

Affordable Multifamily Program Upstate (AMP Up)

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NYSERDA Multifamily Team

2016-2025: Clean Energy Fund Portfolio

Utilities (Statewide)

Affordable Multifamily Energy Efficiency Program (AMEEP)
Upstate applications closed on 10/31/25
Downstate will continue

2026-2030 LMI Energy Efficiency/Building Electrification Portfolio (EE/BE)

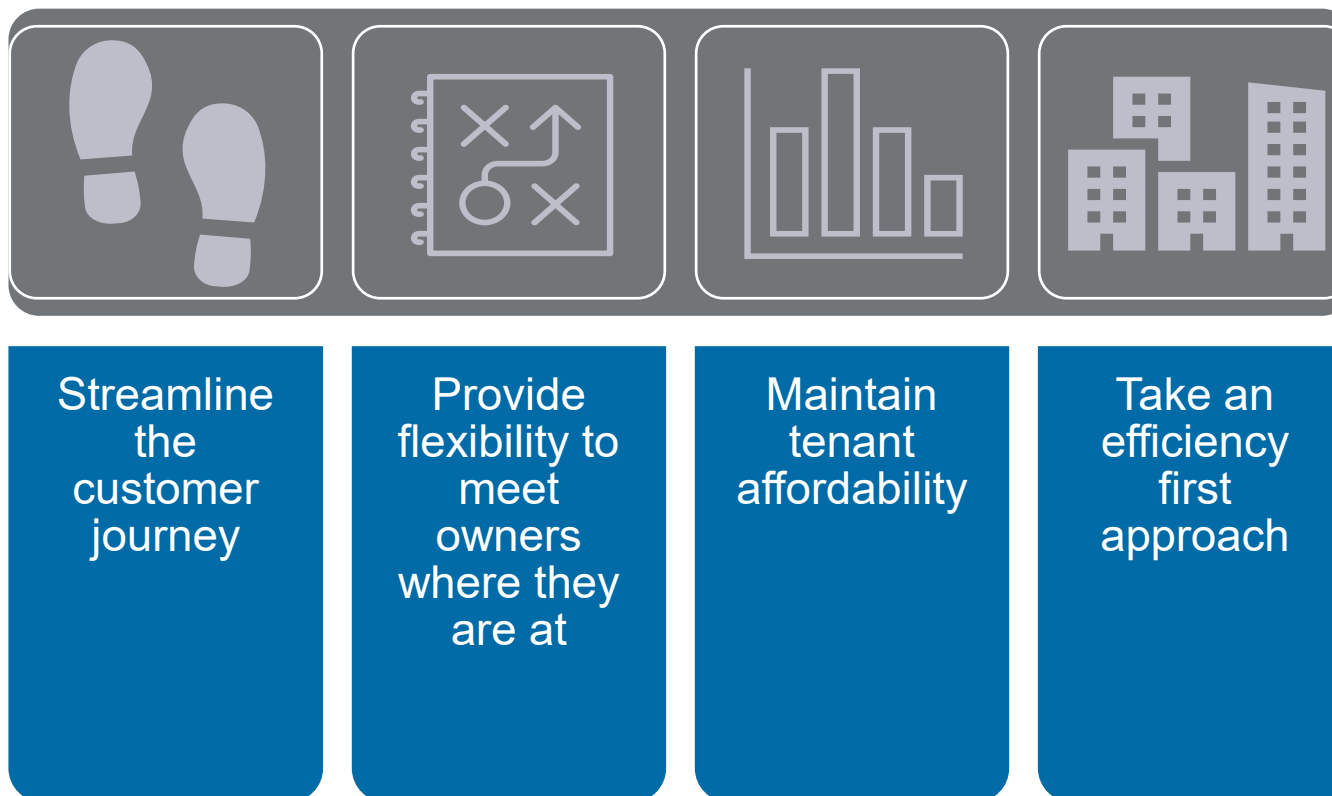
Con Edison & National Grid (Downstate)

Affordable Multifamily Energy Efficiency Program (AMEEP)

NYSERDA (Upstate)

AMP Up
Launch Date Q1 2026

Based on Stakeholder feedback, the Multifamily Team at NYSERDA has the following program goals:



Core program at launch

Mid-cycle

Regulated projects with financing and regulatory agreements from housing agencies; mid-financing term

Naturally occurring affordable

Very common in smaller multifamily buildings

Existing Networks

- MREP
- Owner's Rep
- Clean Energy Hubs
- Community Based Organizations

Offerings

- Technical assistance and end-use incentives
- Concierge service to shepherd projects
- Resiliency enhancement incentives

