

Regional Clean Energy Hubs Market Evaluation and Customer Survey Baseline Update (2023-2024) EXECUTIVE SUMMARY

Final Report

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Executive Summary

The New York State Energy Research and Development Authority (NYSERDA) Regional Clean Energy Hubs (RCEH) program leverages a network of twelve Regional Clean Energy Hubs (Hubs) to provide essential outreach, education, support, and referral services to individuals and organizations in disadvantaged communities (DACs) across NYS. Individual Hubs serve as a locus in each Region to educate residents and businesses about NYSEDA program offerings and other funding sources (e.g., utility and other state agency programs), and to increase participation in the clean energy economy. In each Hub, a prime contractor works closely with a small network of subcontractors and a larger network of local partners to support customers under this NYSEDA program.

This evaluation builds on the RCEH market baseline study, which focused on the initial launch and first year of activity for the program (September 1, 2022 to July 31, 2023).¹ This update to the baseline assesses efforts to educate customers about clean energy opportunities, identify barriers to customer participation, and measure changes in these conditions since the baseline study period. Primary data collection took place between May 2025 and February 2026, during which the Evaluation Contractor gathered consumer awareness data from residents in disadvantaged communities, along with perceptions data from Hub leadership teams, subcontractors, and partners. The Evaluation Contractor collected primary data from Hub leadership team interviews (12 interviews, 28 participants), subcontractor focus groups (3 groups, 24 participants), partner organization focus groups (4 groups, 29 participants), consumer focus groups (5 groups, 50 participants), and a consumer survey (286 respondents). Secondary data sources for this evaluation (focused on the period between September 1, 2023, to August 31, 2024, approximately one year after the baseline study) included the Hub Membership List; Opportunities data; Monthly Engagement Reports; Regional Assessment and Barriers Analysis (RABAs); and Outreach and Equitable Engagement Plans (OEEPs).

Findings from this study showed that **Hubs have made substantial progress since the baseline evaluation period in their efforts to build networks of partner organizations and deliver on outreach and engagement commitments.** Hubs are pursuing community campaigns, pilot projects, and more with support from the broad networks of regional partners that they have established. In addition to the 12 Hub organizations, the program includes 61 subcontractors and more than 1,100 partner organizations supporting RCEH program implementation across NYS. Some of the Hubs' most common partner types include housing providers and general community services organizations (247 total),

¹ <https://www.nyserda.ny.gov/-/media/Project/Nyserda/Files/Publications/PPSER/Program-Evaluation/Matter-No1602180NYSEDARegional-Clean-Energy-Hubs-ImpactReportSeptember-2024.pdf>

environmental/climate issues and clean energy organizations (103 total), and local government agencies or organizations (86 total).

As Hubs have made substantial progress in outreach and building the network of partners to support RCEH work, they have also been confronted with the challenge of navigating and communicating mid-cycle changes of NYSERDA programs to Hub subcontractors and partners. **Changes to NYSERDA programs (e.g., changes to the EmPower+ application processes) affect the *entire* RCEH network, and the onus falls primarily on NYSERDA Hub staff to relay changes to their networks of partners.** Additional lead time in notifying Hub leaders of changes to programs may reduce some friction between Hubs and the various partners with whom they communicate and collaborate.

The role of Hub staff has also expanded to meet customer needs in real time. **Hub staff are playing an emergent customer advocacy role in technical discussions between customers and contractors regarding project scope and budget.** Hub staff described this new role as stepping in to explain available options, coordinating with contractors regarding the scope of home energy updates and wraparound funding for the customer, and generally acting as an expert resource and advisor. Existing implementation challenges such as high rates of staff turnover and a full Hub workload constrain the bandwidth of Hub staff to embrace this emerging customer advocacy role.

