,615	1,865,675
<b>Total Budget</b>				<b>488,630</b>	<b>4,084,298</b>	<b>4,344,615</b>	<b>8,917,543</b>
<b>Affordable New Construction</b>							
Incentives & Services							
Program Implementation							
<b>Total Budget</b>							
<b>Customer Awareness, Outreach &amp; Engagement</b>							
Incentives & Services			369,870	239,948	450,000	100,000	1,159,818
Program Implementation			31,431	66,208	58,012	62,641	218,292
<b>Total Budget</b>			<b>401,301</b>	<b>306,156</b>	<b>508,012</b>	<b>162,641</b>	<b>1,378,110</b>
Portfolio Administration			53,879		88,367	36,615	178,861
Portfolio EM&V			17,934	44	52,098	54,311	124,387
<b>Total</b>	<b>-</b>	<b>-</b>	<b>996,327</b>	<b>1,360,527</b>	<b>5,591,921</b>	<b>4,951,305</b>	<b>12,900,080</b>

Gas Budget Distribution (\$)							
	2020	2021	2022	2023	2024	2025	Total
<b>Existing 1-4 Family Homes</b>							
Incentives & Services			1,001,802	1,122,822	3,958,500	5,468,390	11,551,514
Program Implementation			94,186	44,924	537,500	731,076	1,407,686
<b>Total Budget</b>			<b>1,095,988</b>	<b>1,167,746</b>	<b>4,496,000</b>	<b>6,199,466</b>	<b>12,959,200</b>
<b>Existing Affordable Multifamily Buildings</b>							
Incentives & Services				124,861	1,400,000	2,000,000	3,524,861
Program Implementation				133,818	1,349,040	605,000	2,087,858
<b>Total Budget</b>				<b>258,680</b>	<b>2,749,040</b>	<b>2,605,000</b>	<b>5,612,720</b>
<b>Affordable New Construction</b>							
Incentives & Services							
Program Implementation							
<b>Total Budget</b>							
<b>Customer Awareness, Outreach &amp; Engagement</b>							
Incentives & Services				-	-	-	
Program Implementation			75,957	43,552	140,252	29,699	289,460
<b>Total Budget</b>			<b>75,957</b>	<b>43,552</b>	<b>140,252</b>	<b>29,699</b>	<b>289,460</b>
Portfolio Administration			94,186		457,150	631,368	1,182,704
Portfolio EM&V			94,186	18	285,246	343,318	722,768
<b>Total</b>	<b>-</b>	<b>-</b>	<b>1,360,317</b>	<b>1,469,996</b>	<b>8,127,688</b>	<b>9,808,851</b>	<b>20,766,852</b>

Electric Savings Benefit Distribution (MWh)							
	2020	2021	2022	2023	2024	2025	Total
Existing 1-4 Family Homes			381	289	511	210	1,391
Existing Affordable Multifamily Buildings				1,528	8,195	8,740	18,463
Affordable New Construction							
Customer Awareness, Outreach & Engagement			7,604	2,202	2,077	373	12,256
<b>Total</b>	<b>-</b>	<b>-</b>	<b>7,985</b>	<b>4,019</b>	<b>10,783</b>	<b>9,323</b>	<b>32,110</b>

Gas Savings Benefit Distribution (MMBtu)							
	2020	2021	2022	2023	2024	2025	Total
Existing 1-4 Family Homes			2,924	4,073	13,046	18,023	38,066
Existing Affordable Multifamily Buildings				2,828	22,999	32,855	58,682
Affordable New Construction							
Customer Awareness, Outreach & Engagement							
<b>Total</b>	<b>-</b>	<b>-</b>	<b>2,924</b>	<b>6,901</b>	<b>36,045</b>	<b>50,878</b>	<b>96,748</b>



## C.9 Orange & Rockland<sup>117</sup>

Forecasted budgets and benefits for O&R are directed towards the goal of fully investing the allocated budgets to support LMI customers. The Company expects the majority of LMI participation to be in the 1-4 Family Homes sector, so therefore 88% of the electric budget and 94% of the gas budget have been allocated towards the EmPower+ NY program. However, due to the high YTD run rate of the EmPower+ program, we are expecting some difficulty in achieving our LMI gas savings target. In addition, the Federal EISA regulations will have further impacts on reducing the energy savings potential per project starting in 2023. Therefore, the Company will look to expand its efforts on its lower cost Customer Awareness, Outreach, and Engagement programs in order to achieve its overall LMI savings targets. These Customer Awareness, Outreach and Engagement initiatives will engage and guide LMI customers to make energy-wise decisions for their homes.

Electric Budget Distribution (\$)							
	2020	2021	2022	2023	2024	2025	Total
<b>Existing 1-4 Family Homes</b>							
Incentives & Services			1,060,000	800,000	1,200,000	600,000	3,660,000
Program Implementation				3,814			3,814
<b>Total Budget</b>			<b>1,060,000</b>	<b>803,814</b>	<b>1,200,000</b>	<b>600,000</b>	<b>3,663,814</b>
<b>Existing Affordable Multifamily Buildings</b>							
Incentives & Services					20,000	20,000	40,000
Program Implementation					5,000	5,000	10,000
<b>Total Budget</b>					<b>25,000</b>	<b>25,000</b>	<b>50,000</b>
<b>Affordable New Construction</b>							
Incentives & Services							
Program Implementation							
<b>Total Budget</b>							
<b>Customer Awareness, Outreach &amp; Engagement</b>							
Incentives & Services			59,169	71,587	45,000	45,000	220,756
Program Implementation			16,490	13,871	21,205	21,206	72,772
<b>Total Budget</b>			<b>75,659</b>	<b>85,458</b>	<b>66,205</b>	<b>66,206</b>	<b>293,528</b>
Portfolio Administration			19,437	6,286	15,000	15,000	55,723
Portfolio EM&V				1,539	17,500	40,000	59,039
<b>Total</b>	-	-	<b>1,155,096</b>	<b>897,097</b>	<b>1,323,705</b>	<b>746,206</b>	<b>4,122,104</b>

<sup>117</sup> The Company has transferred a total of \$1.8M from the 2019 - 2023 Unspent NE:NY Electric EE budget to the 2024-2025 LMI Electric budget, and a total of \$3.5M from the 2019 - 2023 Unspent NE:NY Gas EE budget to the 2024 - 2025 LMI Gas budget. Corresponding targets for these years are represented in Tables 4B and 4C. Updated budgets and targets will be reflected in the upcoming November 1, 2024, LMI IP filing.

Gas Budget Distribution (\$)							
	2020	2021	2022	2023	2024	2025	Total
<b>Existing 1-4 Family Homes</b>							
Incentives & Services			2,672,000	616,067	2,500,000	1,000,000	6,788,067
Program Implementation				3,814			3,814
<b>Total Budget</b>			2,672,000	<b>619,881</b>	<b>2,500,000</b>	<b>1,000,000</b>	<b>6,791,881</b>
<b>Existing Affordable Multifamily Buildings</b>							
Incentives & Services				15,000	80,000	80,000	175,000
Program Implementation				3,400	10,000	10,000	23,400
<b>Total Budget</b>				<b>18,400</b>	<b>90,000</b>	<b>90,000</b>	<b>198,400</b>
<b>Affordable New Construction</b>							
Incentives & Services							
Program Implementation							
<b>Total Budget</b>							
<b>Customer Awareness, Outreach &amp; Engagement</b>							
Incentives & Services			330	15,837	43,449	41,963	101,579
Program Implementation			-		10,000	10,000	20,000
<b>Total Budget</b>			<b>330</b>	<b>15,837</b>	<b>53,449</b>	<b>51,963</b>	<b>121,579</b>
Portfolio Administration			9,419	810	10,000	10,000	30,229
Portfolio EM&V				1,539	17,500	40,000	59,039
<b>Total</b>	-	-	<b>2,681,749</b>	<b>656,467</b>	<b>2,670,949</b>	<b>1,191,963</b>	<b>7,201,128</b>

Electric Savings Benefit Distribution (MWh)							
	2020	2021	2022	2023	2024	2025	Total
Existing 1-4 Family Homes			160	212	310	350	1,032
Existing Affordable Multifamily Buildings						30	30
Affordable New Construction							
Customer Awareness, Outreach & Engagement			1,302	1,028	187	186	2,703
<b>Total</b>	-	-	<b>1,462</b>	<b>1,240</b>	<b>497</b>	<b>566</b>	<b>3,765</b>

Gas Savings Benefit Distribution (MMBtu)							
	2020	2021	2022	2023	2024	2025	Total
Existing 1-4 Family Homes			2,688	3,459	3,615	2,600	12,362
Existing Affordable Multifamily Buildings				170	900	1,200	2,270
Affordable New Construction							-
Customer Awareness, Outreach & Engagement				621	300	600	1,521
<b>Total</b>	-	-	<b>2,688</b>	<b>4,250</b>	<b>4,815</b>	<b>4,400</b>	<b>16,153</b>

## C.10 Rochester Gas & Electric (RG&E)

Electric and gas plans are projected to exceed the ordered saving targets and ordered budgets. We will continue to bolster our Customer Awareness, Outreach and Engagement. These supplemental programs will cross promote EmPower+ and AMEEP while providing additional savings and investment in our low-income communities.

Electric Budget Distribution (\$)							
	2020	2021	2022	2023	2024	2025	Total
<b>Existing 1-4 Family Homes</b>							
Incentives & Services	199,277	227,407	189,237	374,952	579,248	750,652	2,320,773
Program Implementation	27,270	25,639	40,453	45,969	6,222	8,062	153,615
Tools, Training, and Replication	1,559	1,499		913	1,098	1,423	6,492
<b>Total Budget</b>	<b>228,106</b>	<b>254,545</b>	<b>229,690</b>	<b>421,834</b>	<b>586,568</b>	<b>760,137</b>	<b>2,480,880</b>
<b>Existing Affordable Multifamily Buildings</b>							
Incentives & Services	256,456	73,013	100,359	178,178	208,162	277,341	1,093,509
Program Implementation	18,180	38,041	9,293	7,128	5,059	5,448	83,149
Tools, Training, and Replication	1,040	999		1,451	5,500	5,500	14,490
<b>Total Budget</b>	<b>275,676</b>	<b>112,053</b>	<b>109,652</b>	<b>186,757</b>	<b>218,721</b>	<b>288,289</b>	<b>1,191,148</b>
<b>Affordable New Construction</b>							
Incentives & Services							
Program Implementation							
<b>Total Budget</b>							
<b>Customer Awareness, Outreach &amp; Engagement</b>							
Incentives & Services			181,042	287,518	120,776	574,476	1,163,812
Program Implementation			57,430	143,175	38,665	293,620	532,890
Tools, Training, and Replication			38,431	14,594	2,153	2,197	57,375
<b>Total Budget</b>			<b>276,903</b>	<b>445,287</b>	<b>161,594</b>	<b>870,293</b>	<b>1,754,077</b>
Portfolio Administration		15,181	27,397	20,104	16,184	15,760	94,626
Portfolio EM&V			24,045	25,320	44,084	50,210	143,659
<b>Total</b>	<b>503,782</b>	<b>381,779</b>	<b>667,687</b>	<b>1,099,302</b>	<b>1,027,151</b>	<b>1,984,689</b>	<b>5,664,390</b>

Gas Budget Distribution (\$)							
	2020	2021	2022	2023	2024	2025	Total
<b>Existing 1-4 Family Homes</b>							
Incentives & Services	19,183	370,104	538,548	1,185,653	1,367,172	1,771,724	5,252,384
Program Implementation	1,775	36,417	80,566	108,757	17,715	22,957	268,187
Tools, Training, and Replication	105	100		4,147	3,126	4,051	11,529
<b>Total Budget</b>	<b>21,063</b>	<b>406,621</b>	<b>619,114</b>	<b>1,298,557</b>	<b>1,388,013</b>	<b>1,798,732</b>	<b>5,532,100</b>
<b>Existing Affordable Multifamily Buildings</b>							
Incentives & Services	29,846	57,516	91,315	1,057,343	463,772	420,071	2,119,863
Program Implementation	1,183	41,789	23,562	16,506	21,000	21,381	125,421
Tools, Training, and Replication	70	67		1,642	3,000	3,500	8,279
<b>Total Budget</b>	<b>31,099</b>	<b>99,372</b>	<b>114,877</b>	<b>1,075,491</b>	<b>487,772</b>	<b>444,952</b>	<b>2,253,563</b>
<b>Affordable New Construction</b>							
Incentives & Services							
Program Implementation							
<b>Total Budget</b>							
<b>Customer Awareness, Outreach &amp; Engagement</b>							
Incentives & Services			36,269	128,051	426,947	478,382	1,069,649
Program Implementation			11,737	41,759	13,540	113,349	180,385
Tools, Training, and Replication				1,750	2,216	2,575	6,541
<b>Total Budget</b>			<b>48,006</b>	<b>171,560</b>	<b>442,703</b>	<b>594,306</b>	<b>1,256,575</b>
Portfolio Administration		19,121	62,150	41,519	22,759	18,506	164,055
Portfolio EM&V			20,714	68	55,440	61,961	138,183
<b>Total</b>	<b>52,162</b>	<b>525,114</b>	<b>864,861</b>	<b>2,587,195</b>	<b>2,396,687</b>	<b>2,918,457</b>	<b>9,344,476</b>

Electric Savings Benefit Distribution (MWh)							
	2020	2021	2022	2023	2024	2025	Total
Existing 1-4 Family Homes	452	381	284	245	298	333	1,993
Existing Affordable Multifamily Buildings	524	47	428	359	1,474	998	3,830
Affordable New Construction							
Customer Awareness, Outreach & Engagement			3,345	3,644	490	3,912	11,391
<b>Total</b>	<b>976</b>	<b>428</b>	<b>4,057</b>	<b>4,248</b>	<b>2,262</b>	<b>5,243</b>	<b>17,214</b>

Gas Savings Benefit Distribution (MMBtu)							
	2020	2021	2022	2023	2024	2025	Total
Existing 1-4 Family Homes	296	2,143	2,720	5,004	4,097	5,309	19,569
Existing Affordable Multifamily Buildings	673		3,050	7,864	4,692	3,270	19,549
Affordable New Construction							
Customer Awareness, Outreach & Engagement			789	24,502	4,401	75,775	105,467
<b>Total</b>	<b>969</b>	<b>2,143</b>	<b>6,559</b>	<b>37,370</b>	<b>13,190</b>	<b>84,354</b>	<b>144,585</b>