Support for difficult to develop DAC pipelines

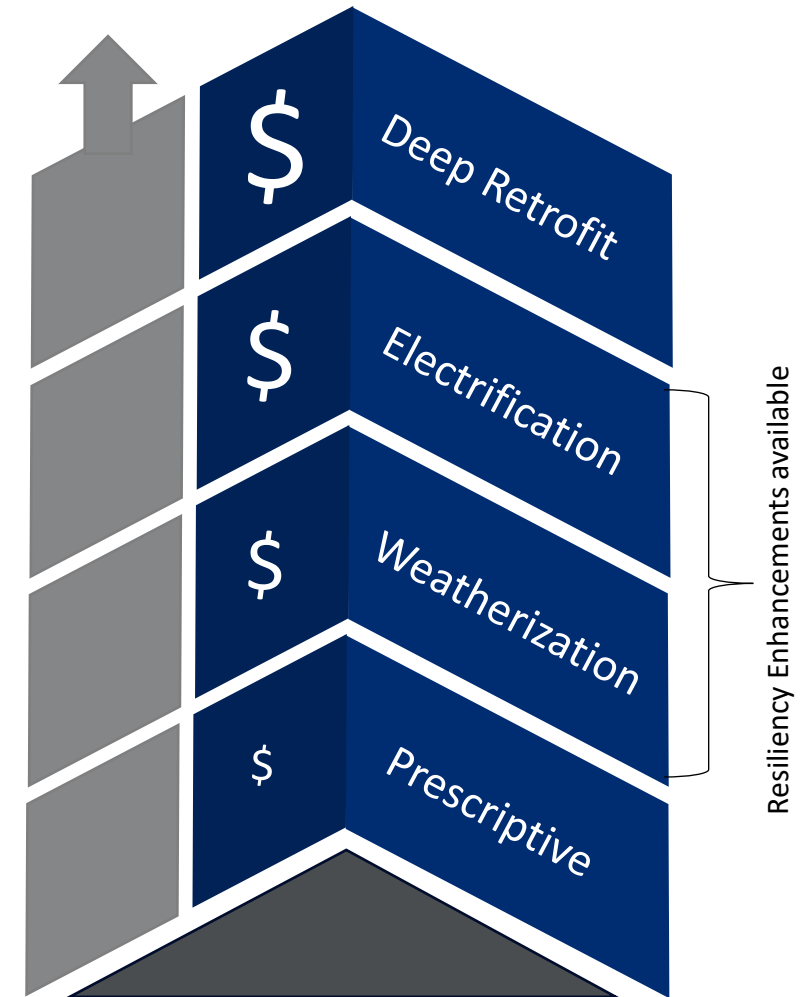
PHA Pathway

- Offers robust technical assistance
- Participation in Facilitated Workshops
- Assist with funding
- Offer Concierge service for application submission and project management

Launched August 2025

Launching in 2026

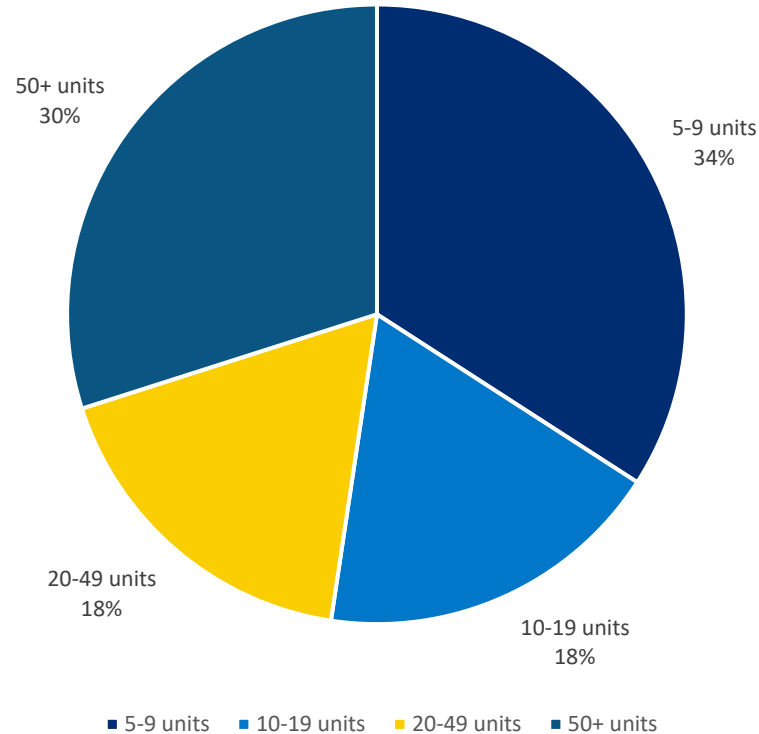
- Expected to offer upstate multifamily buildings with incentives for energy efficiency and building electrification upgrades
- Program will feature a streamlined customer journey with embedded technical assistance and will offer a concierge service
 - For the purposes of this program, technical assistance is defined as the building assessment or audit, whichever is required to comply with the program requirements.



- **Must be in the Upstate region of NYS**
 - Upstate is defined as any property *north of* Con Edison service territory
- **Must pay into the System Benefits Charge on either electric or gas utility bill**
- **Project must consist of one or more existing multifamily buildings that have been in operation for >12 months**
 - Mixed use buildings are allowed, but 50% of the GHSF must be residential or residentially associated.
- **Project must have a total of 5 or more units**
 - Any project with >150 units must receive prior approval to submitting application
- **Must meet LMI criteria**
 - For buildings up to 10 units: 50% or more of the building must be $\leq 80\%$ AMI or SMI, whichever is higher
 - For buildings with 11+ units: 25% of the building must be $\leq 80\%$ AMI or SMI, whichever is higher
- **Must use a MREP contractor or participate in Concierge Service**

