

# Statewide LMI Portfolio Stakeholder Webinar

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

Presented by the New York Utilities and NYSERDA

November 17, 2021



# Agenda

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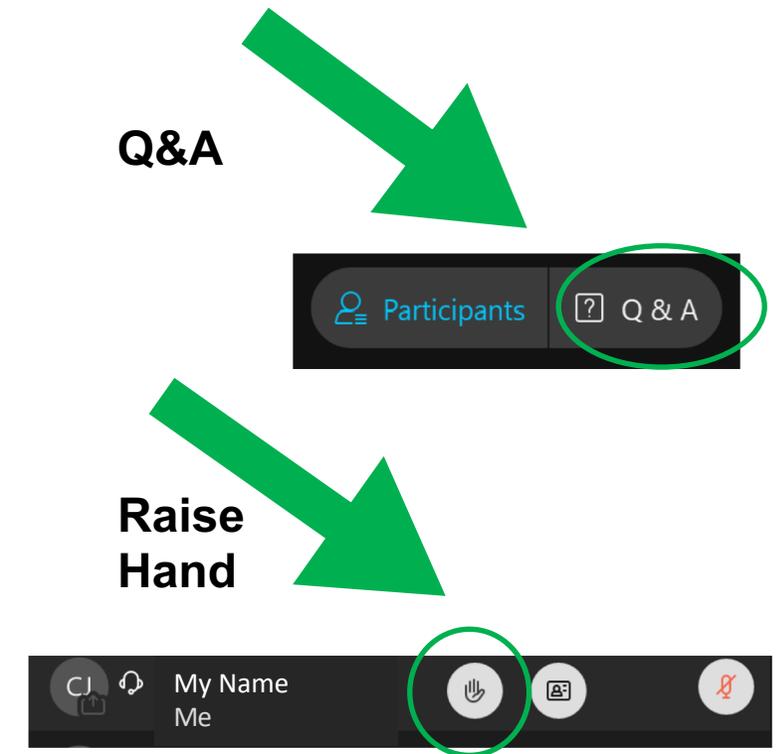
- Welcome – Meeting Procedures
- Context
- Overview of Initiatives and Services: Objectives and Progress to Date
- Affordable Multifamily Energy Efficiency Program
- 1-4 Family Homes
- NY Energy Advisor
- Community Based Approaches
- Stakeholder Engagement
- Next Steps
- Additional Questions and Comments

# Meeting Procedures

## Before beginning, a few reminders:

### > All attendees will be muted

- > For questions or comments throughout, please use either the Raise Hand or Q&A functions:
  1. Open your participant panel using the oval icon in the bottom right of your WebEx screen.
  2. Hover your mouse over your name in the Participants list in order to see the “Raise Hand” icon, found just below and to the right of your name.
  3. Click on the raise hand icon to indicate you have a question.
  4. When the moderator calls on you and indicates you are unmuted, you may ask your question verbally.
  5. When you are finished talking, please select the “Raise Hand” icon again to lower your hand.
- > Note: The Q&A function is private and the team will share public responses as appropriate
- > Slides and a summary report of the Webinar, with Q&As, will be posted after the meeting. This meeting will be recorded, and the recording will be available upon request to [LMIForum@nyserda.ny.gov](mailto:LMIForum@nyserda.ny.gov).
- > If technical issues arise, please contact Mike Armbruster @ (518) 862-1090 ext. 3409.





# Context

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# Context

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- Over 40% of New York's households are characterized as Low- to Moderate-Income (LMI)
  - 2.3 million low-income (at or below 60% of the state median income)
  - 1.2 million moderate-income (between 60% of the state median income and 80% of the area median income)
  - Energy bills have a disproportionate impact on lower-income households
- Primary barriers to clean energy improvements beyond capital constraints include:
  - Lack of information on available programs and opportunities to improve efficiency
  - Structural deficiencies
  - Split incentives

## **Our Objective**

*Create a statewide framework that promotes the advancement of energy affordability and access to energy efficiency across New York State*



# Statewide LMI Portfolio

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## Where we started ....