## Appendix D: Budgets, Benefits, and Metrics by Sector

### D.1 Existing 1-4 Family Homes

Metric	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Total Budget Spend (\$000)	53,970	73,892	96,328	44,778	37,885	56,961	314					316,438
Additional Utility Funding* (\$000)												47,690
MWh Annual	3,285	5,021	5,491	2,635	2,071	2,868						21,371
MWh Lifetime	51,376	76,622	84,480	41,843	34,025	46,868						335,215
MMBtu Annual	184,765	259,416	301,711	136,558	129,387	164,363						1,176,201
MMBtu Lifetime	4,495,599	6,346,898	7,174,990	3,082,327	2,678,883	3,552,659						27,331,355
Participants	13,065	18,270	18,947	10,035	7,987	11,394						79,698
Leveraged Funds (\$000)	14,086	29,525	19,002	5,995	3,480	3,060						75,149

### D.2 Existing Affordable Multifamily Buildings

Metric	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Total Budget Spend (\$000)	17,732	24,819	34,243	56,862	120,889	94,587	36,609	45,110	7,959	3,075		442,007
Additional Utility Funding* (\$000)												(123)
Direct MWh Annual	7,976	12,204	11,684	13,083	21,449	23,511	7,023	14,991	4,343	1,132		117,396
Direct MWh Lifetime	129,590	188,874	171,766	209,205	332,513	364,368	105,345	224,865	65,145	16,980		1,808,651
Indirect MWh Annual			929	3,092	4,020	4,632	6,986	6,096	5,225	5,116	4,870	40,963
Indirect MWh Lifetime			13,928	37,417	51,344	60,242	88,420	75,073	62,007	60,372	55,575	504,376
Direct MMBtu Annual	91,432	240,577	361,929	496,507	483,033	746,826	340,601	935,094	552,011	296,358		4,544,368
Direct MMBtu Lifetime	1,703,344	4,690,767	7,112,913	9,349,335	9,071,118	11,927,831	5,116,360	14,026,415	8,280,164	4,445,363		75,723,610
Indirect MMBtu Annual			48,317	156,784	205,101	236,792	342,806	333,043	302,417	386,925	363,626	2,375,809
Indirect MMBtu Lifetime			724,755	1,906,050	2,630,805	3,092,665	4,736,395	4,589,947	4,130,559	5,398,180	5,021,333	32,230,689
Participants	3,808	9,844	77,635	110,118	89,561	79,455	2,689	1,342	867	461		375,780
Leveraged Funds (\$000)	17,555	29,172	56,110	100,148	74,021	76,107	106,565	57,765	32,063	28,426		577,930

### D.3 Affordable New Construction

Metric	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Total Budget Spend (\$000)	5,034	6,617	17,763	18,887	23,898	17,475	12,800	15,338	14,300	11,087	2,120	145,319
Direct MWh Annual	2,346	3,717	8,192	4,810	4,010	8,745	13,075	14,550	16,328	11,186	3,929	90,887
Direct MWh Lifetime	50,069	88,147	178,679	109,507	99,200	208,625	316,875	363,750	408,200	279,650	98,225	2,200,926
Indirect MWh Annual		121,917	1,553	1,553	1,553	1,553	1,553	1,553	1,553	1,553	1,553	135,890
Indirect MWh Lifetime		2,903,390	38,813	38,813	38,813	38,813	38,813	38,813	38,813	38,813	38,813	3,252,703
Direct MMBtu Annual	20,718	36,222	81,453	41,405	24,562	81,001	102,251	100,750	105,713	67,143	30,715	691,933
Direct MMBtu Lifetime	446,912	860,283	1,805,154	953,193	606,530	1,947,525	2,478,775	2,518,750	2,642,825	1,678,575	767,875	16,706,397
Indirect MMBtu Annual		1,041,234	8,750	8,750	8,750	8,750	8,750	8,750	8,750	8,750	8,750	1,119,980
Indirect MMBtu Lifetime		24,796,455	218,738	218,738	218,738	218,738	218,738	218,738	218,738	218,738	218,738	26,765,093
Participants	1,922	3,068	4,536	2,694	1,671	4,168	5,593	5,933	5,715	3,393	1,464	40,157
Leveraged Funds (\$000)	7,388	11,869	25,998	11,644	7,074	21,770	29,820	23,200	19,857	12,429	6,500	177,549

### D.4 Customer Awareness, Outreach, and Engagement

Metric	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Total Budget Spend (\$000)	3,225	1,029	5,074	8,580	16,534	28,721	13,296					76,459
MWh Annual	35,612	9,400	30,635	37,022	16,156	11,198						140,024
MWh Lifetime	126,094	33,284	316,944	290,193	96,289	146,012						1,008,815
MMBtu Annual	35,208	865	9,578	84,581	42,383	174,161						346,776
MMBtu Lifetime	352,077	8,649	97,331	861,791	424,041	1,816,153						3,560,043
Participants	501,558	66,682	261,687	392,922	342,289	199,075						1,764,213
Leveraged Funds (\$000)	2,028	1,028										3,056

### D.5 Pilots and Demonstrations

Metric	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Total Budget Spend (\$000)			469	277	107							853
MWh Annual												-
MWh Lifetime												-
MMBtu Annual												-
MMBtu Lifetime												-
Participants												-
Leveraged Funds (\$000)												-

## D. 6 NYS Healthy Homes VBP

Metric	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Total Budget Spend (\$000)	921	285	530	633	889	998						4,256
Direct MWh Annual		0	1	7	90	81						180
Direct MWh Lifetime		6	20	94	1,260	1,134						2,514
Indirect MWh Annual	96								1,214		12,737	14,047
Indirect MWh Lifetime	1,344								16,996		178,318	196,658
Direct MMBtu Annual			2	40	3,000	2,700						5,742
Direct MMBtu Lifetime			41	995	60,000	54,000						115,037
Indirect MMBtu Annual	3,200								33,128		425,500	461,828
Indirect MMBtu Lifetime	64,000								662,560		8,510,000	9,236,560
Participants		1	3	4	150	142						300
Leveraged Funds (\$000)												-

## D.7 Building Electrification<sup>118</sup>

Metric	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Total Budget Spend (\$000)	13	3,845	2,203	1,806	615	3,137	7,488	5,643	5,250			30,000
MWh Annual												-
MWh Lifetime												-
MMBtu Annual												-
MMBtu Lifetime												-
Participants												-
Leveraged Funds												-

<sup>118</sup> At the time of this filing, the Building Electrification activities are currently being planned. Projected savings, participants, leveraged funds, and participant bill savings will be incorporated in an updated future filing of the Implementation Plan.



## D.8 LMI Solar

Metric	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total
Total Budget Spend (\$000)	1,283	895	837	1,229	1,348	1,300	1,280	1,158	1,112	1,100		11,541
MWh Annual												-
MWh Lifetime												-
MMBtu Annual												-
MMBtu Lifetime												-
Participants												-
Leveraged Funds												-

## Appendix E: Preliminary BCA Results by Program Administrator

The table below lists the benefits and costs considered in calculating benefit/cost ratios for the Statewide LMI Portfolio.<sup>119</sup>

Type	Component
Costs	Measure equipment and installation (labor) costs
	Program administrator costs (program administration, including marketing, implementation contractor, and EM&V)
Benefits	Avoided energy costs
	Deferred capacity costs (generation, transmission, and distribution)
	Reduced CO <sub>2</sub> emissions

The following tables report preliminary BCA results by Program Administrator.

### E.1 Central Hudson

	SCT			UCT		
	Benefits	Costs	Benefit Cost Ratio	Benefits	Costs	Benefit Cost Ratio
2024	\$1,339,221	\$1,017,392	1.32	\$731,813	1,015,922	0.72
2025	\$962,742	\$1,316,425	0.73	\$527,307	1,314,945	0.40

<sup>119</sup> While the Program Administrators provided an updated BCA in 2022 (*i.e.*, NE: NY Proceeding, Statewide Low- to Moderate-Income Portfolio Implementation Plan, Version 2 (filed April 29, 2022)), a new BCA was not conducted for the Nov. 1, 2022 filing or May 1, 2023. A new BCA will be conducted in conjunction with the next annual Implementation Plan to be filed, scheduled for filing in the fall of 2023.

## E.2 Con Edison

	SCT			UCT		
	Benefits	Costs	Benefit Cost Ratio	Benefits	Costs	Benefit Cost Ratio
2024	\$80,464,805	\$152,543,528	0.53	\$46,676,475	\$91,335,427	0.51
2025	\$47,407,251	\$79,655,008	0.60	\$27,814,997	\$44,452,325	0.63

## E.3 National Grid (KEDLI)

	SCT			UCT		
	Benefits	Costs	Benefit Cost Ratio	Benefits	Costs	Benefit Cost Ratio
2024	\$6,215,445	\$13,071,772	0.48	\$3,569,329	\$10,836,303	0.33
2025	\$6,485,164	\$12,372,211	0.52	\$3,747,584	\$9,980,734	0.38

## E.4 National Grid (KEDNY)

	SCT			UCT		
	Benefits	Costs	Benefit Cost Ratio	Benefits	Costs	Benefit Cost Ratio
2024	\$10,719,809	\$9,251,896	1.16	\$6,276,917	\$6,890,426	0.91
2025	\$22,830,152	\$17,671,012	1.29	\$13,434,769	\$12,807,818	1.05

## E.5 National Fuel Gas

	SCT			UCT		
	Benefits	Costs	Benefit Cost Ratio	Benefits	Costs	Benefit Cost Ratio
2024	\$1,698,770	\$7,531,975	0.23	\$840,004	\$7,567,697	0.11
2025	\$397,576	\$8,640,208	0.05	\$204,340	\$8,010,208	0.03

## E.6 New York State Energy Research & Development Authority

	SCT			UCT		
	Benefits	Costs	Benefit Cost Ratio	Benefits	Costs	Benefit Cost Ratio
2024	\$232,994,234	\$429,605,818	0.54	\$122,577,164	\$51,873,342	2.36
2025	\$334,331,188	\$422,887,520	0.79	\$180,745,007	\$73,947,372	2.44
2026	\$277,436,695	\$377,416,943	0.74	\$147,289,796	\$71,756,120	2.05
2027	\$34,100,464	\$435,008,922	0.08	\$17,172,153	\$63,662,354	0.27
2028	\$30,708,113	\$30,599,650	1.00	\$14,928,408	\$22,659,544	0.66
2029	\$18,185,238	\$11,504,398	1.58	\$8,755,579	\$7,497,434	1.17

## E.7 New York State Electric & Gas (NYSEG)

	SCT			UCT		
	Benefits	Costs	Benefit Cost Ratio	Benefits	Costs	Benefit Cost Ratio
2024	\$1,281,407	\$5,215,792	0.25	\$518,095	\$5,016,230	0.10
2025	\$1,912,810	\$6,211,091	0.31	\$811,396	\$5,904,404	0.14

## E.8 National Grid (NMPC)

	SCT			UCT		
	Benefits	Costs	Benefit Cost Ratio	Benefits	Costs	Benefit Cost Ratio
2024	\$16,739,595	\$21,696,440	0.77	\$6,605,543	\$13,693,047	0.48
2025	\$15,016,062	\$28,022,823	0.54	\$6,118,086	\$17,002,629	0.36

## E.9 Orange & Rockland

	SCT			UCT		
	Benefits	Costs	Benefit Cost Ratio	Benefits	Costs	Benefit Cost Ratio
2024	\$283,223	\$2,350,441	0.12	\$175,625	\$2,263,619	0.08
2025	\$298,223	\$2,115,022	0.14	\$135,632	\$1,994,055	0.07

E.10 Rochester Gas & Electric (RG&E)

	SCT			UCT		
	Benefits	Costs	Benefit Cost Ratio	Benefits	Costs	Benefit Cost Ratio
2024	\$1,179,208	\$2,750,518	0.43	\$481,719	\$2,564,649	0.19
2025	\$2,372,168	\$3,260,330	0.73	\$1,089,723	\$2,930,011	0.37

## Appendix F: Implementation Milestones

This Appendix provides additional detail regarding the milestones provided in the 2020 Plan, this Plan, and other Plans from intervening years. The tables below have several milestone columns to indicate whether a milestone is from the 2020 Plan or is new or updated in this Plan, or another intervening Plan. The final column provides the Status as of the filing of this Plan. Additional information on the progress of meeting milestones to date is provided in Annual Reports. For example, the 2021 Annual Report provides additional detail on progress made in 2021 towards the milestones from 2020 and 2021 as laid out in the 2020 Implementation Plan.<sup>120</sup> Any milestone with the status “Delayed” or “No Longer Applicable” has its status explained in more detail below its respective milestone table.

### F.1 1-4 Family Homes

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan <sup>121</sup>	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2020	<ul style="list-style-type: none"> <li>Redesign of current set of initiatives to better align utility and NYSEERDA offers, improve customer experience by reducing administrative burden, and developing a more graduated scale of financial support</li> </ul>				Complete
2020	<ul style="list-style-type: none"> <li>Stakeholder engagement to inform redesign of</li> </ul>				Complete

<sup>120</sup> NE: NY Proceeding, 2021 Annual Report.

<sup>121</sup> Most milestones included in the “Milestone Added or Updated in a 2022 revision to the Implementation Plan” column throughout Appendix F were updated or added in the April 29, 2022, Implementation Plan filing. Some were added or further updated in the November 1, 2022, filing. Where a milestone was added or further updated in the November 1 filing, it is indicated by an explanatory footnote.