~254K units

Upstate LMI Buildings by Units



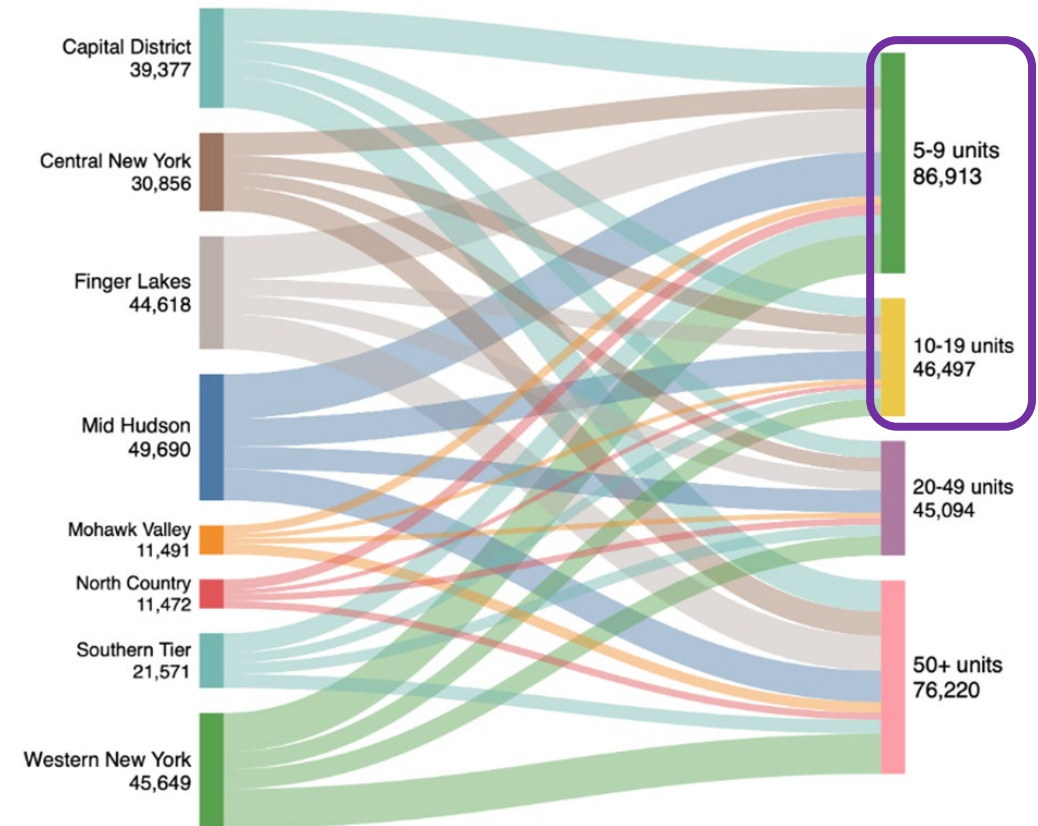
Small Building Obstacles:

- >50% of upstate LMI multifamily building stock has <20 units
- Small multifamily buildings are often below 3-stories
 - They typically need more technical support
 - They offer little economies of scale
 - They can be difficult to reach
- Contractors tend to focus on larger properties

Low-Rise Pathway:

Better targeting and support for small multifamily buildings:

- Available for projects with 5-20 units and are 1-3 stories
- Utilize local actors to engage small building owners
 - Clean Energy Hubs
 - CBO's
- Provide Concierge Service for Support Services
- Streamlined alternative to modeling using Clarity Compass Tool
- **85%** Incentive Cost Cap (vs 70%)
- Greater portion of incentives in initial payment milestone