LMI programs run separately by each utility and NYSERDA across the state, with minimal collaboration and different service offerings.

## Achievement to date and continuing progress towards....

A statewide LMI portfolio of initiative and service offerings designed to create a coordinated and holistic energy efficiency delivery system while:

- Reducing administrative costs and increasing the impact of ratepayer funding
- Providing more consistent and streamlined participation for service providers
- Improving the experience of and ultimate benefit for LMI customers seeking to access clean energy services

# Initiatives and Services: Development Process

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- Weekly LMI Joint Management Committee (JMC) meetings
  - Upcoming JMC Manual Filing, including Executive Committee
- Multiple working groups created to address specific initiatives:
  - Affordable Multifamily
  - 1-4 Family Homes
  - Stakeholder Engagement
  - NY Energy Advisor/ Marketing
  - Clean Heat Coordination
  - EM&V
- Other areas of coordination: data sharing, implementation contractors



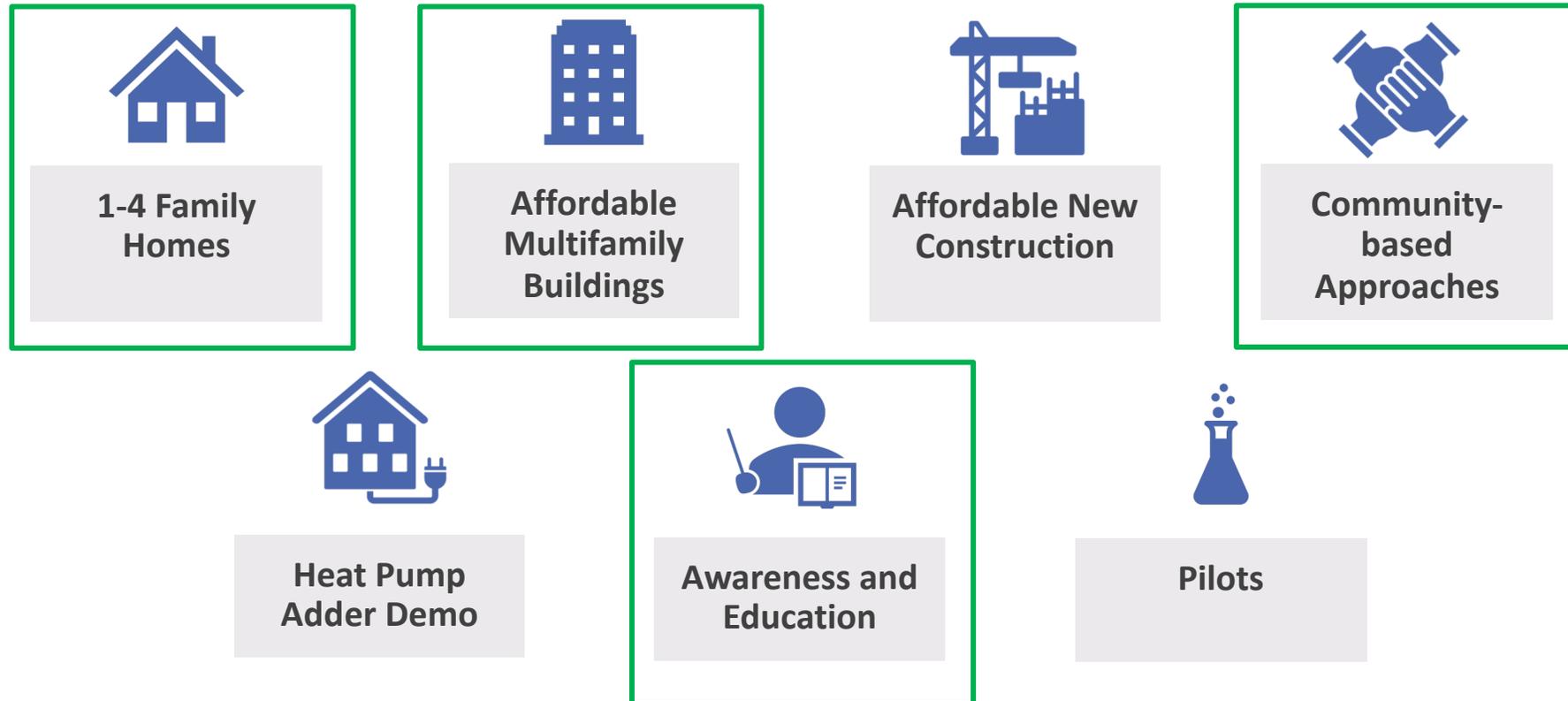
# Overview of Initiatives and Services: Objectives and Progress to Date