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan <sup>121</sup>	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
	programs				
2020	<ul style="list-style-type: none"> <li>• Test a model geographic-based eligibility and determine how it can be applied to programs going forward</li> </ul>				Complete
2021	<ul style="list-style-type: none"> <li>• Launch of redesigned programs (<i>milestone moved from 2021 to 2023</i>)</li> </ul>				Delayed
2021	<ul style="list-style-type: none"> <li>• Ongoing stakeholder engagement and coordination with other programs (<i>e.g.</i>, HEAP and WAP)</li> </ul>				No Longer Applicable
2022	<ul style="list-style-type: none"> <li>• Calibration of programs, where necessary, to improve impact and reach underserved or otherwise disadvantaged communities</li> </ul>				No Longer Applicable

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan <sup>121</sup>	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2022	<ul style="list-style-type: none"> <li>• Ongoing stakeholder engagement and coordination with other programs (e.g., HEAP and WAP)</li> </ul>	<ul style="list-style-type: none"> <li>• Improve coordination with other programs (e.g., HEAP and WAP)</li> </ul>			No Longer Applicable
2022		<ul style="list-style-type: none"> <li>• Enhance effectiveness of the EmPower referral process and improve customer conversion rate by conforming to consistent data file submission to NYSERDA</li> </ul>			Complete
2022		<ul style="list-style-type: none"> <li>• Identify ways to enhance or add measures to the existing EmPower offerings, particularly for gas savings (<i>milestone moved from 2022 to 2024</i>)</li> </ul>			Delayed
2022		<ul style="list-style-type: none"> <li>• Contract for new program workflow software and implementation support services</li> </ul>			Complete
2022		<ul style="list-style-type: none"> <li>• Work with NYS Clean Heat JMC to streamline customer access to both NYS Clean Heat and EmPower with appropriate affordability protections</li> </ul>			No Longer Applicable
2022		<ul style="list-style-type: none"> <li>• Outline and seek input on a</li> </ul>			Delayed



Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan <sup>121</sup>	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
		plan to phase out support for fossil fuel fired equipped in GJGNY audits, financing, and LMI programs to align with Climate Act while preserving energy affordability ( <i>milestone moved from 2022 to 2023</i> )			
2022		<ul style="list-style-type: none"> <li>• Increase awareness, community outreach and education through coordination with the new Clean Energy Hubs and existing utility outreach programs.</li> </ul>	<ul style="list-style-type: none"> <li>• Facilitate coordination between the new Clean Energy Hubs and existing utility outreach programs</li> </ul>		Complete
			<ul style="list-style-type: none"> <li>• Increase awareness, community outreach and education through coordination between the Clean Energy Hubs and utility outreach programs (<i>milestone moved from 2022 to 2024</i>)</li> </ul>		Delayed
2023	<ul style="list-style-type: none"> <li>• Launch of redesigned programs (<i>milestone moved to 2023 from 2021</i>)</li> </ul>	<ul style="list-style-type: none"> <li>• Launch the combined, streamlined LMI program: EmPower+</li> </ul>			Complete
2023		<ul style="list-style-type: none"> <li>• Integrate EmPower+ and NYS Clean Heat offerings to increase access to incentives for electrification</li> </ul>			No Longer Applicable
2023		<ul style="list-style-type: none"> <li>• Pursue opportunities to obtain and incorporate funding from</li> </ul>			In Progress

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan <sup>121</sup>	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
		the Inflation Reduction Act into LMI programs <sup>122</sup> ( <i>milestone moved from 2023 to 2024</i> )			
2023		<ul style="list-style-type: none"> <li>• Increase DAC access to EmPower+ by incorporating DAC geographic eligibility and coordinating with regional Clean Energy Hubs on targeted outreach to DACs</li> </ul>	<ul style="list-style-type: none"> <li>• Increase DAC access to EmPower+ by incorporating DAC geographic eligibility</li> </ul>		Complete
2023			<ul style="list-style-type: none"> <li>• Increase DAC access to EmPower+ by coordinating with regional Clean Energy Hubs on targeted outreach to DACs</li> </ul>	<ul style="list-style-type: none"> <li>• Continue to increase DAC access to EmPower+ by coordinating with regional Clean Energy Hubs on targeted outreach to DACs (<i>milestone moved from 2023 to 2024</i>)</li> </ul>	In Progress
2023			<ul style="list-style-type: none"> <li>• Outline and seek input on a plan to phase out support for fossil fuel fired equipment in GJGNY audits, financing, and LMI programs to align with Climate Act while preserving energy affordability (<i>milestone moved to 2023 from 2022</i>)</li> </ul>		In Progress
2024		<ul style="list-style-type: none"> <li>• Evaluate program performance and optimize design to serve more homes and encourage</li> </ul>		<ul style="list-style-type: none"> <li>• Continue to optimize program design to serve more homes and encourage more</li> </ul>	In Progress

<sup>122</sup> Milestone added in the November 1, 2022, Implementation Plan filing.

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan <sup>121</sup>	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
		more contractors to offer efficiency and electrification services through the program		contractors to offer efficiency and electrification services through the program	
2024		<ul style="list-style-type: none"> <li>• Increase contractor base and expand offerings to meet increased climate goals</li> </ul>			In Progress
2024			<ul style="list-style-type: none"> <li>• Identify ways to enhance or add measures to the existing EmPower+ offerings, particularly for gas savings (<i>milestone moved to 2024 from 2022</i>)</li> </ul>		Complete
2024			<ul style="list-style-type: none"> <li>• Increase awareness, community outreach and education through coordination between the Clean Energy Hubs and utility outreach programs (<i>milestone moved to 2024 from 2022</i>)</li> </ul>	<ul style="list-style-type: none"> <li>• Continue to increase awareness, community outreach and education through coordination between the Clean Energy Hubs and utility outreach programs</li> </ul>	In Progress
2024			<ul style="list-style-type: none"> <li>• Increase DAC access to EmPower+ by coordinating with regional Clean Energy Hubs on targeted outreach to DACs (<i>milestone moved to 2024 from 2023</i>)</li> </ul>	<ul style="list-style-type: none"> <li>• Continue to increase DAC access to EmPower+ by coordinating with regional Clean Energy Hubs on targeted outreach to DACs</li> </ul>	In Progress

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan <sup>121</sup>	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2024			<ul style="list-style-type: none"> <li>Pursue opportunities to obtain and incorporate funding from the Inflation Reduction Act into LMI programs (<i>milestone moved to 2024 from 2023</i>)</li> </ul>		Complete
2024				<ul style="list-style-type: none"> <li>Discuss ways to enhance or add measures to the existing EmPower+ offerings, particularly for gas savings</li> </ul>	Complete
2025			<ul style="list-style-type: none"> <li>Continue to integrate funding from the IRA to increase adoption of building electrification</li> </ul>		In Progress
2025			<ul style="list-style-type: none"> <li>Prepare for the expansion of EmPower+ in NYC/Long Island area</li> </ul>		Planning
2025			<ul style="list-style-type: none"> <li>Integrate a dynamic customer program interface to aid in outreach to LMI homes</li> </ul>		In Progress
2025				<ul style="list-style-type: none"> <li>NYSERDA and National Grid to file and execute on a transition plan for KEDLI HEAT projects as KEDLI HEAT closes at the end of 2025 and EmPower+ begins serving</li> </ul>	In Progress

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan <sup>121</sup>	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
				KEDLI gas customers <sup>123</sup>	

***Milestones marked as “Delayed” or “No Longer Applicable”***

The “Launch of redesigned programs” milestone originally included for 2021 in the 2020 Implementation Plan is marked as “Delayed” in this Implementation Plan due to unforeseen unavailability of program management software and the need to procure new program workflow software and implementation support services to operate EmPower+. It is anticipated that new software and implementation support will be acquired and operational by 2023. Therefore, a new milestone for the “Launch of the combined, streamlined LMI program: EmPower+” has been added for 2023.

The “Ongoing stakeholder engagement and coordination with other programs (e.g., HEAP and WAP)” and “Improve coordination with other programs (e.g., HEAP and WAP)” milestones originally included for 2021 and 2022 in the 2020 and 2022 Implementation Plans are marked as “No Longer Applicable” because they are now considered to be ongoing objectives for 1-4 Family Homes programs, and thus not appropriate milestones for individual program years.

The “Calibration of programs, where necessary, to improve impact and reach underserved or otherwise disadvantaged communities” milestone originally included for 2022 in the 2020 Implementation Plan is marked as “No Longer Applicable” because it has been replaced with more specific and actionable milestones, such as the “Increase DAC access to EmPower by incorporating geographic eligibility and coordinating with regional Clean Energy Hubs on targeted outreach to DACs” milestone and the “Work with NYS Clean Heat JMC to streamline customer access to both NYS Clean Heat and EmPower with appropriate affordability protections” milestone.

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<sup>123</sup> The KEDNY/KEDLI rate case directs National Grid to collaborate with NYSEDA and DPS Staff to develop and file with the Commission a transition plan addressing customer outreach to inform affected customers of the transfer of responsibility for programs equivalent to the HEAT program to NYSEDA, planned periods reporting, processes to limit or avoid gaps in program offerings and a timeframe for completing HEAT projects beyond 2025, if applicable (*KEDNY/KEDLI rate case*, p. 136)

The “Identify ways to enhance or add measures to the existing EmPower offerings, particularly for gas savings” milestone originally included for 2022 in the 2022 Implementation Plan is marked as “Delayed” because Program Administrators plan to consider ways to enhance or add EmPower measures in 2024.

The “Work with NYS Clean Heat JMC to streamline customer access to both NYS Clean Heat and EmPower with appropriate affordability protections” milestone originally included for 2022 in the 2022 Implementation Plan is marked as “No Longer Applicable,” which reflects the present strategic priorities of the LMI Portfolio.

The “Outline and seek input on a plan to phase out support for fossil fuel fired equipped in GJGNY audits, financing, and LMI programs to align with Climate Act while preserving energy affordability” milestone originally included for 2022 in the 2022 Implementation Plan is marked as “Delayed” because it is currently in progress in 2023.

The “Increase awareness, community outreach and education through coordination with the new Clean Energy Hubs and existing utility outreach programs” milestone originally included for 2022 in the 2022 Implementation Plan has been replaced with two milestones in the 2023 Implementation Plan. While Program Administrators facilitated coordination between the Clean Energy Hubs and existing utility outreach programs in 2023, Program Administrators plan to leverage this strategic partnership to increase awareness, community outreach, and education starting in 2024.

The “Integrate EmPower+ and NYS Clean Heat offerings to increase access to incentives for electrification” originally included for 2023 in the 2022 Implementation Plan is marked as “No Longer Applicable,” which reflects the present strategic priorities of the LMI Portfolio.

The “Pursue opportunities to obtain and incorporate funding from the Inflation Reduction Act into LMI programs” milestone originally included for 2023 in the 2022 Implementation Plan is marked as “Delayed,” as Program Administrators plan to achieve this milestone in 2024.

The “Increase DAC access to EmPower+ by incorporating DAC geographic eligibility and coordinating with regional Clean Energy Hubs on targeted outreach to DACs” originally included for 2023 in the 2022 Implementation Plan has been divided into two milestones in the 2023 Implementation Plan. The first milestone, “Increase DAC access to EmPower+ by incorporating DAC geographic eligibility,” is complete as of 2023. The second milestone, “Increase DAC access to EmPower+ by coordinating with regional Clean Energy Hubs on targeted outreach to DACs” is marked as “Delayed” as it is now targeted for completion in 2024.

## F.2 Affordable Multifamily Energy Efficiency Program

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2020	<ul style="list-style-type: none"> <li>Determine implementation structure and coordination among Program Administrators</li> </ul>				Complete
2020	<ul style="list-style-type: none"> <li>Develop a consistent framework for an incentive program that promotes comprehensive upgrades but allows flexibility for prescriptive upgrades</li> </ul>				Complete
2020	<ul style="list-style-type: none"> <li>Develop process to coordinate technical assistance with incentive-based program</li> </ul>				Complete
2021	<ul style="list-style-type: none"> <li>Launch consistent statewide framework for incentive-based program</li> </ul>				Complete
2021	<ul style="list-style-type: none"> <li>Identify additional areas to streamline administration of</li> </ul>				Delayed

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
	program ( <i>milestone moved from 2021 to 2022</i> )				
2022	<ul style="list-style-type: none"> <li>Identify additional areas to streamline administration of program (<i>milestone moved to 2022 from 2021</i>)</li> </ul>				No Longer Applicable
2022	<ul style="list-style-type: none"> <li>Calibration of programs, where necessary, to improve impact and reach underserved or otherwise disadvantaged communities (<i>milestone moved from 2022 to 2023</i>)</li> </ul>				Delayed
2022	<ul style="list-style-type: none"> <li>Ongoing stakeholder engagement and coordination with other programs (<i>e.g., NYS HCR, NYC HPD and housing agencies</i>)</li> </ul>	<ul style="list-style-type: none"> <li>Develop Program Administrator processes for statewide operations of AMEEP (<i>e.g., document updates</i>) and launch webinar series to engage Participating</li> </ul>			Complete <sup>124</sup>

<sup>124</sup> Status updated from “In Progress” in the April 29, 2022, Implementation Plan filing to “Complete” in the November 1, 2022, Implementation Plan filing.



Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
		Contractors and Industry Partners by Q2			
2022		<ul style="list-style-type: none"> <li>Coordinate AMEEP incentives with NYS Clean Heat and align release to market with NYS Clean Heat announcement cycles for program changes</li> </ul>			No Longer Applicable
2023	<ul style="list-style-type: none"> <li>Calibration of programs, where necessary, to improve impact and reach underserved or otherwise disadvantaged communities (<i>milestone moved from 2022 to 2023</i>)</li> </ul>	<ul style="list-style-type: none"> <li>Organize stakeholder interviews on AMEEP design and operations based on the first full year of operation to get feedback to guide analysis and potential program changes, and adapt program eligibility to reflect final DAC criteria</li> </ul>			Complete <sup>125</sup>
2023		<ul style="list-style-type: none"> <li>Review program objectives and operations to enable alignment with potential policy changes scheduled to take place in 2022 and 2023 (<i>e.g.</i>, NE: NY mid-point review, Climate Act definition</li> </ul>			Delayed

<sup>125</sup> The Program Administrators held an AMEEP Roundtable in August 2023 to collect stakeholder feedback regarding AMEEP design and operations. Adapting AMEEP eligibility to reflect final DAC criteria is an ongoing objective for the LMI Portfolio.

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
		of providing benefits to DACs) <i>(milestone moved from 2023 to 2024)</i>			
2024		<ul style="list-style-type: none"> <li>Study creation of measure packages for comprehensive retrofits by building typology based on data from AMEEP participants, and assess ability to offer packages as part of AMEEP</li> </ul>			No Longer Applicable
2024			<ul style="list-style-type: none"> <li>Review program objectives and operations to enable alignment with potential policy changes scheduled to take place in 2022 and 2023 (<i>e.g.</i>, NE: NY mid-point review, Climate Act definition of providing benefits to DACs) <i>(milestone moved to 2024 from 2023)</i></li> </ul>		In Progress <sup>126</sup>
2025				<ul style="list-style-type: none"> <li>Upstate utilities will collaborate with NYSERDA to transition program implementation for affordable multifamily</li> </ul>	In Progress

<sup>126</sup> The Program Administrators note that achievement of this milestone may be realized in 2025.