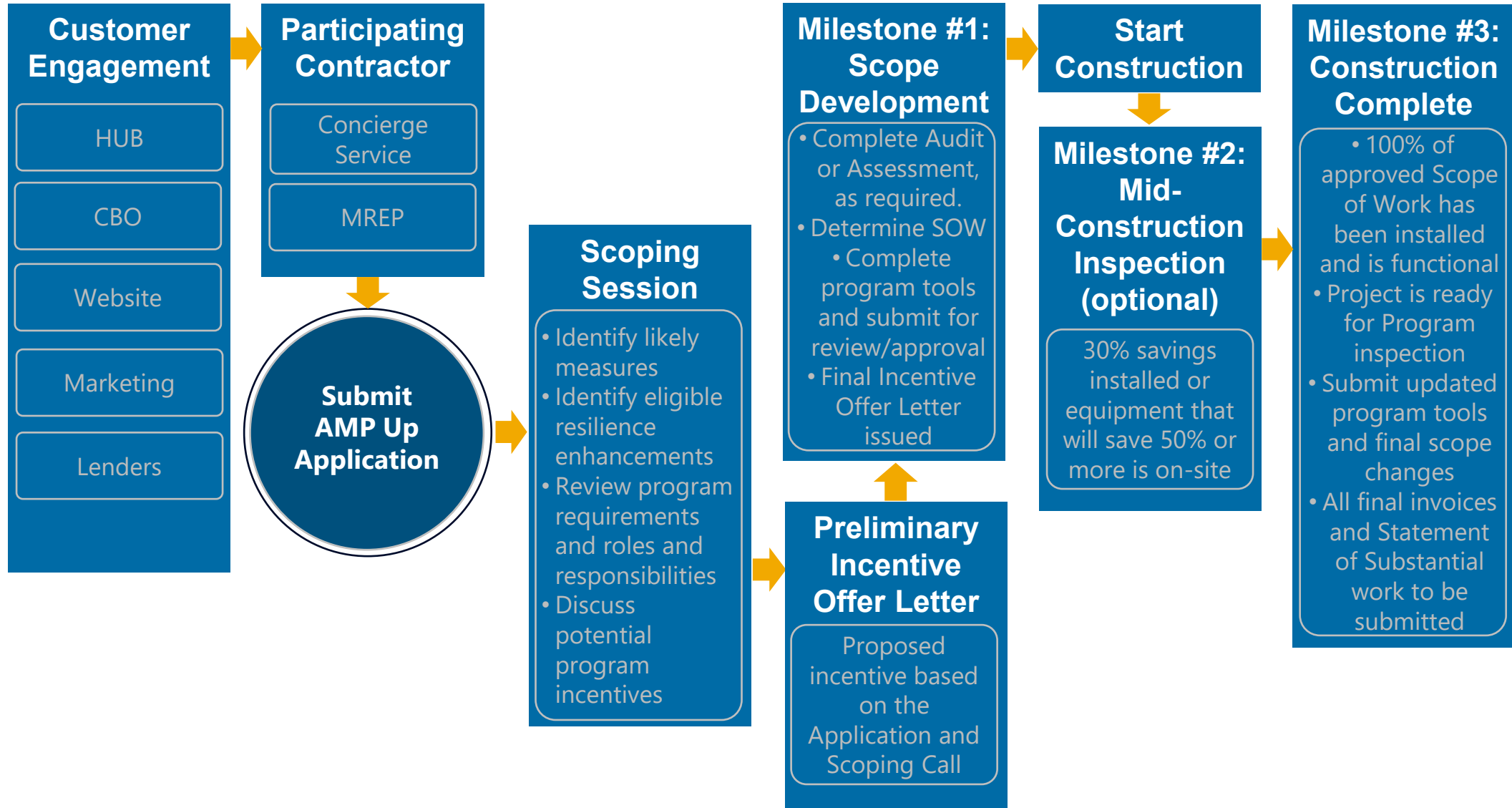
Complimentary Concierge Service

- Program Application and Compliance
- Building Assessment/Audit
- Project Scoping
- Capital Funding Guidance/Analysis
- Contractor Selection Support
- Construction Monitoring
- Project Close Out
- Services provided through Owner's Representative program offering, incentive caps may apply

MREP

- Program Application and Compliance
- Building Assessment/Audit (no cost to applicant)
- Project Scoping
- Construction Monitoring for program compliance
- Project Close Out

Customer Journey



Incentive Schedule

Incentive Category		Incentive	Milestone #1 ⁴ (Scope Development)	Milestone #2 (Partial Construction – optional)	Milestone #3 (Construction Complete)
End-Use Incentives ¹	Prescriptive	\$TBD/Unit	50% (5-20 units) or 25% (21+ units)	25% (5-20 units) or 40% (21+ units)	25% (5-20 units) or 35% (21+ units)
	Weatherization	\$TBD/Unit			
	Electrification	\$TBD/Unit			
	Deep Retrofit	\$TBD/Unit			
Resiliency Enhancements ²		Varies	n/a	n/a	100%
Technical Assistance ³		Up to 100%	75% at Milestone #1 approval 25% at construction start		

1. End Use incentive cost caps are set at 85% for Low-Rise Pathway and 70% for all other projects.
2. Resiliency Enhancement incentives vary dependent on which resiliency options are selected. More information can be found in the Program Manual.
3. Technical Assistance costs count toward the overall project incentive cost cap.
4. Combined Milestone #1 incentives cannot exceed total end-use incentives.

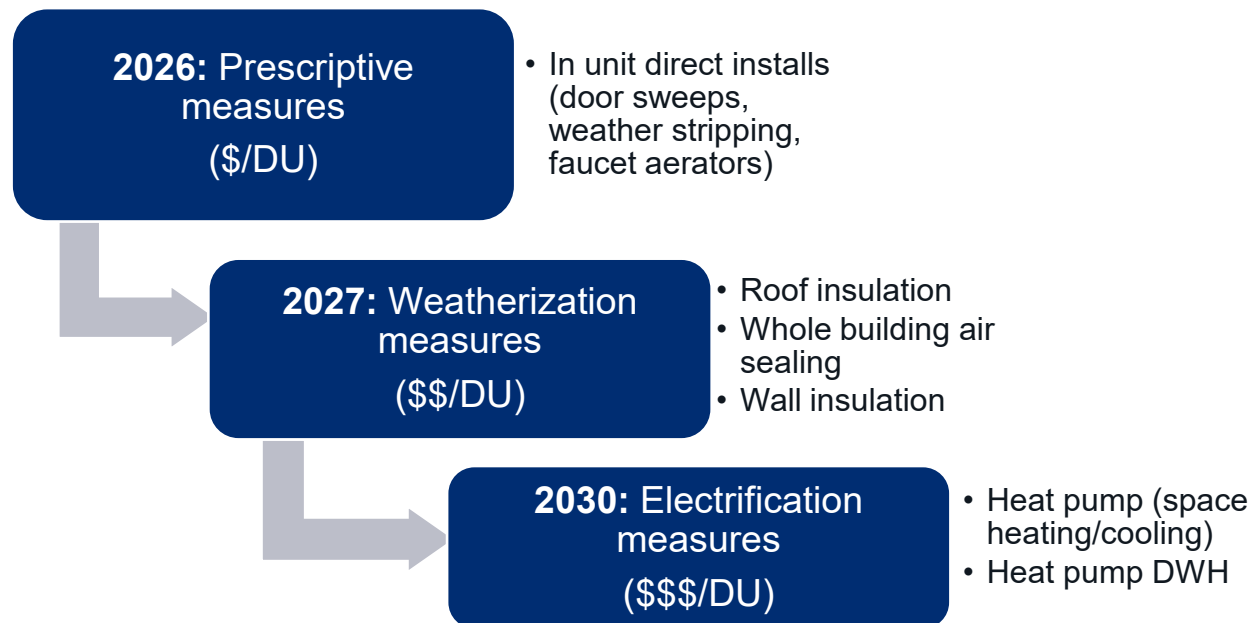
Program details are subject to change before official launch.