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# Summary of Initiatives and Services

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



# 2020 Statewide Initiative Review<sup>+</sup>

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## 1-4 Family Homes

- 12,869 projects
- \$54 million total expenditures
- 4,400 gross annual MWh savings
- 226,000 gross annual MMBtu savings



## Affordable Multifamily

- 4,811 projects\*
- \$18 million total expenditures
- 12,500 gross annual MWh savings
- 102,800 gross annual MMBtu savings



## Affordable New Construction

- 294 projects
- \$2.1 million total expenditures
- 300 gross annual MWh savings
- 3,000 gross annual MMBtu savings

+Data from Annual Report filed April 1, 2021. Annual Report for 2021 will be filed April 1, 2022.

\*In some cases, Program Administrators defined program participants in multifamily initiatives differently in 2020. The definition and calculation of total multifamily participants will be aligned as the Program Administrators implement the new statewide offering.



# Affordable Multifamily Energy Efficiency Program

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# Affordable Multifamily Buildings - Overview



## Objectives

- Transition to a statewide affordable multifamily program
- 40% of incremental energy efficiency utility funds directed to affordable multifamily

## Features

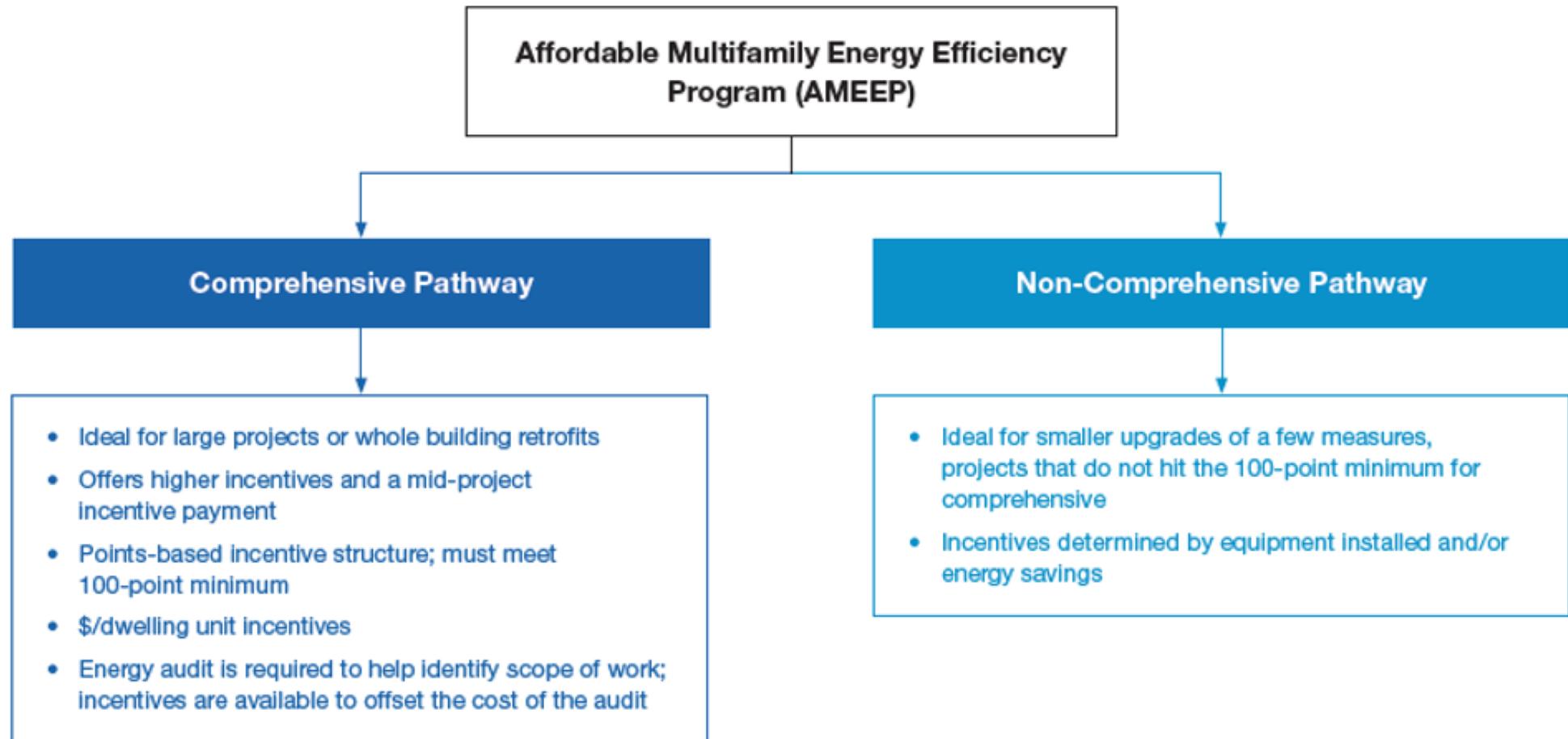
The new statewide program:

- Offers customers the flexibility to pursue prescriptive or custom measures, direct install, and/or comprehensive projects
- Provides a robust incentive to encourage adoption of comprehensive projects
- Offers technical assistance
- Delivers a streamlined and consistent customer journey

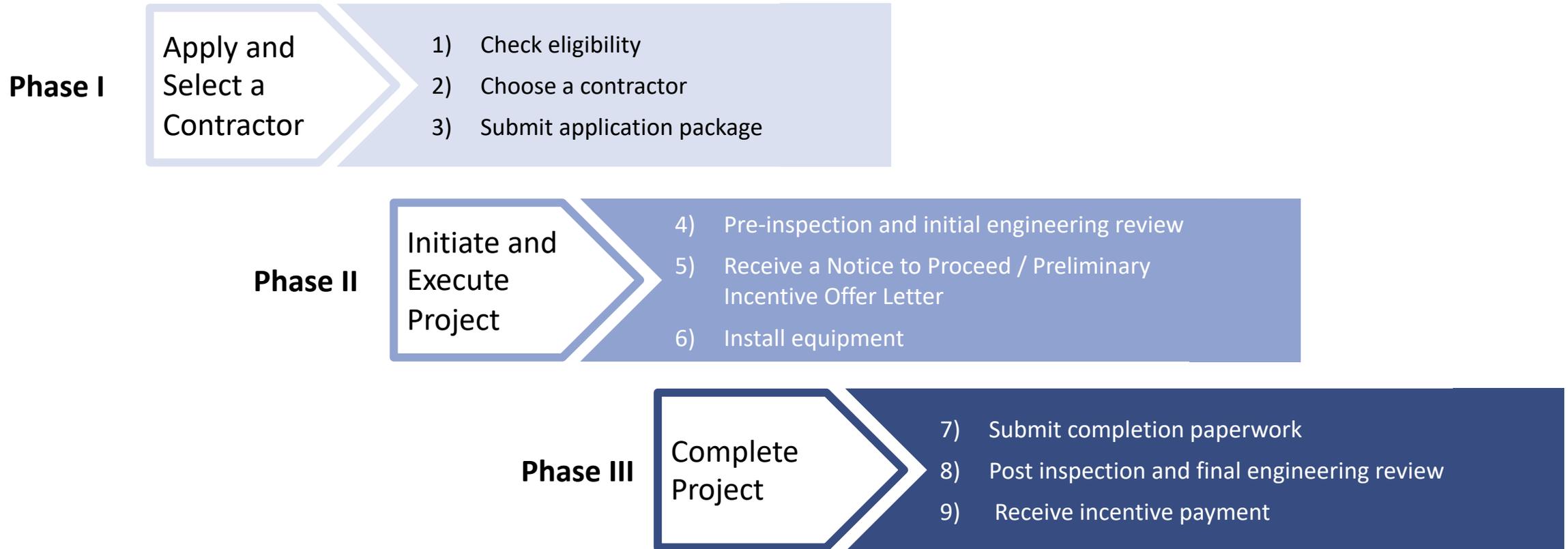
## Timeline

- Released to market on November 3, 2021