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
				properties. This effort will entail developing a timeline for this transition, a working group to support development of NYSERDA's new offering, and a plan to communicate these changes to the upstate affordable multifamily market.	
2025				<ul style="list-style-type: none"> <li>• Con Edison, Downstate National Grid, and NYSERDA will collaborate to continue and enhance implementation of incentive programs serving the downstate affordable multifamily market. This effort will, at a minimum, entail developing a plan emphasizing program efficiency and market education.</li> </ul>	In Progress

*Milestones marked as “Delayed” or “No Longer Applicable”*

The “Identify additional areas to streamline administration of program” milestone originally included for 2021 in the 2020 Implementation Plan was moved to 2022 in the 2022 Implementation Plan because AMEEP was launched in late 2021 and the Program Administrators sought to observe AMEEP in-market in order to best identify potential administrative streamlining opportunities. Now that AMEEP has

been in-market for two years, the Program Administrators consider streamlining administration of the program to be an ongoing objective, and thus not an appropriate milestone for an individual program year. It has therefore been marked as “No Longer Applicable” in the 2023 Implementation Plan.

The “Calibration of programs, where necessary, to improve impact and reach underserved or otherwise disadvantaged communities” milestone originally included for 2022 in the 2020 Implementation Plan was moved to 2023, and the language was refined to “Organize stakeholder interviews on AMEEP design and operations based on the first full year of operation to get feedback to guide analysis and potential program changes” in the 2022 Implementation Plan to make the milestone more actionable.

The “Ongoing stakeholder engagement and coordination with other programs (e.g., NYS HCR, NYC HPD and housing agencies)” milestone was replaced with the “Develop Program Administrator processes for statewide operations of AMEEP and launch webinar series to engage Participating Contractors and Industry Partners by Q2” milestone in 2022, which is more specific and actionable.

The “Coordinate AMEEP incentives with NYS Clean Heat and align release to market with NYS Clean Heat announcement cycles for program changes” milestone originally included for 2022 in the 2022 Implementation Plan is marked as “No Longer Applicable,” which reflects the present strategic priorities of the LMI Portfolio.

The “Review program objectives and operations to enable alignment with potential policy changes scheduled to take place in 2022 and 2023” milestone has been moved to 2024 and may extend into 2025, given ongoing policy changes and dialogue.

The “Study creation of measure packages for comprehensive retrofits by building typology based on data from AMEEP participants and assess ability to offer packages as part of AMEEP” milestone originally identified in the 2022 is marked as “No Longer Applicable.” Based on continued analysis and stakeholder feedback, the PAs determined inclusion of comprehensive measure packages by building typology does not best meet the dynamic needs of the multifamily market.

### F.3 Multi-Year Affordable Housing Partnerships<sup>127</sup>

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2020	<ul style="list-style-type: none"> <li>• Work with housing agencies to develop an approach to directly incorporate program incentives into the capital stack for affordable multifamily buildings that are being refinanced</li> </ul>				Complete
2021	<ul style="list-style-type: none"> <li>• Launch approach to working with housing agencies</li> </ul>				Complete
2022	<ul style="list-style-type: none"> <li>• Ongoing stakeholder engagement and coordination with other programs (e.g., NYS HCR, NYC HPD and housing agencies)</li> </ul>	<ul style="list-style-type: none"> <li>• Expand direct funding partnership between NYSEDA and NYS HCR to serve affordable housing new construction and preservation</li> </ul>			Complete
2022		<ul style="list-style-type: none"> <li>• NYSEDA to support housing agencies in development of sustainability/design guidelines for efficient, all-electric new construction and retrofit projects</li> </ul>			Complete
2022		<ul style="list-style-type: none"> <li>• Issue Clean Heat for All packaged window heat pump RFP through partnership</li> </ul>			Complete

<sup>127</sup> 2020-2022 milestones in Appendix F.3 were previously included in Appendix F.2 (Statewide Existing Affordable Multifamily Program) of the 2022 Implementation Plan.

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
		between NYSERDA, NYPA, and NYCHA			
2022		<ul style="list-style-type: none"> <li>Along with NYCHA and NYPA, select winning manufacturer(s) that responded to Clean Heat for All packaged window heat pump challenge RFP</li> </ul>			Complete
2022		<ul style="list-style-type: none"> <li>Provide technical assistance and staffing resources to assist with capacity-building at HCR and HPD</li> </ul>			Complete
2023		<ul style="list-style-type: none"> <li>Issue initial small purchase order for and install initial packaged window heat pumps in NYCHA properties as part of 'demonstration phase' of Clean Heat for All initiative</li> </ul>			Completed
2023			<ul style="list-style-type: none"> <li>Begin M&amp;V of installed units to measure performance through the heating season</li> </ul>		Completed
2023			<ul style="list-style-type: none"> <li>Begin contracting with first cohort of projects selected under the Future Housing</li> </ul>		Completed

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
			Initiative (FHI) new construction pilot program with NYC HPD		
2023				<ul style="list-style-type: none"> <li>Assess the efficacy of the Direct Injection funding approach in promoting electrification and energy efficiency in existing buildings going through the refinancing cycle.</li> </ul>	Completed
2024		<ul style="list-style-type: none"> <li>Assess viability of packaged window heat pumps as an effective electrification approach/model for NYCHA housing and broader NY multifamily market packages as part of AMEEP</li> </ul>			In Progress
2024		<ul style="list-style-type: none"> <li>Pending success of demonstration phase, initiate broader implementation phase of Clean Heat for All initiative and install additional packaged window heat pumps</li> </ul>			In Progress
2024			<ul style="list-style-type: none"> <li>Assess the efficacy of the Direct Injection funding</li> </ul>	<ul style="list-style-type: none"> <li>Begin contracting with second cohort of projects selected</li> </ul>	In Progress

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
			approach in promoting electrification and energy efficiency in existing buildings going through the refinancing cycle	under FHI new construction pilot program with NYC HPD.	
2024				<ul style="list-style-type: none"> <li>Initiate second phase of HPD/NYSERDA partnership (REDi: EB) to incentivize heat pump electrification retrofits.</li> </ul>	In Progress

***Milestones marked as “Delayed” or “No Longer Applicable”***

The “Ongoing stakeholder engagement and coordination with other programs (e.g., NYS HCR, NYC HPD and housing agencies)” milestone originally included for 2022 in the 2020 Implementation Plan has been replaced with “Expand direct funding partnership between NYSEDA and NYS HCR to serve affordable housing new construction and preservation,” which is more specific and actionable.



#### F.4 Technical Assistance for Affordable Multifamily Buildings

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2020	• Develop process to coordinate technical assistance with incentive-based program				Complete
2020	• Work with housing agencies and financiers to identify gaps in available performance data and invest in the development of data sets that can be used to aid in determinations on underwriting and build confidence among financiers and housing agencies				Complete
2021	• Launch technical assistance in a coordinated approach with the incentive-based program				Complete
2021	• Identify additional opportunities to work with housing agencies and financiers to develop initiatives to aid in project development				Complete
2021		• Identify technical assistance provider to service NYSERDA/			Complete

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
		NYC HPD electrification pilot <sup>128</sup>			
2021		<ul style="list-style-type: none"> <li>Identify projects for the NYSERDA/ NYC HPD electrification pilot</li> </ul>			Complete
2021		<ul style="list-style-type: none"> <li>NYSERDA will offer FlexTech services for AMEEP projects that pay SBC on gas but not electric</li> </ul>			Complete
2021		<ul style="list-style-type: none"> <li>NYSERDA will assess how technical assistance feeds into and informs the development and completion of the 2M climate friendly homes by 2030 action plan</li> </ul>			Complete
2021		<ul style="list-style-type: none"> <li>Clean Heating and Cooling Analysis of FlexTech studies that will help inform future program development and is intended to increase the rate at which clean energy</li> </ul>			Complete

<sup>128</sup> Additional historical milestones for 2021 (*i.e.*, as compared to the 2020 Plan) are provided here to reflect additional detail for Technical Assistance for Affordable Multifamily Buildings.

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
		technologies are identified through studies or best practices			
2022	<ul style="list-style-type: none"> <li>• Calibration of programs, where necessary, to improve impact and reach underserved or otherwise disadvantaged communities.</li> </ul>	<ul style="list-style-type: none"> <li>• Update program eligibility to increase access in disadvantaged communities (<i>milestone moved from 2022 to 2023</i>)</li> </ul>			Delayed
2022	<ul style="list-style-type: none"> <li>• Ongoing stakeholder engagement and coordination with other programs (e.g., NYS HCR, NYC HPD and housing agencies)</li> </ul>	<ul style="list-style-type: none"> <li>• Engage with NYS HCR colleagues, affordable housing owners, and developers to refine integration of technical assistance within housing financing application processes</li> </ul>			Complete
2022		<ul style="list-style-type: none"> <li>• Encourage energy service providers to include electrification and/or electrification readiness as part of any subsidized technical assistance scopes to support long-term decarbonization efforts</li> </ul>			Complete
2023		<ul style="list-style-type: none"> <li>• Provide technical assistance resources to housing agencies</li> </ul>			Complete

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
		to build in-house capacity to assess and support sustainability as part of core mission			
2023		<ul style="list-style-type: none"> <li>Require consideration of electrification and/or electrification readiness as part of any subsidized technical assistance to enable long-term building decarbonization efforts</li> </ul>	<ul style="list-style-type: none"> <li>Recommend consideration of electrification and/or electrification readiness as part of any subsidized technical assistance to enable long-term building decarbonization efforts <i>(milestone moved from 2023 to 2024)</i></li> </ul>		Ongoing
2023			<ul style="list-style-type: none"> <li>Update program eligibility to increase access in disadvantaged communities <i>(milestone moved to 2023 from 2022)</i></li> </ul>		Complete
2024			<ul style="list-style-type: none"> <li>Recommend consideration of electrification and/or electrification readiness as part of any subsidized technical assistance to enable long-term building decarbonization efforts</li> </ul>		No longer Applicable

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
			<i>(milestone moved to 2024 from 2023)</i>		
2024			<ul style="list-style-type: none"> <li>• Modify technical assistance offerings to increase engagement with disadvantaged communities</li> </ul>		Planning
2025			<ul style="list-style-type: none"> <li>• Plan transition to next iteration of NYSERDA technical assistance programs</li> </ul>		Planning

***Milestones marked as “Delayed” or “No Longer Applicable”***

The “Recommend consideration of electrification and/or electrification readiness as part of any subsidized technical assistance to enable long-term building decarbonization efforts” milestone originally included for 2023 in the 2022 Implementation Plan has been moved to 2024. Progress was made on this milestone in 2023 but it is now targeted for completion in 2024.

The “Update program eligibility to increase access in disadvantaged communities” milestone originally included for 2022 in the 2022 Implementation Plan has been moved to 2023, as it is currently in progress.

## F.5 RetrofitNY

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2021	<ul style="list-style-type: none"> <li>One or more solutions are built and tested through the design-build competition process</li> </ul>				In Progress
2021	<ul style="list-style-type: none"> <li>Solution(s) are adapted to additional building typologies</li> </ul>				In Progress
2022	<ul style="list-style-type: none"> <li>Integration of retrofit solutions in the public housing authorities' and affordable housing regulators' preservation strategies (<i>milestone moved from 2022 to 2023 and 2024</i>)</li> </ul>				No Longer Applicable
2023	<ul style="list-style-type: none"> <li>Integration of retrofit solutions in the public housing authorities' and affordable housing regulators' preservation strategies (<i>milestone moved to 2023 from 2022</i>)</li> </ul>	<ul style="list-style-type: none"> <li>Integration of retrofit solutions in the public housing authorities' strategies (<i>milestone moved to 2023 from 2022</i>)</li> </ul>			In Progress

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2023			<ul style="list-style-type: none"> <li>Close out RetrofitNY program and ensure that projects that have advanced through key stage gates receive support before program is closed (<i>Shifted from 2024 to 2025</i>)</li> </ul>		In Progress
2024	<ul style="list-style-type: none"> <li>Integration of retrofit solutions in the public housing authorities' and affordable housing regulators' preservation strategies (<i>milestone moved to 2024 from 2022</i>)</li> </ul>	<ul style="list-style-type: none"> <li>Integration of retrofit solutions into regulated affordable housing preservation strategies (<i>milestone moved to 2024 from 2022</i>)</li> </ul>			No Longer Applicable
2024			<ul style="list-style-type: none"> <li>Publish lesson learned and insights from RetrofitNY program</li> </ul>	<ul style="list-style-type: none"> <li>Publish lesson learned and insights from RetrofitNY program (shifted from 2024 to 2025)</li> </ul>	Future
2025	<ul style="list-style-type: none"> <li>Retrofit solutions are cost effective and NYSERDA subsidies are no longer necessary.</li> </ul>	<ul style="list-style-type: none"> <li>Deliver retrofit solutions that are cost effective such that NYSERDA subsidies are no longer necessary</li> </ul>			No Longer Applicable
2025	<ul style="list-style-type: none"> <li>Building components and systems required for deep energy retrofits are readily available in the New York market.</li> </ul>	<ul style="list-style-type: none"> <li>Develop a market for building components and systems required for deep energy</li> </ul>			No Longer Applicable

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
		retrofits so that they are readily available in New York			
2025	<ul style="list-style-type: none"> <li>Financing solutions exists for building owners to purchase these solutions with minimal upfront cost.</li> </ul>	<ul style="list-style-type: none"> <li>Support creation of financing solutions to enable building owners to take advantage of these solutions at scale</li> </ul>			No Longer Applicable
2025				<ul style="list-style-type: none"> <li>Publish lesson learned and insights from RetrofitNY program on NYSERDA's website (<i>Shifted from 2024 to 2025</i>)</li> </ul>	Future
2025				<ul style="list-style-type: none"> <li>Continue sunset of RetrofitNY program and ensure that projects that have advanced through key stage gates receive support before program is closed (<i>Shifted from 2024 to 2025</i>)</li> </ul>	In Progress

***Milestones marked as “Delayed” or “No Longer Applicable”***

The RetrofitNY program is closing at the end of 2023. Given this, all outstanding milestones from the 2020 and 2022 Implementation Plan have been marked as “No Longer Applicable” in this Implementation Plan.