Eligible Measures

Measure Category	Measure
Prescriptive	<ul style="list-style-type: none"> Occupancy Sensors Door Weatherstripping Low-Flow Showerheads Low-Flow Faucet Aerators Thermostatic Shower Restriction Valves DHW Pipe Insulation Room AC Refrigerators (w/Freezer) Thermostatic Radiator Valves Smart Thermostatic Radiator Enclosures Steam Trap Boiler/Furnace Tune-Up
Weatherization	<ul style="list-style-type: none"> Roof Insulation Attic Access Insulation Air-sealing Basement Insulation Heating & Cooling Pipe Insulation Wall Insulation Duct Sealing Duct Insulation Exterior Doors Window Replacement

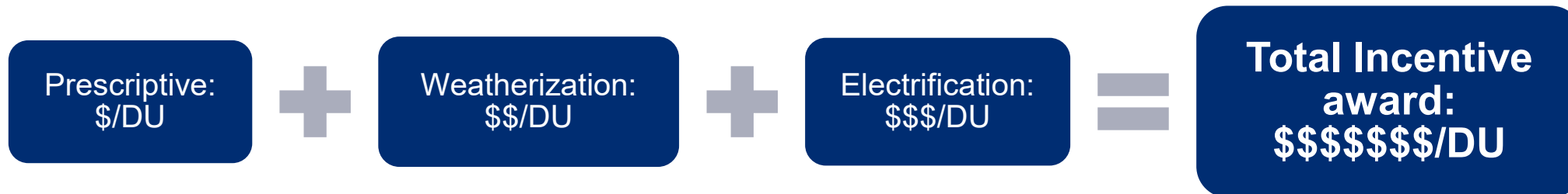
Measure Category	Measure
Electrification	<ul style="list-style-type: none"> H&C Heat Pumps DHW Heat Pumps
Deep Retrofit	<ul style="list-style-type: none"> Advanced Ventilation with Heat Recovery Envelope Over-cladding
Resiliency Enhancements	<ul style="list-style-type: none"> H&C Heat Pump Floodproofing DHW Heat Pump Floodproofing Electrical Panel Elevation Electrification for Heat Vulnerable Population Hurricane Resistant Windows

Phased Scopes and Measure Stacking



- Buildings allowed to enter **AMP Up** multiple times
 - New scopes of work may be considered for a building for additional incentives
- A building cannot receive additional incentives for a scope of work previously completed for the same measure category

Comprehensive scope with layered incentive tiers



5-MINUTE BREAK





NYSERDA Affordable Multifamily Program – Upstate (AMP Up)

Energy Assessment & Scoping Tool (EAST)

December 22, 2025



NYSERDA

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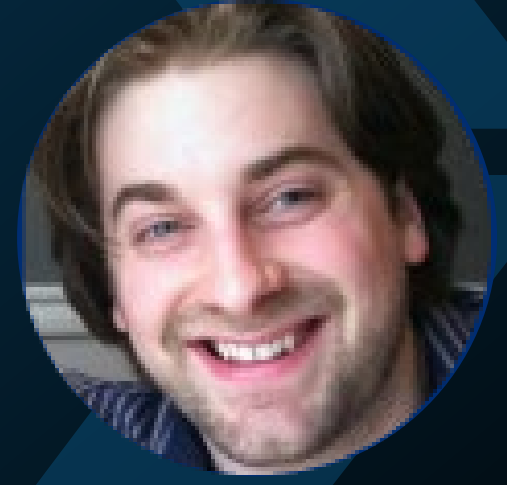
Meet the TRC Team



Sara Fletcher
Project Manager



Caner Kilinc
Lead Developer



Eric Readdy
Director



Agenda

AMP Up / EAST Overview

- Program / EAST-Related Terminology
- EAST Overview
- Project / EAST Workflow

EAST User Guidance

- Structure & Function
- Proper Use & Best Practices
- Project Information & Scoping Tabs
- Measure & Project QC Tabs
- Project Summary
- Salesforce Data Export

Live Tool Walkthrough

Q&A

Wrap-Up & Next Steps

AMP Up / EAST Overview





AMP Up / EAST Overview

Program / EAST-Related Terminology



- **AMP Up:** Affordable Multifamily Program – Upstate
- **EAST:** Energy Assessment & Scoping Tool
- **LMI:** Low-to-Moderate Income
 - Multiple pathways for demonstrating income eligibility – see program guidelines for details
- **DAC:** Disadvantaged Community
- **PSD Clarity Compass:** Small Multifamily Tool
 - Used for modeling electrification and deeper retrofit scopes for projects with 20 units or less
 - Separate trainings provided
- **Salesforce:** Online application submittal system
 - Only Participating Contractors can submit applications through Salesforce
 - EAST includes export functionality that prepares a csv file that will load into Salesforce



AMP Up / EAST Overview

Program / EAST-Related Terminology



- **NYS TRM:** New York State Technical Resource Manual
 - Documents standard approaches for estimating energy savings for prescriptive EE/BE measures
- **VBA/Macros:** Visual Basic for Applications
 - EAST is equipped with macros leveraging VBA scripts for improved user experience and automation
- **Energy Assessment:** Site visit to collect key project information, inventory energy using equipment, and assess EE/BE potential
 - ASHRAE Level 1 (walkthrough) required for Prescriptive and Weatherization scope
 - ASHRAE Level 2 (audit) required for Electrification and Deeper Retrofit scope
- **Modeling Results:** Modeled energy savings using program approved simulation software
 - EAST shall be populated with output for proposed scope
 - PSD Clarity Compass used for small buildings (≤ 20 units)