- NYS Clean Heat coordination phased into program in January 2022

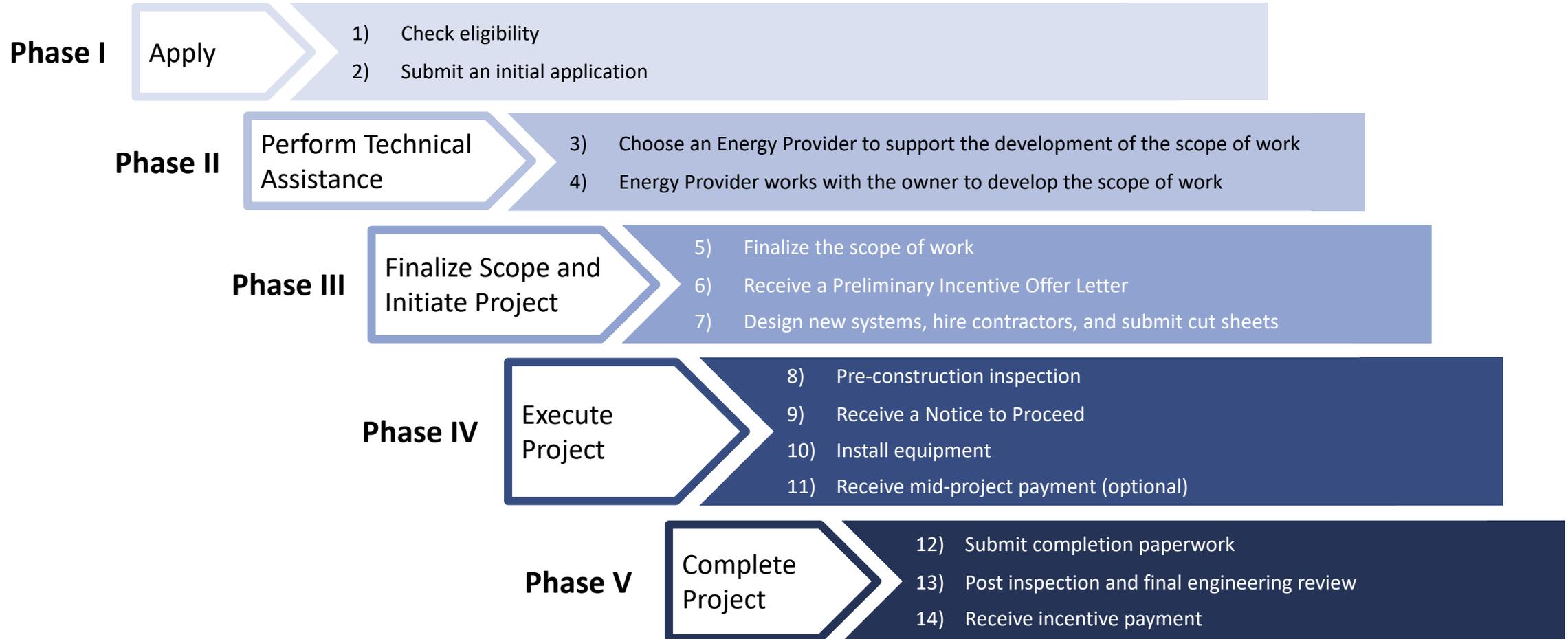
# Program Overview



# Non-Comprehensive Program Process



# Affordable Multifamily Buildings Comprehensive Program Process



# Comprehensive Pathway – NYSERDA and Utility Roles



## NYSERDA

- Manage and provide payment for technical assistance energy audits
- Manage energy service provider network