## F.6 Multifamily LMI Decarbonization Demonstration Projects<sup>129</sup>

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2024			<ul style="list-style-type: none"> <li>• Build first cohort of LMI Multifamily Demonstration partners</li> </ul>		Future
2024			<ul style="list-style-type: none"> <li>• Fund first round of LMI Multifamily Demonstration projects</li> </ul>		Future
2025			<ul style="list-style-type: none"> <li>• Build second cohort of LMI Multifamily Demonstration partners</li> </ul>	<ul style="list-style-type: none"> <li>• Support design, procurement and construction of LMI Multifamily Demonstration projects</li> </ul>	Future
2025			<ul style="list-style-type: none"> <li>• Fund second round of LMI Multifamily Demonstration projects</li> </ul>	<ul style="list-style-type: none"> <li>• Support design, procurement and construction of LMI Multifamily Demonstration projects</li> </ul>	Future
2025			<ul style="list-style-type: none"> <li>• Publish lessons learned and key insights from LMI Multifamily Demonstration Program</li> </ul>		Future

<sup>129</sup> Section added in the 2023 Implementation Plan.

## F.7 Affordable New Construction

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2020	• Existing programs will continue				Complete
2020	• Design of coordinated offerings between NYSEDA and utilities				No Longer Applicable
2021	• Launch of coordinated program offerings				No Longer Applicable
2021	• Launch of high-performance demonstrations and competitions				Complete
2022	• Launch of high-performance demonstrations and competitions				Complete
2022	• Incorporation of lessons learned from previous demonstrations and competitions				Complete
2022		• Launch of Round 3 of the Buildings of Excellence Multifamily Design Competition			Complete <sup>130</sup>
2022		• Expand integrated funding			Complete

<sup>130</sup> Status updated from “In Progress” in the April 29, 2022, Implementation Plan filing to “Complete” in the November 1, 2022, Implementation Plan filing.

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2022		with State and local affordable housing agencies			
2023		<ul style="list-style-type: none"> <li>Continue expanding integration with public housing agencies</li> </ul>	<ul style="list-style-type: none"> <li>Continue supporting expanded integration with public housing agencies</li> </ul>		In Progress
2023		<ul style="list-style-type: none"> <li>Utilize data and successful sets from decarbonization projects to deploy information through Channel Partners, conferences, and other general awareness activities</li> </ul>			In Progress
2023			<ul style="list-style-type: none"> <li>Launch of Round 4 of the Buildings of Excellence Competition for multifamily building design</li> </ul>		In Progress
2024		<ul style="list-style-type: none"> <li>Continue expanding integration with public housing agencies</li> </ul>	<ul style="list-style-type: none"> <li>Continue supporting expanded integration with public housing agencies</li> </ul>		In Progress
2024		<ul style="list-style-type: none"> <li>Utilize data and successful sets from decarbonization projects to deploy information through Channel Partners, conferences, and other general awareness</li> </ul>			In Progress

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
		activities			
2024			<ul style="list-style-type: none"> <li>• Launch Round 5 of the Buildings of Excellence Competition for multifamily building design</li> </ul>		In Progress
2024				<ul style="list-style-type: none"> <li>• Launch of the updated Building Better Homes program</li> </ul>	In Progress
2024				<ul style="list-style-type: none"> <li>• Continuation of Buildings of Excellence Early Design Support Program</li> </ul>	In Progress
2025		<ul style="list-style-type: none"> <li>• Continue expanding integration with public housing agencies</li> </ul>	<ul style="list-style-type: none"> <li>• Continue supporting expanded integration with public housing agencies</li> </ul>		Future
2025		<ul style="list-style-type: none"> <li>• Utilize data and successful sets from decarbonization projects to deploy information through Channel Partners, conferences, and other general awareness activities</li> </ul>			Future
2025				<ul style="list-style-type: none"> <li>• Launch of Round 5 of the Buildings of Excellence Competition for multifamily building design</li> </ul>	Future
2025				<ul style="list-style-type: none"> <li>• Continuation of Buildings of Excellence Early Design Support Program</li> </ul>	Future

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2025				<ul style="list-style-type: none"> <li>Continuation of Buildings of Excellence Early Design Support Program</li> </ul>	Future

*Milestones marked as “Delayed” or “No Longer Applicable”*

The “Design of coordinated offerings between NYSERDA and utilities” and “Launch of coordinated program offerings” milestones originally included for 2020 and 2021 in the 2020 Implementation Plan are no longer applicable as the milestones have evolved with the New Construction portfolio. NYSERDA will continue to coordinate with Utilities throughout all sectors of the LMI portfolio.

## F.8 Building Electrification in LMI Homes

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2020	<ul style="list-style-type: none"> <li>Research and analysis on institutional barriers, consumer protections, and application of heat pump solutions to ensure greater impact for LMI customers, tenants, and affordable multifamily building owners</li> </ul>				Complete
	<ul style="list-style-type: none"> <li>Design of short-term incentives</li> </ul>	<ul style="list-style-type: none"> <li>Design and launch short-term incentives to offset costs of heat pump installations in LMI homes and affordable multifamily buildings to advance heat pump deployment in LMI housing and support future market learnings<sup>131</sup></li> </ul>			Complete
2021	<ul style="list-style-type: none"> <li>Continued research and analysis</li> </ul>				No Longer Applicable
2021	<ul style="list-style-type: none"> <li>Launch of short-term incentives to offset costs of heat pump installations in</li> </ul>				Complete

<sup>131</sup> This historical milestone for 2020 is updated (*i.e.*, as compared to the 2020 Plan) to provide additional detail regarding short-term incentives.

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
	LMI homes or affordable multifamily buildings				
2021	• Launch pilots and demonstrations				Complete
2021	• Assess lessons learned from research, analysis, pilots, and incentive offerings				In Progress
2022	• Continued pilots and demonstrations				No Longer Applicable
2022	• Continued incentive offerings				No Longer Applicable
2022	• Planning for long-term investment in electrification for the LMI market segment, based on research and analysis and learnings from the pilots, demonstrations, and incentive offerings				No Longer Applicable
2022		• Launch evaluation and market insights study based on projects completed through short-term			In Progress

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
		incentive offering incentive offerings			
2022		<ul style="list-style-type: none"> <li>• Publish LMI chapter within Building Electrification Roadmap, outlining key policy approaches to scale LMI electrification through 2030</li> </ul>			Complete
2022		<ul style="list-style-type: none"> <li>• Partner with sister agencies to aggressively shift existing benefit programs into alignment with the State’s housing decarbonization targets, especially LIHEAP, WAP, and the State’s Energy Affordability Policy and Utility Energy Assistance Programs</li> </ul>			Delayed
2022		<ul style="list-style-type: none"> <li>• Conduct research and analysis on electrification of affordable housing, develop recommendations for protecting tenants from heating cost shifts<sup>132</sup></li> </ul>			Complete <sup>133</sup>

<sup>132</sup> Milestone updated from “Conduct research and analysis leading to the development of an Affordability and Consumer Protections framework for LMI Electrification, outlined in the Two Million Climate-Friendly Homes Action Plan” in the April 29, 2022, Implementation Plan filing to current language.

<sup>133</sup> Status updated from “Planning” in the April 29, 2022, Implementation Plan filing to “In Progress” in the November 1, 2022, Implementation Plan filing.



Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2022		<ul style="list-style-type: none"> <li>Continue programmatic support for LMI heat pump installations, with a focus on segments that present the least technical difficulty and/or the most favorable return on investment, including buildings using delivered fuels and electric resistance heat, buildings with inefficient gas furnaces or boilers, and multifamily buildings with steam distribution systems</li> </ul>			In Progress
2022		<ul style="list-style-type: none"> <li>Design and launch a program offering supporting rapid response heat pump conversions in situations where existing fossil heating systems are at or near failure</li> </ul>			Delayed
2022		<ul style="list-style-type: none"> <li>Launch additional program support for LMI multifamily building owners seeking to integrate electrification into their portfolio by providing wraparound services for</li> </ul>			No Longer Applicable

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
		guidance on capital planning, identifying best-fit technology solutions, employee training, project scoping, how to overcome hurdles related to existing subsidy agreements and tenant leases, and identifying incentives and other financial support for installing heat pumps			
2022		<ul style="list-style-type: none"> <li>Design pilot(s) supporting DHW electrification conversions for multifamily buildings</li> </ul>			No Longer Applicable
2022		<ul style="list-style-type: none"> <li>Launch research focused on policy and regulatory initiatives that can further enable heat pump adoption in LMI housing</li> </ul>			In Progress
2022		<ul style="list-style-type: none"> <li>Conduct Stakeholder engagement to develop promising approaches for community- and place-based interventions supporting heat pump deployment in LMI and</li> </ul>			No Longer Applicable

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
		Disadvantaged Communities			
2022		<ul style="list-style-type: none"> <li>Develop and launch additional educational materials for LMI customers and building owners, including short how-to videos and other multimedia offerings</li> </ul>			In Progress
2022		<ul style="list-style-type: none"> <li>In collaboration with DPS and the utilities, identify the scope of and pathway to increased support for pre-electrification make-ready work such as electrical panel upgrades</li> </ul>			No Longer Applicable
2023		<ul style="list-style-type: none"> <li>Publish interim learnings from the single-family LMI heat pump demonstration study (short term incentives)</li> </ul>			Delayed
2023		<ul style="list-style-type: none"> <li>Publish interim learnings from the multifamily LMI heat pump demonstrations study (short term incentives)</li> </ul>			Delayed

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2023		<ul style="list-style-type: none"> <li>• Revise program rules to incorporate learnings from affordability and consumer protections research</li> </ul>			No Longer Applicable
2023			<ul style="list-style-type: none"> <li>• Convene contractors, suppliers, and manufacturers of heat pump solutions to provide insights on current practices and on how the State can expand support for heat pump conversions during emergency no heat situations in 1-4 family homes</li> </ul>		In Progress
2023			<ul style="list-style-type: none"> <li>• Convene affordable housing and finance stakeholders to gather information and determine an action plan for supporting heat pump adoption with tenant protections in the rent stabilized portfolio of NY's rental housing market</li> </ul>		In Progress
2023			<ul style="list-style-type: none"> <li>• Complete market research on and modeling of utility bill impacts of LMI electrification</li> </ul>		In Progress

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2023			<ul style="list-style-type: none"> <li>Complete market research on programmatic, policy, and regulatory barriers to electrification in LMI multifamily housing</li> </ul>		In Progress
2024		<ul style="list-style-type: none"> <li>Publish interim learnings from pilots and demonstrations</li> </ul>			No Longer Applicable
2024		<ul style="list-style-type: none"> <li>Revise program rules to incorporate affordability and consumer protections learnings from research and evaluation of real-world projects</li> </ul>			No Longer Applicable
2024			<ul style="list-style-type: none"> <li>Publish interim learnings from LMI heat pump demonstration study (short term incentives)</li> </ul>		In Progress
2024			<ul style="list-style-type: none"> <li>Socialize and begin implementing recommendations to State agencies from earlier market research on lowering programmatic, policy, and regulatory barriers to</li> </ul>		In Progress

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
			electrification in LMI multifamily housing.		
2024			<ul style="list-style-type: none"> <li>Partner with sister agencies to develop guidance for affordable multifamily building owners on electrification: pathways to secure state, utility, and federal funding for heat pump projects; and technical, legal, regulatory, and business considerations for altering provision of building services to tenants</li> </ul>		Future
2024			<ul style="list-style-type: none"> <li>Launch a pilot supporting rapid response heat pump conversions in situations where existing fossil heating systems are at or near failure, for 1-4 family homes (<i>Moved from 2024 to 2025</i>)</li> </ul>		In Progress
2025				<ul style="list-style-type: none"> <li>Launch follow-on research into policy and regulatory initiatives that can enable</li> </ul>	Future

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
				heat pump adoption in LMI housing	
2025				<ul style="list-style-type: none"> <li>Launch a pilot supporting rapid response heat pump conversions in situations where existing fossil heating systems are at or near failure, for 1-4 family homes (Moved from 2024 to 2025)</li> </ul>	Future
2025				<ul style="list-style-type: none"> <li>Revise program rules to incorporate affordability and consumer protections learnings from research and evaluation of real-world projects</li> </ul>	Future

***Milestones marked as “Delayed” or “No Longer Applicable”***

The milestones marked as “Delayed” and “No Longer Applicable” have evolved and are combined to create new milestones as noted above.

### F.9 New York State Healthy Homes Value-Based Payment Pilot

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2020		<ul style="list-style-type: none"> <li>Finalize specification list for the Healthy Homes intervention associated with the pilot</li> </ul>			Complete
		<ul style="list-style-type: none"> <li>Onboard energy services implementation contractor and health services implementation partners</li> </ul>			Complete
		<ul style="list-style-type: none"> <li>Secure submission of social determinants of health template for VBP Arrangement integration</li> </ul>			Complete
		<ul style="list-style-type: none"> <li>Finalize specification list for healthy homes interventions that address asthma and household injury</li> </ul>			Complete
2021		<ul style="list-style-type: none"> <li>Release a Request for Qualifications for pilot participating energy/housing service providers and assign pilot participation status to qualified providers</li> </ul>			Complete
		<ul style="list-style-type: none"> <li>Commence pilot field work</li> </ul>			Complete



Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2022		<ul style="list-style-type: none"> <li>• Complete value-based payment participation toolkits for MCO/VBP providers and community-based organizations</li> </ul>			Complete
2023		<ul style="list-style-type: none"> <li>• Commence interim reporting on Year One intervention implementation process<sup>134</sup></li> </ul>	<ul style="list-style-type: none"> <li>• Commence interim reporting on Year One intervention implementation process, to be incorporated into Pilot outcomes and evaluation report</li> </ul>		Complete and Ongoing
2024		<ul style="list-style-type: none"> <li>• Complete draft of the full evaluation report</li> </ul>	<ul style="list-style-type: none"> <li>• Complete draft of the Pilot outcome analysis, to be incorporated into the full Pilot evaluation</li> </ul>		Planning

<sup>134</sup> Milestone delayed from 2022 in the April 29, 2022, Implementation Plan filing to 2023 in the November 1, 2022, Implementation Plan filing. Milestone delay due to complications of the COVID-19 pandemic, challenges in enrolling eligible Medicaid members in the Pilot, challenges in obtaining full consent from interested eligible members, and challenges maintaining engagement and continuity of Pilot services with those households who are fully consented.