AMP Up / EAST Overview

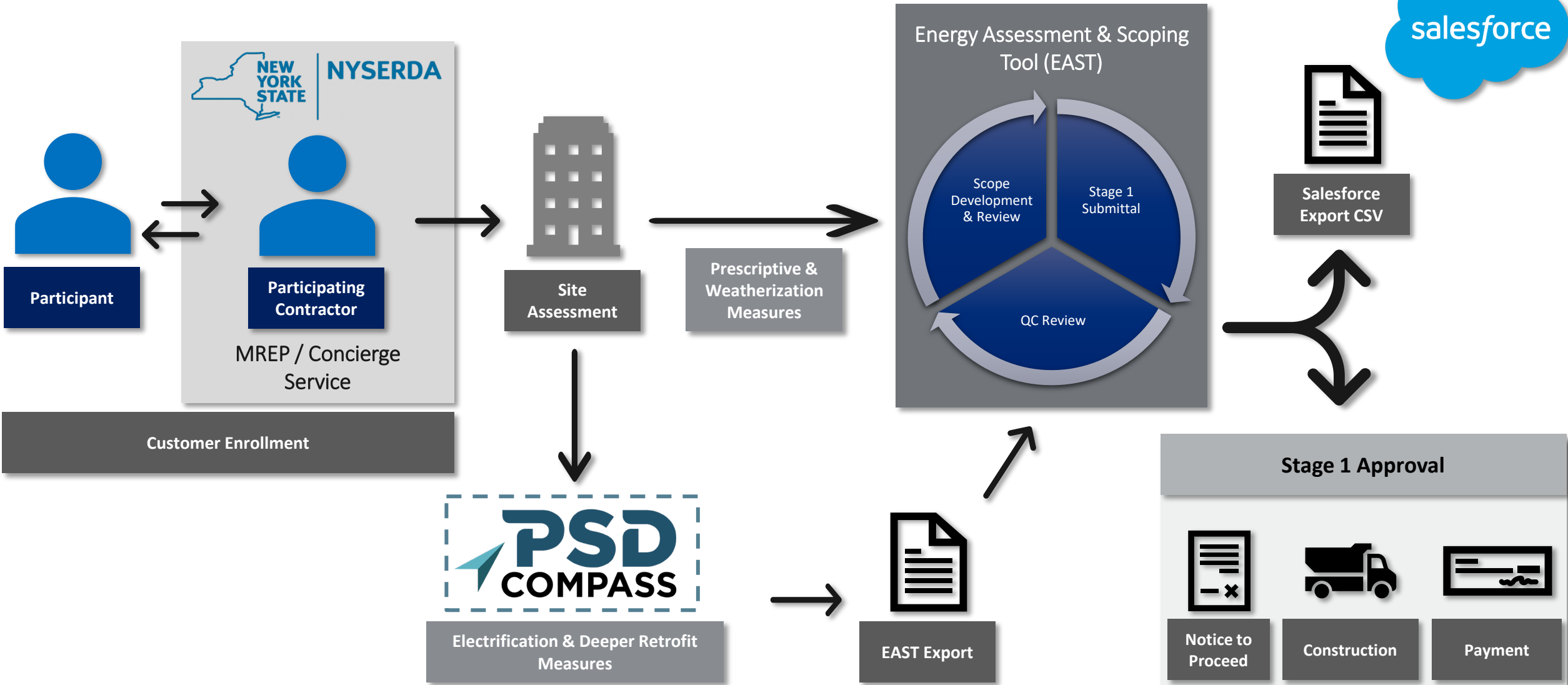
EAST Overview



- Multi-tabbed, Macro-enabled Excel workbook designed for AMP Up project scoping, review, and reporting
- Required submittal for all program pathways / work scopes
 - One EAST per project
 - One EAST may cover multiple buildings
 - One EAST may cover multiple assessments
- Central hub of AMP Up project workflow
- Collects key information for project / measure eligibility assessment, MPS compliance, and QA/QC
- Calculates gross-verified site energy savings in accordance with NYS TRM for Prescriptive & Weatherization scope
- Aggregates modeling results (Compass / Other Simulation Software) for Electrification & Deeper Retrofit scope
- Successor to SAV-IT and its predecessors used in other NYSERDA MF programs

AMP Up / EAST Overview

Project / EAST Workflow



EAST User Guidance



Structure & Function

Energy Assessment & Scoping Tool (EAST) Version 1.0



The Energy Assessment & Scoping Tool (EAST) assists you in the development of energy efficiency project workscopes for the Multifamily Residential Energy Pathways.

Proceed to the Instructions tab for information on proper use of this tool.

Release Date: **03/01/2025**

NYSERDA - New York State Energy Research & Development Authority

- Multi-tabbed, Macro-enabled Excel workbook
- Color-coded tabs, organized in order of intended completion
- Locked and password-protected to prevent inadvertent modification of structure, supporting calculations, prescribed values, etc.
- Functionality requires use of Excel 2019 or later
- Macros must be enabled to access VBA functions

Welcome

Instructions

General Project Info

Utility Info

Measure Calculations

PSD input

PSD Savings

Resiliency Measures

Existing Conditions

Proper Use & Best Practices

- Familiarize yourself with incentive structure, eligible measures list, program and measure eligibility rules and guidelines, and prescribed TRM methods for eligible measures (and EAST!)
- Carefully review inputs and outputs to ensure accuracy and reasonableness
 - e.g., review total estimated savings relative to annual usage data

Proper Use & Best Practices

EAST Tabs / Worksheets

- Welcome
- Instructions
- General Project Info
- Utility Info
- Measure Calculations
- PSD/Modeled Measures
- Existing Conditions
- Resiliency
- Measure Summary
- Measure QC
- QC Check
- QC Feedback
- Project Summary

Order of Completion

- General Project Information and Utility Information, shall be completed first
- If applicable, complete Measure Calculations for Prescriptive and Weatherization measures that have not been modeled
- If applicable, copy/paste PSD Inputs & PSD Savings tabs (Clarity Compass model only) or enter upgrade details in the Modeled Measures tab (other modeling software only) for Electrification and Deeper Retrofit upgrades and Weatherization upgrades that have been modeled
- Existing Conditions shall be completed next
- If applicable, complete the Resiliency tab
- Review Measure QC tab for measure-level QC flags
- Review QC Check tab for project-level QC flags
- [Post NYSERDA-Review] Review and respond to QC Feedback Reviewer Comments and resubmit

*General Rule: Worksheets should be completed from left-to-right, top-to-bottom.