This evaluation also reports no substantial changes to general consumer awareness of clean energy concepts and technologies or programs since the baseline study period. **Consistent with the baseline study, most survey respondents were aware of energy efficiency and renewable energy generation and storage concepts.** The survey also asked consumers about their experience with energy audits. **Most survey respondents indicated that they had *not* received an energy audit, though most *had* installed clean energy or energy efficiency measures in their homes at one time or another.**

Consistent with the baseline findings, interviews and focus group discussions with Hub leaders and subcontractors indicated that EmPower+ (a NYSERDA program) and the Home Energy Assistance Program (HEAP, offered by the NYS Office of Temporary and Disability Assistance) are the programs to which Hubs generate the most frequent referrals for income-qualifying individuals. EmPower+ and HEAP have complementary requirements and applications, where eligibility for one program can function as proof of eligibility to participate in the other. Both programs provide support for families in need of emergency heating assistance. **Aligned with program referral patterns reported by Hub staff, HEAP and EmPower+ were also among the top programs in which consumer survey respondents reported having participated.**

Reported barriers to clean energy adoption in households within DACs remain consistent with findings from the baseline study: **survey responses indicate that other higher priorities for household spending and additional information needs prevent consumers from pursuing purchase of clean energy products and seeking assistance from clean energy service programs. Consumers also expressed uncertainty and even skepticism about whether the benefits related to clean energy products outweigh the high upfront cost of installation (including with incentives).** This finding is consistent with the Hubs' Regional Assessment and Barriers Analysis (RABA) reports, which highlighted how customers can have overly high expectations for energy savings and may feel misled when actual energy savings are realized at a lower level than expected when it comes to clean energy projects.

Concerns about scams and organizational bias affect consumer confidence in information provided by organizations perceived to have an agenda. With skepticism about information regarding benefits relating to clean energy, **consumers identified NYSERDA as an important and trusted source of information about clean energy programs, followed by other state organizations and utility/electricity/fuel providers.**

Findings and recommendations based on these results are presented in the main report and summarized in **Table E1.**

Table E1. Findings and Recommendations from the Evaluation

Finding	Recommendation	NYSERDA Response
1. Though the Hubs' network is extensive, growing, and successfully supporting a wide range of activities as intended, Hub teams report a persistent tension between their responsibilities to balance the "depth" versus "breadth" of services offered in their efforts to meet customer needs.	1. NYSERDA should create additional self-service resources on NYSERDA's website, and develop/fund a small residential homeowner representative program, analogous to the existing multi-family building owner representative program, to support customers directly in navigating discussions with contractors and planning engineers.	Pending. NYSERDA is in the process of developing the MyEnergy platform, which is meant to be a self-service portal for customers to identify, based on their priorities and interest, what programs they are eligible for and get information on who to reach out to at NYSERDA for assistance. The request to develop a single-family homeowner representative services program can be elevated to the Energy Equity Collaborative to allow for coordinated engagement and collaboration with historically marginalized communities around program planning and policy development.
2. Hubs are responsive to NYSERDA's mid-stream changes to highly used programs, such as EmPower+, but communicating program changes is a challenge for Hub staff as they work to build trust within their networks and communities.	2. NYSERDA programs that affect Hub operations should notify Hubs in advance, and directly inform affected customers already in NYSERDA's pipeline who are expecting to meet certain eligibility requirements or see certain outcomes.	Pending. Currently, to communicate program changes, NYSERDA's Home Modernization Team (HMT) participates in Office Hours with the Hubs and provides monthly emails outlining upcoming changes. These HMT Office Hours provide a space for Hubs to share program feedback, receive responses on HMT programs and program updates. While Hubs will still provide localized support for applicants, they are provided with NYSERDA messaging to streamline their response efforts and customer support information to specific programs.
3. DAC consumers are broadly aware of energy efficiency and renewable energy concepts, and consider NYSERDA a trusted source of information; however, awareness of Hub activities remains low, and consumers reported feeling both overwhelmed by the amount of information on clean energy opportunities and skeptical about the expected benefits, particularly given the context of rising electricity prices.	3. NYSERDA should allocate resources to develop better introduction-level messaging about clean energy concepts and key programs on the RCEH landing page, along with case studies highlighting non-energy benefits.	Pending. Developing introductory-level multimedia, transparent cost-benefit matrices, and localized case studies is critical to empowering self-service consumers, building market confidence, and mitigating key barriers within Disadvantaged Communities (DACs). NYSERDA will provide this recommendation to the NYSERDA Marketing and Communications Team for further exploration, and engage with them to provide support on the development of such resources if approved.