### F.10 LMI Portfolio Marketing

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2020 and 2021	<b>Statewide Brand:</b> <ul style="list-style-type: none"> <li>The Program Administrators expect to complete development by the first quarter of 2021</li> </ul>				Complete
2020 and 2021	<b>NY Energy Advisor:</b> <ul style="list-style-type: none"> <li>During Q3 of 2020, the Program Administrators expect to launch an initial version of the NY Energy Advisor website, introducing customers and affordable housing property owners to the current initiative offerings</li> <li>The full NY Energy Advisor website will be launched by end of Q2 2021</li> </ul>				Complete
2020 and 2021	<b>Hard Copy Customer Education Collateral and Multilingual Communications:</b> <ul style="list-style-type: none"> <li>Hard copy customer collateral will be developed in parallel with the online NY Energy Advisor, in order to ensure consistent messaging and calls</li> </ul>				Complete

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
	to action and to streamline development costs				
2020 and 2021	<b>Community-Based Marketing and Paid Advertising:</b> <ul style="list-style-type: none"> <li>Specific media and paid advertising approaches will be developed and coordinated with the statewide campaign and as initiatives are added/changed in the Portfolio</li> </ul>				Complete
2022		<b>NY Energy Advisor:</b> <ul style="list-style-type: none"> <li>Launch a marketing campaign for the NY Energy Advisor in Q1 2022 that will continue through 2025</li> </ul>			Complete
2022		<b>Hard Copy Customer Education Collateral and Multilingual Communications:</b> <ul style="list-style-type: none"> <li>Develop and distribute to stakeholders hard copy customer collateral beginning in Q1 2022 in parallel with operation of the online NY Energy</li> </ul>			Complete

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
		Advisor, to ensure consistent messaging and calls to action and to streamline development costs. Materials available in multiple languages include posters and fact sheets.			
2022		<b>Community-Based Marketing and Paid Advertising:</b> <ul style="list-style-type: none"> <li>Specific media and paid advertising approaches will be developed and coordinated with the statewide campaign and as initiatives are added/changed in the Portfolio</li> </ul>			Complete
2023		<b>NY Energy Advisor:</b> <ul style="list-style-type: none"> <li>Review NY Energy Advisor analytics, determining effectiveness of marketing campaigns</li> </ul>			In Progress
2023		<b>NY Energy Advisor:</b> <ul style="list-style-type: none"> <li>Make adjustment to paid media campaigns if needed</li> </ul>			In Progress

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
		<b>NY Energy Advisor:</b> <ul style="list-style-type: none"> <li>Continue to support the Program Administrators and stakeholders' efforts to obtain earned media</li> </ul>			In Progress
2023			<b>NY Energy Advisor:</b> <ul style="list-style-type: none"> <li>Leverage campaign learnings from 2022 &amp; 2023 to guide media strategy and improved channel selection</li> </ul>		In Progress
2023			<b>NY Energy Advisor:</b> <ul style="list-style-type: none"> <li>Drive increased quiz starts that will connect customers with assistance programs</li> </ul>		In Progress
2023			<b>NY Energy Advisor:</b> <ul style="list-style-type: none"> <li>Due to successful engagement, targeting for 2024 (beginning in 2023) will see an expansion in Hispanic Audience targeting</li> </ul>		In Progress
2024		<b>NY Energy Advisor:</b> <ul style="list-style-type: none"> <li>Continue to analyze NY Energy Advisor marketing campaigns and make corresponding campaign adjustments</li> </ul>			In Progress

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2024			<b>NY Energy Advisor:</b> <ul style="list-style-type: none"> <li>Continue to identify key opportunities to evolve outreach for both online and offline audiences</li> </ul>		In Progress
2024			<b>NY Energy Advisor:</b> <ul style="list-style-type: none"> <li>Build upon success and learnings to date by leveraging highest-performing paid media placements and expanding language access across channels</li> </ul>		In Progress
2024			<b>NY Energy Advisor:</b> <ul style="list-style-type: none"> <li>Leverage Clean Energy Hub, Community and Partner feedback to create assets, collateral and continue to build awareness for NY Energy Advisor and its solutions for LMI New Yorkers</li> </ul>	<b>NY Energy Advisor:</b> <ul style="list-style-type: none"> <li>Leverage Regional Clean Energy Hubs, Community and Partner feedback to create assets, collateral and continue to build awareness for NY Energy Advisor and its solutions for LMI New Yorkers</li> </ul>	In Progress
2024				<b>NY Energy Advisor:</b> <ul style="list-style-type: none"> <li>Continue to monitor activity and optimize campaign performance to maximize impact.</li> </ul>	In Progress
2025				<b>NY Energy Advisor:</b>	Future

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
				<ul style="list-style-type: none"><li>• Planning for 2025 is currently in-progress</li></ul>	
2025				<b>NY Energy Advisor:</b> <ul style="list-style-type: none"><li>• The Marketing and Outreach plan in 2025 that will mirror the strategy that has worked in 2024 and add in learnings from the DAC-targeted Digital OOH</li></ul>	Future

### F.11 Community-Based Outreach, Education, and Engagement Partnerships

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2020 and 2021	<b>Expansion of Existing LMI Community Partnerships:</b> <ul style="list-style-type: none"> <li>Starting in 2021, the Program Administrators will design the community-based outreach and engagement initiative, with full implementation launch in Q2 2021 to provide timely transition from the current CEEP Program</li> <li>NYSERDA has been engaged with community partners in a co-design process to identify opportunities for improving the reach and impact of an outreach and engagement initiative within disadvantaged communities. This co-design process began in early 2020 and will inform the design of the subsequent community engagement initiative.</li> </ul>				Complete
2020 and 2021	<b>Neighborhood-Based Delivery Model:</b> <ul style="list-style-type: none"> <li>During the balance of 2020, the Program Administrators will assess evaluation results from the</li> </ul>				No Longer Applicable



Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
	existing pilots and determine effectiveness of the neighborhood-based delivery model. If warranted, the Program Administrators will develop a replicable event/implementation plan, including consideration of remote webinar-based platforms as an alternative delivery mechanism to minimize risks associated with large, in-person events. The target for rollout would be Q3 2021.				
2022		<ul style="list-style-type: none"> <li>• The Regional Clean Energy Hub network will be launched in Q3 2022, incorporating input from the 2020 co-design process with community partners to improve the reach and impact of outreach and engagement efforts within disadvantaged communities</li> </ul>			Complete
2023		<ul style="list-style-type: none"> <li>• Hubs fully onboarded in the market and working with local communities to support and streamline program</li> </ul>	<ul style="list-style-type: none"> <li>• Hubs fully operational in the market and working within regions to support and</li> </ul>		In Progress

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
		engagement	streamline program engagement		
2024		<ul style="list-style-type: none"> <li>Hubs to begin launching community campaigns and local pilot programs</li> </ul>			Future
2024				<ul style="list-style-type: none"> <li>Hubs to complete Regional Assessment and Barriers Analysis (RABA) identifying barriers and recommendations to improve DAC/LMI entry into clean energy programs and opportunities</li> </ul>	In Progress
2024				<ul style="list-style-type: none"> <li>Participate in the development of the MyEnergy portal</li> </ul>	In Progress
2024				<ul style="list-style-type: none"> <li>Hubs to complete their Outreach and Equitable Engagement Plans outlining the next two years of program stakeholder engagement</li> </ul>	In Progress
2024				<ul style="list-style-type: none"> <li>Hubs to continue to attend outreach events within Hub regions, provide program referrals to NYSERDA and Non-NYSERDA programs and elevate program feedback to</li> </ul>	In Progress

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
				relevant NYSERDA and Non-NYSERDA program teams	
2024				<ul style="list-style-type: none"> <li>• Hubs to coordinate with Joint Utilities to attend outreach and engagement events, host regular coordination meetings, and elevate utility customer needs</li> </ul>	In Progress
2024				<p>The Collaborative activities to include:</p> <ul style="list-style-type: none"> <li>• Provide input on LMI policy and program initiatives</li> <li>• Identify focus areas and priorities for the Collaborative working groups</li> <li>• Develop engagement guidelines and processes for capturing priorities, directing engagement activities to the Collaborative</li> <li>• Establish a plan for expansion of the Collaborative network to include a larger and more diverse set of DAC stakeholders</li> </ul>	In Progress

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2025				<ul style="list-style-type: none"> <li>• Hubs to begin launching community campaigns and local pilot programs</li> </ul>	Future
2025				<ul style="list-style-type: none"> <li>• Utilize OTDA HEAP contact data to provide targeted outreach</li> </ul>	Future
2025				<ul style="list-style-type: none"> <li>• Launch the expanded Collaborative and a shared portal for collaboration and communication</li> </ul>	Future
2025				<ul style="list-style-type: none"> <li>• The Collaborative will host webinars and events that create shared learning environments on community-centered best practices for equitable program development and implementation</li> </ul>	Future
2025				<ul style="list-style-type: none"> <li>• The Collaborative will support the integration of feedback generated in Hubs' stakeholder forums and Regional Analysis of Barriers Assessments into program and policy design input opportunities</li> </ul>	Future

***Milestones marked as “Delayed” or “No Longer Applicable”***

Due to evolving LMI Portfolio budgets and programs, a replication of the neighborhood-based delivery model as references is no longer considered to be applicable to the utility programs. Learnings from this model could be incorporated into activities with the NYSERDA Regional Clean Energy Hubs.

### F.12 Community-Based Customer Engagement Initiatives

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2022		<b>Community-Based Customer Engagement Initiatives:</b> <ul style="list-style-type: none"> <li>• Central Hudson plans to continue their Community Lighting Program and will distribute LEDs through Food Banks and the United Way starting again in 2022.</li> <li>• Con Edison will continue to offer energy efficiency kits via an opt-in approach to customers participating in Con Edison's Energy Affordability Program (formerly called the Low Income Discount Program) and to collaborate with food pantries to distribute LED lightbulbs.</li> <li>• National Grid will expand their LED Food Bank program to the Albany and Syracuse areas and will increase frequency to twice per year with continued collaboration with NYSEG/RGE</li> <li>• Orange &amp; Rockland will expand their food bank kit offering and will provide energy efficiency kits</li> </ul>			Complete

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
		via an opt-in approach for customers participating in the Company's Energy Affordability Program. Additionally, Orange & Rockland will expand the existing MY ORU Store e-commerce platform to include additional functionality that includes new tools, products, and offerings that will specifically engage and guide LMI customers to make energy-wise decisions for their homes.			
2022		<b>Neighborhood-Based Delivery Model:</b> <ul style="list-style-type: none"> <li>During the balance of 2022, the Program Administrators will assess evaluation results from the existing pilots and determine effectiveness of the neighborhood-based delivery model. If warranted, the Program Administrators will develop a replicable event/implementation plan, including consideration of remote webinar-based platforms as an alternative delivery</li> </ul>			No Longer Applicable

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
		mechanism to minimize risks associated with large, in-person events. This event/outreach strategy would be implemented beginning in 2022 after final evaluation results are determined.			
2023			<b>Community-Based Customer Engagement Initiatives:</b> <ul style="list-style-type: none"> <li>• Utilities to continue to offer, assess, and improve Community-Based Customer Engagement Initiatives (as described in Section 5.3)</li> <li>• Utilities to adopt, assess, and implement strategies for improving customer awareness of and participation in EmPower+ on an individual or collective utility basis</li> </ul>		In Progress
2024			<ul style="list-style-type: none"> <li>• Utilities to continue to offer, assess, and improve Community-Based Customer Engagement Initiatives (as described in Section 5.3)</li> </ul>		In Progress
2024			<ul style="list-style-type: none"> <li>• Utilities to adopt and implement strategies for improving customer awareness of and participation in EmPower+ on an individual or</li> </ul>		In Progress



Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
			collective utility basis		
2025				<ul style="list-style-type: none"> <li>Utilities to continue to offer, assess, and improve Community-Based Customer Engagement Initiatives (as described above in Section 5.3)</li> </ul>	Future
2025				<ul style="list-style-type: none"> <li>Utilities to synthesize lessons learned from prior/current efforts and best practices in advancing customer awareness of and participation in EmPower+ to inform future planning.</li> </ul>	Future
2025				<ul style="list-style-type: none"> <li>Utilities to adopt, assess, and implement strategies for improving customer awareness of and participation in EmPower+ on an individual or collective utility basis, where appropriate and possible.</li> </ul>	Future
2025				<ul style="list-style-type: none"> <li>Utilities to focus on phasing out incentive offerings in this program category and continuing outreach to customers receiving EmPower+ referrals.</li> </ul>	Future

***Milestones marked as “Delayed” or “No Longer Applicable”***

Due to evolving LMI Portfolio budgets and programs, a replication of the neighborhood-based delivery model as references is no longer considered to be applicable to the utility programs. Learnings from this model could be incorporated into activities with the NYSERDA Regional Clean Energy Hubs.

### F.13 Evaluation, Measurement, & Verification Approach

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2022		<ul style="list-style-type: none"> <li>Continued ongoing meetings between Program Administrator VGS teams</li> </ul>			Complete
2022		<ul style="list-style-type: none"> <li>Refine and finalize standardized survey questions to be used when conducting process evaluation research</li> </ul>			Complete
2022		<ul style="list-style-type: none"> <li>Complete 2017-Q1 2019 evaluation of EmPower NY Program, on target to be finished by NYSERDA in Q4 2022</li> </ul>			Complete
2022		<ul style="list-style-type: none"> <li>Begin to develop and implement average existing condition baselines, facilitated through the TRM Management Committee, and identify key LMI measures for further research</li> </ul>	<ul style="list-style-type: none"> <li>Continue to develop and implement average existing condition baselines, facilitated through the TRM Management Committee, and identify key LMI measures for further research (<i>milestone moved from 2022 to 2024</i>)</li> </ul>		Delayed
2022		<ul style="list-style-type: none"> <li>Select EM&amp;V vendor for AMEEP evaluations to be undertaken in 2023</li> </ul>			No Longer Applicable
2022		<ul style="list-style-type: none"> <li>Assess impact of NYS Clean Heat coordination with AMEEP and any resulting evaluation needs</li> </ul>			No Longer Applicable

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2023		<ul style="list-style-type: none"> <li>• Begin EmPower+ evaluation process <i>(milestone moved from 2023 to 2024)</i></li> </ul>			Delayed
2023		<ul style="list-style-type: none"> <li>• Develop the workplan and conduct statewide evaluation for AMEEP, as operated in 2022 <i>(milestone moved from 2023 to 2024)</i></li> </ul>			Delayed
2023			<ul style="list-style-type: none"> <li>• Continue ongoing meetings between Program Administrator VGS teams</li> </ul>		Ongoing
2024			<ul style="list-style-type: none"> <li>• Develop workplan, select EM&amp;V vendor, and conduct statewide evaluation for AMEEP, as initiated in 2023 <i>(milestone moved to 2024 from 2023)</i></li> </ul>		In Progress
2024			<ul style="list-style-type: none"> <li>• Continue to develop and implement average existing condition baselines, facilitated through the TRM Management Committee, and identify key LMI measures for further research <i>(milestone moved to 2024 from 2022)</i></li> </ul>		In Progress

Year	Milestone from 2020 Implementation Plan	Milestone Added or Updated in a 2022 Implementation Plan	Milestone Added or Updated in the 2023 Implementation Plan	Milestone Added or Updated in the 2024 Implementation Plan	Status
2024			<ul style="list-style-type: none"> <li>Begin EmPower+ evaluation process (<i>milestone moved to 2024 from 2023</i>)</li> </ul>		In Progress
2025				<ul style="list-style-type: none"> <li>Complete statewide evaluation for AMEEP and, as needed, begin to coordinate across PAs on program changes based on recommendations</li> </ul>	In Progress
2025				<ul style="list-style-type: none"> <li>Update EmPower+ VGS</li> </ul>	In Progress

***Milestones marked as “Delayed” or “No Longer Applicable”***

The “Begin to develop and implement average existing condition baselines, facilitated through the TRM Management Committee, and identify key LMI measures for further research” milestone originally included for 2022 in the 2022 Implementation Plan has been delayed to 2024, due to Program Administrator strategic prioritization.