## Utility

- Manage and provide payment for LMI Multifamily incentive offerings
- Main point of contact for the customer
  - Back-end conduit between incentive offering and technical assistance
- Manage participating contractor network

# Comprehensive Pathway – Incentive Structure



## Comprehensive Pathway Point Allocation per Measure

Common measures shown below. For more measures, see Program Manual

40 Points Per Measure	30 Points Per Measure	20 Points Per Measure	10 Points Per Measure	5 Points Per Measure
<ul style="list-style-type: none"> <li>Window replacement</li> <li>Insulation (roof)</li> <li>Insulation (wall)</li> <li>Boiler replacement</li> </ul>	<ul style="list-style-type: none"> <li>Domestic hot water heater replacements</li> </ul>	<ul style="list-style-type: none"> <li>Energy management system (EMS)</li> <li>Hot water and steam pipe insulation</li> <li>Central cooling</li> <li>Elevators</li> <li>Ventilation such as energy recovery ventilators</li> </ul>	<ul style="list-style-type: none"> <li>Air sealing</li> <li>Orifice plates</li> <li>Steam traps</li> <li>Thermostatic Radiator Valves (TRVs)</li> <li>HVAC electric controls (BMS, thermostats)</li> <li>Motors and drives</li> </ul>	<ul style="list-style-type: none"> <li>Boiler clean &amp; tune</li> <li>Common area lighting</li> <li>In-unit direct install measures such as faucet aerators, showerheads, LEDs</li> <li>Appliances (stoves, refrigerators, washer/dryers, dishwashers)</li> </ul>

## Comprehensive Pathway Incentive Rates

Comprehensive Pathway Incentive			
Tier	Minimum Points	Downstate Incentive (\$/Dwelling Unit)	Upstate Incentive (\$/Dwelling Unit)
1	100	\$1,500	\$900
2	150	\$2,000	\$1,200

# Comprehensive Program Pathways



Program Pathway Examples						
Building	# Dwelling Units	Scope of Work (Points)	Total points	Pathway	Tier	Total Incentives
1	125	Boiler replacement (40) EMS (20) Pipe insulation (20) Air sealing (10) Common area lighting (5) In-unit lighting (5)	100	Comprehensive	1	Downstate: \$187,500  Upstate: \$112,500
2	200	Window replacement (40) Roof insulation (40) Domestic hot water heater replacement (30) Pipe insulation (20) Air sealing (10) Common area lighting (5) In-unit lighting (5)	150	Comprehensive	2	Downstate: \$400,000  Upstate: \$240,000
3	25	EMS (20) Common area lighting (5) In-unit lighting (5)	30	Non-Comprehensive	N/A	Varies by downstate and upstate NY, refer to website/factsheets

# Comprehensive Offering – Technical Assistance



**Technical Assistance:** Funding for building energy audits that identify energy efficiency opportunities and develop an initial scope of work will be provided through NYSERDA’s FlexTech program.

Level of Audit Required	Other Types of Audits Supported	Level of Audit Cost Covered
ASHRAE Level I +	<ul style="list-style-type: none"><li>• ASHRAE Level II</li><li>• IPNA</li><li>• Audits meeting current MPP requirements</li></ul>	<ul style="list-style-type: none"><li>• 50% of audit cost paid at audit completion</li><li>• Additional 25% of audit when the building moves forward with a comprehensive retrofit project with their utility</li><li>• Customer covers remaining costs of audit</li></ul>

## Affordable Multifamily Buildings

# Additional Resources

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To submit an interest form:

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

For additional program resources, such as the program manual and application forms, visit your utility's website:

- Central Hudson: <http://centralhudson.com/multifamily-ee-program>
- Con Ed: <https://conEd.com/AffordableHousing>
- National Fuel: <http://www.nationalfuel.com/utility/affordable-multifamily-energy-efficiency-program>
- National Grid LI: <http://ngrid.com/li-ameep>
- National Grid Metro: <http://ngrid.com/dny-ameep>
- National Grid Niagara Mohawk: <http://ngrid.com/uny-ameep>
- NYSEG: <http://nyseg.com/AffordableMultifamily>
- O&R: [oru.com/affordablemultifamily/](http://oru.com/affordablemultifamily/) (This new Affordable Multifamily Program link will be “live” Nov. 18)
- RGE: <http://rge.com/AffordableMultifamily>



# 1-4 Family Homes

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# 1-4 Family Homes Programs



## Objectives

- Improve overall energy affordability for LMI households
- Increase the number of LMI households receiving energy efficiency services
- Address health and safety issues as part of energy efficiency work scopes

## Features

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

## Timeline

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

# 1-4 Family Homes EmPower+



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

## Progress to date

- Finalized details of plan to merge EmPower and Assisted Home Performance to form EmPower +
- Alignment ongoing with HEAT and PSEG programs (on Long Island)
- Finalized graduated incentive scale
- Direct install for moderate-income households
- Online application completed

## Upcoming

- Discussions to improve targeting customer referrals by Utilities and community groups
- Utilities/NYSERDA coordinate funding for EmPower – Fall 2021, Expected EmPower + launch in 2023

1-4 Family Homes

# EmPower/EmPower+ Highlights

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- Features launched July 2021
  - Single audit/incentive application
  - Customer contractor choice
  - Online application
  - Incorporation of geographic eligibility
  
- Features launching Q1 2022
  - Direct install during audit for all income levels
  - Unified measures across income tiers
  - Making homes heat pump ready
  - Project level cost effectiveness screening for project approval

## 1-4 Family Homes

# EmPower+ launch schedule

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- Due to the unexpected long-term unavailability of NYSERDA's software vendor, NYSERDA has adjusted its expected timelines and shifted to phased roll-out of EmPower+ program aspects.
- Utilities and NYSERDA are signing MOUs for the funding of EmPower in Fall of 2021.
- Program enhancements on the previous slide are underway.
- NYSERDA is developing an RFP for a new workflow with the RFP to launch in Fall of 2021 and the new workflow to be functional by mid-2023.
- The new workflow will include a 4 Tier incentive level with stepped incentives for income levels up to 100% AMI and include all the features developed through the NENY proceeding.

# Beneficial Electrification

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- Energy affordability is the main program priority.
- NYSERDA and the Utilities are investigating how to scale adoption of heat pumps in a variety of ways including pilots and subsidies.
- NYSERDA has conducted an LMI pilot for single family and multifamily homes and is looking to identify additional pilot opportunities.
- Preliminary learnings show that, for single family homes, over 85% of homes need additional insulation, panel box work, an/or distribution improvements to be ready for heat pumps to work efficiently.



# NY Energy Advisor

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# NY Energy Advisor



[ABOUT US](#) [RESOURCES](#) [CONTACT US](#)

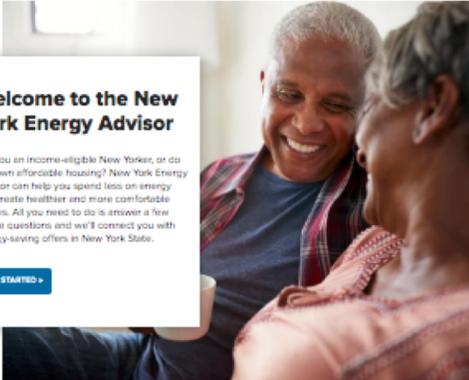
## Welcome to the New York Energy Advisor

Are you an income-eligible New Yorker, or do you own affordable housing? New York Energy Advisor can help you spend less on energy and create healthier and more comfortable spaces. All you need to do is answer a few simple questions and we'll connect you with energy-saving offers in New York State.

[GET STARTED >](#)

Programs and resources for income-eligible residential customers and affordable multifamily property owners.

# NY Energy Advisor - Homepage



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[GET STARTED >](#)



**About New York Energy Advisor**

New York Energy Advisor connects income-eligible New Yorkers with a customized list of energy-related assistance in the State. Sponsored by NYSERDA and utilities, qualified New Yorkers can get help paying utility bills, receive special offers on heating assistance, and more.