Proper Use & Best Practices

Hover-over Field Notes

- Some field headings include hover-over notes providing input guidance. Tabs include Note reset/resize/hide buttons.

Reset Note Position Resize Notes Hide Notes

Envelope			
General Building/Envelope Description	List each material layer type and thickness		
Envelope Components	Construction Description	Total R-Value	Verification method
Above Grade Exterior Walls			

Field Color Coding

- EAST cells are color-coded to indicate proper use / content

Color Coding	Meaning
Orange	Required field for tool functionality
Sky Blue	Required field for project acceptance
Light Orange	Optional Field
White	Calculated field
Hashed Out	Field not applicable based on selected fields

Spell Check

- Many tabs with open fields for entering data include “Spell Check” compatibility via buttons within the tab. Macros must be enabled for the Spell Check buttons to function.

Measure Descriptions
Instructions

Spell Check

1) Provide detailed descriptions of all measures proposed under the project's workscope.

General Project Info

- Includes user inputs for high-level project information, including
 - Participant and Contractor Contact Details
 - Project Location and Classification
 - Project Size and Occupancy
 - Site Assessment Details
 - Information on Modeling (if applicable)

General Project Information	
Multifamily Residential Energy Pathways Participating Contractor Information	
Participating Contractor Name	
Participating Contractor Street Address	
Participating Contractor City and State	
Participating Contractor Zip Code	
Participating Contractor Contact Name	
Participating Contractor Email	
Participating Contractor Phone Number	
Project Information	
Project Name	
Project Primary Street Address	
Project City	
Project Zip Code	
Project County	
Population Type (seniors, families, etc.)	
If the project is 50 units or less, is it subject to Local Law 87?	

General Project Info

- Includes user inputs prompting Upgrade Types and model programs used, if applicable.
- Downstream tabs unhide based on inputs
 - Measure Calculations
 - *Prescriptive and/or Weatherization upgrades that have not been modeled*
 - PSD input and PSD Savings
 - *Modeling using Clarity Compass*
 - Modeled Measures
 - *Modeling with other modeling software*
 - Resiliency
 - *Resiliency Upgrades*

Measure Calculation Information	
Will the project include measures that will utilize prescriptive TRM calculations?	Yes
Was modeling software used?	Yes - Clarity Compass Only
Modeling Software Used	Yes - Clarity Compass Only
Modeling Software Version Used	Yes - Other
Electrification Information	
	No

Resiliency	
Will the project have Resiliency Upgrades?	No
Eligible for flood resilience enhancement?	

Utility Info

- Collects utility provider details for all fuel types
- Establishes pre-construction usage and costs
- Provides inputs for consumption disaggregation
 - Heating
 - Cooling
 - Baseload
- Includes optional true-up for model calibration

Utility Information

Instructions

1) If entering information for the OPTIONAL Model True-Up, please do so in the table below in I12:O30.

UTILITY INFORMATION						
	Electric	Gas	Fuel Oil	Steam	Propane	Select Other Fuel Type...
Utility Company						
3rd Party Supplier						
Metering Configuration						

ALL INFORMATION ENTERED IN THE TABLE BELOW SHOULD COME DIRECTLY FROM THE PROJECT'S ENERGY USE SNAPSHOT REPORT.

PRE-CONSTRUCTION ENERGY USAGE & COST					
Fuel Type	Site-Source Ratio	Pre-Construction Site MMBtu	Pre-Construction Source MMBtu	Energy Cost	Energy Cost Unit
Electricity	2.55		0.00		per kWh
Natural Gas	1.05		0.00		per MMBtu
Fuel Oil	1.01		0.00		per MMBtu
Steam	1.45		0.00		per MMBtu
Propane	1.01		0.00		per MMBtu
Select Other Fuel Type...			0.00		per MMBtu
Total		0.00	0.00		

Existing Conditions

- Collects information on existing MEP, envelope, appliance, etc. equipment required for program compliance
- The following tables must be completed for every project:
 - ● Envelope
 - ● Envelope Components
 - ● Windows
 - ● Exterior Doors
 - ● Air Infiltration
 - ● Mechanical Systems
 - ● Heating Components
 - ● Cooling Components
 - ● Distribution Systems
 - ● Temperature Measurements
 - ● Ventilation
- Documentation is required on all building systems improved by AMP Up scope
- Sections of the Existing Conditions tab are automatically unhidden based on indication of inclusion in scope on Measure Descriptions tab

Measure Summary

- Summarizes all upgrades entered across upstream EAST input tabs
- Conducts and provides financial analysis on in-scope measures
- Aggregates total scope predicted energy and economic performance

Detailed Cost and Savings Summary for Proposed Measures

Instructions

- 1) Ensure the General Project Info, Existing Conditions, Utility Info and applicable measure tabs have been properly completed.
- 2) Review measure list for comprehensiveness and accuracy
- 5) The energy savings on the Measure Summary tab should reflect site usage reduction. These values are converted to source energy savings by the EAST tool for evaluation of project eligibility.
- 6) Use the "Show Financial Performance Metrics >>" link in cell N4 to display measure and project-level SIR.