The “Select EM&V vendor for AMEEP evaluations to be undertaken in 2023” milestone originally included for 2022 in the 2022 Implementation Plan is “No Longer Applicable” because it has been incorporated into a new milestone for 2024.

The “Assess impact of NYS Clean Heat coordination with AMEEP and any resulting evaluation needs” milestone originally included for 2022 in the 2022 Implementation Plan is “No Longer Applicable” as no evaluation needs related to NYS Clean Heat coordination with AMEEP are anticipated at this time.

The “Begin EmPower+ evaluation process” milestone originally included for 2023 in the 2022 Implementation Plan is “Delayed,” as it is now planned for completion in 2024.

The “Develop the workplan and conduct statewide evaluation for AMEEP, as operated in 2022” milestone originally included for 2023 in the 2022 Implementation Plan is delayed, as the AMEEP evaluation is planned for launch in late 2023.

## Appendix G: Scorecard Program Mapping to Implementation Plan Statewide Categories

This appendix maps individual LMI programs as identified in Program Administrators' quarterly scorecard reporting to Implementation Plan Statewide Categories and Sub-Initiatives.

### G.1 Central Hudson

Statewide Category	Sub-Initiative	Fuel Type Funding Source	2024 Scorecard Program Name	2024 Scorecard Program Code	2023 Scorecard Program Name	2023 Scorecard Program Code	2022 Scorecard Program Name	2022 Scorecard Program Code	2021 Scorecard Program Name	2021 Scorecard Program Code	2020 Scorecard Program Name	2020 Scorecard Program Code
Existing 1-4 Family Homes	EmPower+	Electric	Empower (Electric)	CH-E-L-R-22	Empower (Electric)	CH-E-L-R-22	Empower (Electric)	CH-E-L-R-22				
Existing Affordable Multifamily Buildings	AMEEP	Electric	Clean Heat (CH) & Affordable Multifamily Energy Efficiency Program (AMEEP)	CH-E-L-M-21	Clean Heat (CH) & Affordable Multifamily Energy Efficiency Program (AMEEP)	CH-E-L-M-21	Clean Heat (CH) & Affordable Multifamily Energy Efficiency Program (AMEEP)	CH-E-M-X-21				
Customer Awareness, Outreach & Engagement	Distribution of LEDs through food banks and the United Way	Electric	Community Lighting	CH-E-L-R-26	Community Lighting	CH-E-L-R-26	Community Lighting <sup>135</sup>	CH-E-M-R-5				
Existing 1-4 Family Homes	EmPower+	Gas	Empower (Gas)	CH-G-L-R-23	Empower (Gas)	CH-G-L-R-23	Empower (Gas)	CH-G-L-R-23				

<sup>135</sup> Central Hudson's community lighting program described in the Community-Based Outreach, Education, and Engagement Partnerships section of the Implementation Plan was historically accounted for under market rate programs. Since the initiative was created to support and engage with LMI customers in our service territory, the Community Lighting program was moved under the Statewide LMI Portfolio in 2021. No Incentive or Implementation costs are associated with the Customer Awareness, Outreach & Engagement program as the cost for the measures distributed through this program were incurred as a bulk purchase before the program was incorporated into the LMI portfolio and the program is implemented by partner organizations.

Existing Affordable Multifamily Buildings	AMEEP	Gas	Affordable Multifamily Energy Efficiency Program (AMEEP)	CH-G-L-M-20	Affordable Multifamily Energy Efficiency Program (AMEEP)	CH-G-L-M-20	Affordable Multifamily Energy Efficiency Program (AMEEP)	CH-G-L-M-20				
Customer Awareness, Outreach & Engagement		Gas										



## G.2 Con Edison

Statewide Category	Sub-Initiative	Fuel Type Funding Source	2024 Scorecard Program Name	2024 Scorecard Program Code	2023 Scorecard Program Name	2023 Scorecard Program Code	2022 Scorecard Program Name	2022 Scorecard Program Code	2021 Scorecard Program Name	2021 Scorecard Program Code	2020 Scorecard Program Name	2020 Scorecard Program Code
Existing 1-4 Family Homes	EmPower+	Electric	Empower Electric	CE-E-L-R-32N	Empower Electric	CE-E-L-R-32N	Empower Electric	CE-E-L-R-32N				
Existing Affordable Multifamily Buildings	AMEEP	Electric	Affordable Multifamily Energy Efficiency Program (AMEEP) Electric	CE-E-L-M-5N	Affordable Multifamily Energy Efficiency Program (AMEEP) Electric	CE-E-L-M-5N	Affordable Multifamily Energy Efficiency Program (AMEEP) Electric	CE-E-L-M-5N	Multifamily - LMI	CE-E-L-M-4N	Multifamily - LMI	CE-E-L-M-4N
	Multifamily - LMI		Comprehensive - Affordable Multifamily Energy Efficiency Program (AMEEP) Electric	CE-E-L-M-87N	Multifamily - LMI	CE-E-L-M-4N						
Customer Awareness, Outreach & Engagement	Energy Conservation Kits Program for EAP customers	Electric	Efficiency Starter Program - LMI	CE-E-L-R-14N	Efficiency Starter Program - LMI	CE-E-L-R-14N	Efficiency Starter Program - LMI	CE-E-L-R-14N	Efficiency Starter Program - LMI	CE-E-L-R-14N	Efficiency Starter Program - LMI	CE-E-L-R-14N
	Food banks LED distribution		Retail Lighting – LMI	CE-E-L-R-25N	Retail Lighting – LMI	CE-E-L-R-25N	Retail Lighting - LMI	CE-E-L-R-25N	Retail Lighting - LMI	CE-E-L-R-25N	Retail Lighting - LMI	CE-E-L-R-25N
	Smart Kids		Smart Kids	CE-E-L-R-27N	Smart Kids	CE-E-L-R-27N						
	Home Energy Reports				Residential Home	CE-E-L-R-17N					Residential Home	CE-E-L-R-17N

					Energy Reports - LMI						Energy Reports - LMI	
Existing 1-4 Family Homes	EmPower+	Gas	Empower Gas	CE-G-L-R-32N	Empower Gas	CE-G-L-R-32N	Empower Gas	CE-G-L-R-32N				
Existing Affordable Multifamily Buildings	AMEEP	Gas	Affordable Multifamily Energy Efficiency Program (AMEEP) Gas	CE-G-L-M-5N	Affordable Multifamily Energy Efficiency Program (AMEEP) Gas	CE-G-L-M-5N	Affordable Multifamily Energy Efficiency Program (AMEEP) Gas	CE-G-L-M-5N	Multifamily - LMI	CE-G-L-M-4N	Multifamily - LMI	CE-G-L-M-4N
	Multifamily - LMI	Gas	Comprehensive - Affordable Multifamily Energy Efficiency Program (AMEEP) Gas	CE-G-L-M-87N	Multifamily - LMI	CE-G-L-M-4N						
		Gas			NYCHA Program	CE-G-L-M-9N						
Customer Awareness, Outreach & Engagement	Energy Conservation Kits Program for EAP customers	Gas	Efficiency Starter Program - LMI	CE-G-L-R-14N	Efficiency Starter Program - LMI	CE-G-L-R-14N	Efficiency Starter Program - LMI	CE-G-L-R-14N	Efficiency Starter Program - LMI	CE-G-L-R-14N	Efficiency Starter Program - LMI	CE-G-L-R-14N
	Home Energy Reports										Residential Home Energy Reports - LMI	CE-G-L-R-17N
	Smart Kids		Smart Kids	CE-G-L-R-27N	Smart Kids	CE-G-L-R-27N						

### G.3 National Grid (KEDLI)

Statewide Category	Sub-Initiative	Fuel Type Funding Source	2024 Scorecard Program Name	2024 Scorecard Program Code	2023 Scorecard Program Name	2023 Scorecard Program Code	2022 Scorecard Program Name	2022 Scorecard Program Code	2021 Scorecard Program Name	2021 Scorecard Program Code	2020 Scorecard Program Name	2020 Scorecard Program Code
Existing 1-4 Family Homes	KEDLI HEAT	Gas	Gas LMI - Existing 1-4 Family Homes Program	KL-G-L-R-12	Gas LMI - Existing 1-4 Family Homes Program	KL-G-L-R-12	Gas LMI - Existing 1-4 Family Homes Program	KL-G-L-R-12	Gas LMI - Existing 1-4 Family Homes Program	KL-G-L-R-12	Gas LMI - Existing 1-4 Family Homes Program	KL-G-L-R-12
Existing Affordable Multifamily Buildings	AMEEP	Gas	Gas LMI - Existing Affordable Multifamily Program	KL-G-L-M-13	Gas LMI - Existing Affordable Multifamily Program	KL-G-L-M-13	Gas LMI - Existing Affordable Multifamily Program	KL-G-L-M-13				
Customer Awareness, Outreach & Engagement	Customer Awareness, Outreach, & Engagement Program	Gas	Gas LMI - Customer Awareness, Outreach, & Engagement Program	KL-G-L-R-10	Gas LMI - Customer Awareness, Outreach, & Engagement Program	KL-G-L-R-10	Gas LMI - Customer Awareness, Outreach, & Engagement Program	KL-G-L-R-10				

#### G.4 National Grid (KEDNY)

Statewide Category	Sub-Initiative	Fuel Type Funding Source	2024 Scorecard Program Name	2024 Scorecard Program Code	2023 Scorecard Program Name	2023 Scorecard Program Code	2022 Scorecard Program Name	2022 Scorecard Program Code	2021 Scorecard Program Name	2021 Scorecard Program Code	2020 Scorecard Program Name	2020 Scorecard Program Code
Existing 1-4 Family Homes	EmPower+	Gas	Gas LMI - Existing 1-4 Family Homes Program	KN-G-L-R-12	Gas LMI - Existing 1-4 Family Homes Program	KN-G-L-R-12	Gas LMI - Existing 1-4 Family Homes Program	KN-G-L-R-12				
Existing Affordable Multifamily Buildings	AMEEP	Gas	Gas LMI - Existing Affordable Multifamily Program	KN-G-L-M-13	Gas LMI - Existing Affordable Multifamily Program	KN-G-L-M-13	Gas LMI - Existing Affordable Multifamily Program	KN-G-L-M-13				
Customer Awareness, Outreach & Engagement	Customer Awareness, Outreach, & Engagement Program	Gas	Gas LMI - Customer Awareness, Outreach, & Engagement Program	KN-G-L-R-10	Gas LMI - Customer Awareness, Outreach, & Engagement Program	KN-G-L-R-10	Gas LMI - Customer Awareness, Outreach, & Engagement Program	KN-G-L-R-10				

## G.5 National Fuel Gas

Statewide Category	Sub-Initiative	Fuel Type Funding Source	2024 Scorecard Program Name	2024 Scorecard Program Code	2023 Scorecard Program Name	2023 Scorecard Program Code	2022 Scorecard Program Name	2022 Scorecard Program Code	2021 Scorecard Program Name	2021 Scorecard Program Code	2020 Scorecard Program Name	2020 Scorecard Program Code
Existing 1-4 Family Homes	EmPower+	Gas	EmPower	NF-G-LMI-R-3J	EmPower	NF-G-LMI-R-3J	EmPower	NF-G-LMI-R-3J	EmPower	NF-G-LMI-R-3J	EmPower	NF-G-LMI-R-3J
Existing Affordable Multifamily Buildings	AMEEP	Gas	Affordable Multifamily Energy Efficiency Program (AMEEP)	NF-G-LMI-R-4J	Affordable Multifamily Energy Efficiency Program (AMEEP)	NF-G-LMI-R-4J	Affordable Multifamily Energy Efficiency Program (AMEEP)	NF-G-LMI-R-4J				
Customer Awareness, Outreach & Engagement <sup>136</sup>		Gas										

<sup>136</sup> National Fuel Gas's weatherization kits program described in the Community-Based Outreach, Education, and Engagement Partnerships section of the IP does not report savings. Spend is included as part of Market Rate Portfolio Administration.

## G.6 New York State Energy Research & Development Authority

Statewide Category	Sub-Initiative	Fuel Type Funding Source	2024 Scorecard Program Name	2024 Scorecard Program Code	2023 Scorecard Program Name	2023 Scorecard Program Code	2022 Scorecard Program Name	2022 Scorecard Program Code	2021 Scorecard Program Name	2021 Scorecard Program Code	2020 Scorecard Program Name	2020 Scorecard Program Code
Existing 1-4 Family Homes	EmPower+		Single Family- Low income	ND-E-L-R-65	Single Family- Low income	ND-E-L-R-65	Single Family- Low income	ND-E-L-R-65	Single Family- Low income	ND-E-L-R-65	Single Family- Low income	ND-E-L-R-65
	AHP		Single Family- Moderate Income	ND-E-L-R-66	Single Family- Moderate Income	ND-E-L-R-66	Single Family- Moderate Income	ND-E-L-R-66	Single Family- Moderate Income	ND-E-L-R-66	Single Family- Moderate Income	ND-E-L-R-66
Existing Affordable Multifamily Buildings	Multi-Year Affordable Housing Partnerships, Technical Assistance for Affordable Multifamily Buildings		LMI Multifamily	ND-E-L-M-28a; ND-E-L-M-28b	LMI Multifamily	ND-E-L-M-28a; ND-E-L-M-28b	LMI Multifamily	ND-E-L-M-28a; ND-E-L-M-28b	LMI Multifamily	ND-E-L-M-28a; ND-E-L-M-28b	LMI Multifamily	ND-E-L-M-28a; ND-E-L-M-28b
	RetrofitNY		RetrofitNY-LMI	ND-E-L-M-61	RetrofitNY-LMI	ND-E-L-M-61	RetrofitNY-LMI	ND-E-L-M-61	RetrofitNY-LMI	ND-E-L-M-61	RetrofitNY-LMI	ND-E-L-M-61
Affordable New Construction	Affordable New Construction Housing Program		Low Rise New Construction Transition	ND-E-L-R-30	Low Rise New Construction Transition	ND-E-L-R-30	Low Rise New Construction Transition	ND-E-L-R-30	Low Rise New Construction Transition	ND-E-L-R-30	Low Rise New Construction Transition	ND-E-L-R-30
			Multifamily New Construction Transition	ND-E-L-M-39	Multifamily New Construction Transition	ND-E-L-M-39	Multifamily New Construction Transition	ND-E-L-M-39	Multifamily New Construction Transition	ND-E-L-M-39	Multifamily New Construction Transition	ND-E-L-M-39
			New Construction - LMI	ND-E-L-M-42; ND-E-L-R-42	New Construction - LMI	ND-E-L-M-42; ND-E-L-R-42	New Construction - LMI	; ND-E-L-M-42; ND-E-L-R-42	New Construction - LMI	; ND-E-L-M-42; ND-E-L-R-42	New Construction - LMI	ND-E-L-M-42; ND-E-L-R-42

Customer Awareness, Outreach & Engagement	LIFE		Low Income Forum on Energy	ND-E-L-X-32	Low Income Forum on Energy	ND-E-L-X-32	Low Income Forum on Energy	ND-E-L-X-32				
	Regional Clean Energy Hubs		Regional Clean Energy Hubs	ND-E-L-X-88; ND-E-L-X-88A	Regional Clean Energy Hubs	ND-E-L-X-88; ND-E-L-X-88A	Regional Clean Energy Hubs	ND-E-L-X-88; ND-E-L-X-88A				
	REVitalize		REVitalize	ND-E-L-C-64	REVitalize	ND-E-L-C-64	REVitalize	ND-E-L-C-64				
Pilots and Demonstrations	LMI Pilots		LMI Pilots	ND-E-L-X-29	LMI Pilots	ND-E-L-X-29	LMI Pilots	ND-E-L-X-29				
LMI Solar	Solar for All		Solar for All	ND-E-L-X-69	Solar for All	ND-E-L-X-69	Solar for All	ND-E-L-X-69				
Building Electrification	LMI Heat Pump Pilot		Heat Pumps Phase 2	ND-E-L-R-24	Heat Pumps Phase 2	ND-E-L-R-24	Heat Pumps Phase 2	ND-E-L-R-24				
Additional LMI Initiatives	Healthy Homes		Healthy Homes Feasibility Study	ND-E-L-R-22	Healthy Homes Feasibility Study	ND-E-L-R-22	Healthy Homes Feasibility Study	ND-E-L-R-22	Healthy Homes Feasibility Study	ND-E-L-R-22	Healthy Homes Feasibility Study	ND-E-L-R-22
			NYS Healthy Homes Value Based Payment Pilot	ND-E-L-R-48	NYS Healthy Homes Value Based Payment Pilot	ND-E-L-R-48	NYS Healthy Homes Value Based Payment Pilot	ND-E-L-R-48	NYS Healthy Homes Value Based Payment Pilot	ND-E-L-R-48	NYS Healthy Homes Value Based Payment Pilot	ND-E-L-R-48

### G.7 New York State Electric & Gas (NYSEG)

Statewide Category	Sub-Initiative	Fuel Type Funding Source	2024 Scorecard Program Name	2024 Scorecard Program Code	2023 Scorecard Program Name	2023 Scorecard Program Code	2022 Scorecard Program Name	2022 Scorecard Program Code	2021 Scorecard Program Name	2021 Scorecard Program Code	2020 Scorecard Program Name	2020 Scorecard Program Code
Existing 1-4 Family Homes	EmPower+	Electric	LMI 1-4 Family Homes	NS-E-L-R-7	LMI 1-4 Family Homes	NS-E-L-R-7	LMI 1-4 Family Homes	NS-E-L-R-7	LMI Residential Electric	NS-E-L-R-7	LMI Residential Electric	NS-E-L-R-7; NS-E-L-R-7A
Existing Affordable Multifamily Buildings	AMEEP	Electric	The Affordable Multifamily Energy Efficiency Program	NS-E-L-M-87	The Affordable Multifamily Energy Efficiency Program	NS-E-L-M-87	The Affordable Multifamily Energy Efficiency Program	NS-E-L-M-87	LMI-Multifamily Electric Program	NS-E-L-M-6	LMI-Multifamily Electric Program	NS-E-L-M-6; NS-E-L-M-6A
Customer Awareness, Outreach & Engagement	LMI Distribution Program	Electric	LMI Distribution Program	NS-E-L-R-77	LMI Distribution Program	NS-E-L-R-77	LMI Distribution Program	NS-E-L-R-77				
	Retail Products LMI	Electric	Retail Products LMI	NS-E-L-R-75A	Retail Products LMI	NS-E-L-R-75A	Retail Products LMI	NS-E-L-R-75A				
	School Kit Program	Electric	School Kit Program	NS-E-L-R-91	School Kit Program	NS-E-L-R-91						
Existing 1-4 Family Homes	EmPower+	Gas	LMI 1-4 Family Homes	NS-G-L-R-23	LMI 1-4 Family Homes	NS-G-L-R-23	LMI 1-4 Family Homes	NS-G-L-R-23	LMI Residential Gas	NS-G-L-R-23	LMI Residential Gas	NS-G-L-R-23; NS-G-L-R-23A
Existing Affordable Multifamily Buildings	AMEEP	Gas	The Affordable Multifamily Energy Efficiency Program	NS-G-L-M-89	The Affordable Multifamily Energy Efficiency Program	NS-G-L-M-89	The Affordable Multifamily Energy Efficiency Program	NS-G-L-M-89	LMI-Multifamily Gas Program	NS-G-L-M-22	LMI-Multifamily Gas Program	NS-G-L-M-22; NS-G-L-M-22A



Customer Awareness, Outreach & Engagement	LMI Distribution Program	Gas	LMI Distribution Program	NS-G-L-R-79	LMI Distribution Program	NS-G-L-R-79	LMI Distribution Program	NS-G-L-R-79				
	Retail Products LMI	Gas	Retail Products LMI	NS-G-L-R-83A	Retail Products LMI	NS-G-L-R-83A	Retail Products LMI	NS-G-L-R-83A				
	School Kit Program	Gas	School Kit Program	NS-G-L-R-93	School Kit Program	NS-G-L-R-93						

## G.8 National Grid (NMPC)

Statewide Category	Sub-Initiative	Fuel Type Funding Source	2024 Scorecard Program Name	2024 Scorecard Program Code	2023 Scorecard Program Name	2023 Scorecard Program Code	2022 Scorecard Program Name	2022 Scorecard Program Code	2021 Scorecard Program Name	2021 Scorecard Program Code	2020 Scorecard Program Name	2020 Scorecard Program Code
Existing 1-4 Family Homes	EmPower+	Electric	Electric LMI - Existing 1-4 Family Homes Program	NM-E-L-R-16	Electric LMI - Existing 1-4 Family Homes Program	NM-E-L-R-16	Electric LMI - Existing 1-4 Family Homes Program	NM-E-L-R-16				
Existing Affordable Multifamily Buildings	AMEEP	Electric	Electric LMI - Existing Affordable Multifamily Program	NM-E-L-M-17	Electric LMI - Existing Affordable Multifamily Program	NM-E-L-M-17	Electric LMI - Existing Affordable Multifamily Program	NM-E-L-M-17				
Customer Awareness, Outreach & Engagement	LED Food Bank Program	Electric	Electric LMI - Customer Awareness, Outreach, & Engagement Program	NM-E-L-R-14	Electric LMI - Customer Awareness, Outreach, & Engagement Program	NM-E-L-R-14	Electric LMI - Customer Awareness, Outreach, & Engagement Program	NM-E-L-R-14				
Existing 1-4 Family Homes	EmPower+	Gas	Gas LMI - Existing 1-4 Family Homes Program	NM-G-L-R-12	Gas LMI - Existing 1-4 Family Homes Program	NM-G-L-R-12	Gas LMI - Existing 1-4 Family Homes Program	NM-G-L-R-12				
Existing Affordable Multifamily Buildings	AMEEP	Gas	Gas LMI - Existing Affordable Multifamily Program	NM-G-L-M-13	Gas LMI - Existing Affordable Multifamily Program	NM-G-L-M-13	Gas LMI - Existing Affordable Multifamily Program	NM-G-L-M-13				
Customer Awareness, Outreach & Engagement	Customer Awareness, Outreach, & Engagement Program	Gas	Gas LMI - Customer Awareness, Outreach, & Engagement Program	NM-G-L-R-10	Gas LMI - Customer Awareness, Outreach, & Engagement Program	NM-G-L-R-10	Gas LMI - Customer Awareness, Outreach, & Engagement Program	NM-G-L-R-10				

Existing 1-4 Family Homes	EmPower+	Gas	Gas LMI - Existing 1-4 Family Homes Program	NM-G-L-R-12	Gas LMI - Existing 1-4 Family Homes Program	NM-G-L-R-12	Gas LMI - Existing 1-4 Family Homes Program	NM-G-L-R-12				
Existing Affordable Multifamily Buildings	AMEEP	Gas	Gas LMI - Existing Affordable Multifamily Program	NM-G-L-M-13	Gas LMI - Existing Affordable Multifamily Program	NM-G-L-M-13	Gas LMI - Existing Affordable Multifamily Program	NM-G-L-M-13				

### G.9 Orange & Rockland

Statewide Category	Sub-Initiative	Fuel Type Funding Source	2024 Scorecard Program Name	2024 Scorecard Program Code	2023 Scorecard Program Name	2023 Scorecard Program Code	2022 Scorecard Program Name	2022 Scorecard Program Code	2021 Scorecard Program Name	2021 Scorecard Program Code	2020 Scorecard Program Name	2020 Scorecard Program Code
Existing 1-4 Family Homes	EmPower+	Electric			LMI Electric - EmPower	OR-E-M-R-11	LMI Electric - EmPower	OR-E-M-R-11				
Existing Affordable Multifamily Buildings	AMEEP	Electric			LMI Electric - AMEEP	OR-E-M-R-13	LMI Electric - AMEEP	OR-E-M-R-13				
Customer Awareness, Outreach & Engagement	Food Banks, EE Kits, LMI Marketplace	Electric			LMI Electric – Customer Engagement	OR-E-M-R-15	LMI Electric – Customer Engagement	OR-E-M-R-15				
Existing 1-4 Family Homes	EmPower+	Gas			LMI Gas - EmPower	OR-G-M-R-12	LMI Gas - EmPower	OR-G-M-R-12				
Existing Affordable Multifamily Buildings	AMEEP	Gas			LMI Gas - AMEEP	OR-G-M-R-14	LMI Gas - AMEEP	OR-G-M-R-14				
Customer Awareness, Outreach & Engagement	EE Kits, LMI Marketplace	Gas			LMI Gas – Customer Engagement	OR-G-M-R-16	LMI Gas – Customer Engagement	OR-G-M-R-16				

### G.10 Rochester Gas & Electric (RG&E)

Statewide Category	Sub-Initiative	Fuel Type Funding Source	2024 Scorecard Program Name	2024 Scorecard Program Code	2023 Scorecard Program Name	2023 Scorecard Program Code	2022 Scorecard Program Name	2022 Scorecard Program Code	2021 Scorecard Program Name	2021 Scorecard Program Code	2020 Scorecard Program Name	2020 Scorecard Program Code
Existing 1-4 Family Homes	EmPower+	Electric	LMI 1-4 Family Homes	RG-E-L-R-39	LMI 1-4 Family Homes	RG-E-L-R-39	LMI 1-4 Family Homes	RG-E-L-R-39	LMI Residential Electric	RG-E-L-R-39	LMI Residential Electric	RG-E-L-R-39; RG-E-L-R-39A
Existing Affordable Multifamily Buildings	AMEEP	Electric	The Affordable Multifamily Energy Efficiency Program	RG-E-L-M-88	The Affordable Multifamily Energy Efficiency Program	RG-E-L-M-88	The Affordable Multifamily Energy Efficiency Program	RG-E-L-M-88	LMI-Multifamily Electric Program	RG-E-L-M-38	LMI-Multifamily Electric Program	RG-E-L-M-38; RG-E-L-M-38A
Customer Awareness, Outreach & Engagement	Food Banks, Distributions to EAP customer School Kits	Electric	LMI Distribution Program	RG-E-L-R-78	LMI Distribution Program	RG-E-L-R-78	LMI Distribution Program	RG-E-L-R-78				
	LMI Retail Products	Electric	Retail Products LMI	RG-E-L-R-76A	Retail Products LMI	RG-E-L-R-76A	Retail Products LMI	RG-E-L-R-76A				
	School Kit Program	Electric	School Kit Program	RG-E-L-R-92	School Kit Program							
Existing 1-4 Family Homes	EmPower+	Gas	LMI 1-4 Family Homes	RG-G-L-R-55	LMI 1-4 Family Homes	RG-G-L-R-55	LMI 1-4 Family Homes	RG-G-L-R-55	LMI Residential Gas	RG-G-L-R-55	LMI Residential Gas	RG-G-L-R-55; RG-G-L-R-55A
Existing Affordable Multifamily Buildings	AMEEP	Gas	The Affordable Multifamily Energy Efficiency Program	RG-G-L-M-90	The Affordable Multifamily Energy Efficiency Program	RG-G-L-M-90	The Affordable Multifamily Energy Efficiency Program	RG-G-L-M-90	LMI-Multifamily Gas Program	RG-G-L-M-54	LMI-Multifamily Gas Program	RG-G-L-M-54; RG-G-L-M-54A
Customer Awareness, Outreach & Engagement	LMI Distribution Program	Gas	LMI Distribution Program	RG-G-L-R-80	LMI Distribution Program	RG-G-L-R-80	LMI Distribution Program	RG-G-L-R-80				

	Retail Products LMI	Gas	Retail Products LMI	RG-G-L-R-84A	Retail Products LMI	RG-G-L-R-84A	Retail Products LMI	RG-G-L-R-84A				
	School Kit Program	Gas	School Kit Program	RG-G-L-R-94	School Kit Program	RG-G-L-R-94						