Measure Name	Measure Category	Measure Classification	Cost	Annual SITE Energy Savings		
				Heating MMBtu	Non-Heating MMBtu	Cooling kWh
TOTALS			\$179,400	0	0	2,000
Total for Improvements			\$179,400			
Participating Contractor Fees - EAST			\$0			
Participating Contractor Fees - Construction Period			\$0	Overall project management, all fees		
Construction Management Fees			\$0	Overall construction management, all fees		
1 Example Description 1		LED Fixtures & Screw-Ins	\$2,000	0	0	0
2 Example Description 2		LED Fixtures & Screw-Ins	\$2,000	0	0	0

Measure QC

- Tabulates all measures in scope and key attributes (cost, nominal savings, % savings)
- Generates automated measure-level QC flags and requires response to proceed with submittal
- Validates total end use savings against disaggregated consumption from Utility Info tab

End Use Savings Check				Comment
End Use	Pre-Construction Energy Consumption (MMBtu)	Projected Site Savings (MMBtu)	Projected % Savings	
Heating	0.0	0.0	#DIV/0!	Baseline energy usage or critical measure data missing. Please review cells B22:F45 on the Utility Info tab to ensure baseline energy usage data is transferred correctly and review the Measure Summary tab for any erroneous values.
Cooling	0.0	0.0	#DIV/0!	Baseline energy usage or critical measure data missing. Please review cells B22:F45 on the Utility Info tab to ensure baseline energy usage data is transferred correctly and review the Measure Summary tab for any erroneous values.
Baseload	0.0	0.0	#DIV/0!	Baseline energy usage or critical measure data missing. Please review cells B22:F45 on the Utility Info tab to ensure baseline energy usage data is transferred correctly and review the Measure Summary tab for any erroneous values.

QC Check

- Leverages upstream inputs and calculations to perform project-level QC check
- Generates automated QC flags and requires review and resolution to proceed with submittal
- Color-coded to call attention to critical issues

Project Quality Control Check	
Instructions	
1) Once all project data has been entered, review the items below to ensure the project meets the specified criteria. 2) Comments highlighted in green indicate that the project passes the corresponding check. Yellow highlighted comments require additional review. Red highlighted comments indicate that the project requires revision in order to meet minimum quality control standards.	
QC Check Type	Comment
Measure Quantity Check	OK - All measure quantities entered.
Measure Unit Check	OK - All measure units entered.
Measure Lives Check	OK - All measure lives entered.
Baseline Year of Manufacture Check	OK – Baseline years of manufacture entered as required.
Measure QC Check	OK - Responses provided on Measure QC tab.
Critical Inputs Check	Error - One or more critical input fields have been left blank - please review the following tabs of this workbook and enter relevant data into all orange highlighted cells: General Project Info; Utility Info; Measure Summary


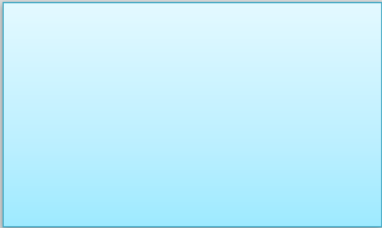
QC Feedback

- Used by NYSERDA Reviewer and Participating Contractor to conduct project technical, financial, and program compliance review and communicate comments and responses
- Primary reference tab for addressing issues in project resubmittals
- Includes scoring mechanism to record REVO submittal completeness and accuracy

NYSERDA's Multifamily Residential Energy Pathways QC Review Feedback Form		
Project Name		
Participating Contractor		
Participating Contractor's Auditor		
NYSERDA Review By		
Reviewer's Phone		
Review Date & Revision #		
Draft EAST Date & Revision #		
General Comments		
	Reviewer Comments (Rev0)	Participating Contractor Comments (Rev0)
Has all required documentation been submitted? EAST; Provider Contract; DRAFTs; Photos.		
Measure Description Tab: Do selected Measure Categories/Classifications correctly reflect the measures?		
Measure Summary Tab: Have any included water and O&M savings been justified appropriately?		
Have all orange "critical input" cells been completed?		

- Upon completion of EAST, Project Summary presents a high-level overview of expected project performance

Project Summary

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
Project Summary															
This worksheet displays key information, metrics and graphics relevant to the site and project. Projected Percent Site Energy Savings and Projected Total Source EUI are provided in cells D28 and D30, respectively.															
PROJECT DETAILS															
Project Name <input type="text"/> City <input type="text" value="test"/> Year Built <input type="text"/> Floor Area (sq. ft.) <input type="text" value="6000"/> Residential Units (#) <input type="text" value="10"/>															
<u>Projected Energy Savings</u>			<u>Pre-Retrofit Energy Use</u>				<u>Pre-Retrofit Energy Cost</u>								
Total Site Savings (MMBtu) <input type="text" value="0"/>			Total Site Usage (MMBtu) <input type="text" value="0"/>				Total Cost <input type="text" value="\$0"/>								
GHG Intensity Index (tCO ₂ e/SF) <input type="text" value="0.000"/>			GHG Intensity Index (tCO ₂ e/SF) <input type="text" value="0.000"/>												
<u>Site Energy Savings(%)</u> <input type="text" value="0%"/>															
<u>Total Source EUI (kBtu/sqft)</u> <input type="text" value="0"/>															



Salesforce Data Export

- Hidden module containing provisions for mapping project and measure-level data for export
- Contains field labeling, sequence, data type, etc. requirements and mapping logic to generate export data files compatible with program back-end tracking / reporting system (Salesforce)
- Accessible to NYSERDA project manager / reviewer only



Live Tool Walkthrough



Q&A



Wrap-Up & Next Steps

■ Draft EAST Distribution

- Email to attendees and others by request
- ETA: Monday, December 29, 2025 (pending final measure list and program approval)

■ Stakeholder Feedback

- Form for comment submittal distributed with draft EAST
- Request for comments by COB Friday, January 16, 2026
- Feedback to be addressed for program launch

■ Program Launch

- ETA: End of January
- Final EAST will be available on program website for launch

■ Additional Program / EAST Training

- Schedule TBD based on final program launch date and need



Questions?



Email Us:

multifamilyprograms@nyserda.ny.gov



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