[LEARN MORE](#)



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[LEARN MORE](#)



**About NYSERDA**

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[New York State Electric and Gas \(NYSEG\)](#)  
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[Rochester Gas & Electric](#)

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# NY Energy Advisor - Survey



## Find Your Energy Savings

Start Finish

**Which best describes you?**  
Select one.

**NEXT ▶**



## Find Your Energy Savings

Start Finish

**How do you heat your home?**  
Select one.

**BACK** **NEXT ▶**

**ENERGY SAVER TIP**

Heating makes up half the energy bill in most U.S. homes, making it the largest energy expense for most of us. With heating system upgrades, you'll lower your monthly bills and create a comfortable, healthier home.

# NY Energy Advisor - Survey



## Find Your Energy Savings

Start Finish

How many people live in your household?

[BACK](#) [NEXT ▶](#)



## Find Your Energy Savings

Start Finish

What is the total MONTHLY income of your household?

[? WHY DO WE ASK?](#)

Please remember to enter your monthly (not yearly) income.

[BACK](#) [NEXT ▶](#)

### 💡 CALCULATING TOTAL MONTHLY HOUSEHOLD INCOME

Your gross monthly income is how much you take home before taxes. If you are a salaried worker, your gross income per month is your annual salary divided by 12.

If you're paid hourly, multiply your hourly wage by how many hours a week you work, then multiply this number by 52. Divide that number by 12 to get your gross monthly income.

# NY Energy Advisor – Results



NEW YORK STATE OF OPPORTUNITY | NY Energy Advisor

ABOUT US | RESOURCES | CONTACT US

## Recommended Energy Savings Programs

START OVER | BOOKMARK IT | COPY TO CLIPBOARD

show me:

Based on your answers, you qualify for the following programs.

### EMPOWER NY

Receive a no-cost home energy assessment and discover ways to save money. You may qualify for free energy-saving improvements and products, like insulation and air sealing upgrades, energy efficient light bulbs, replacement of an inefficient refrigerator and freezer, and more.

### THE GOOD NEIGHBOR FUND

The Good Neighbor Fund provides "last resort" grants to help pay the energy bills of Central Hudson customers in need and who have exhausted all other forms of public and private utility assistance

amounts are determined based on your fuel type and the amount you receive through HEAP.

LEARN MORE

are also available if you are in danger of running out of fuel or having your utility service shut off.

LEARN MORE

### SOLAR FOR ALL

Save up to \$180 annually on your electricity bills by accessing clean energy through community solar farms. Solar for All is a free program with no sign-up costs or monthly fees. Monthly bill credits will save you on average \$5-15 a month—and you can cancel anytime without penalty.

LEARN MORE | APPLY NOW

### COMMUNITY ENERGY ENGAGEMENT PROGRAM (CEEP)

Work directly with a Community Energy Advisor at no-cost and discover ways to lower your energy costs, identify financing options for energy-saving upgrades in your home, access low-cost clean energy, and more.

LEARN MORE

### BUDGET BILLING

Budget easily and avoid seasonal fluctuations to your energy bills caused by hot or cold weather extremes—budget billing spreads bill payments evenly over 12 months based on your usage history.

LEARN MORE

### EXTRA SECURITY PLAN

Extends the billing due-date for customers on a fixed income and customers who receive Social Security income, disability benefits or survivor benefits as their only source of household income.

LEARN MORE | APPLY NOW

# NY Energy Advisor – Additional Pages



## About Us

NY Energy Advisor makes energy savings more accessible to all New Yorkers. We provide income-eligible families and owners of affordable housing with a customized list of energy programs and services in New York State, like:

- Help paying monthly energy and fuel bills
- A free home visit with an energy professional to help you identify available energy-savings opportunities
- No-cost, clean energy offerings—like solar

If you have any questions about NY Energy Advisor or program qualifications, please [contact us](#).



NY Energy Advisor is sponsored by the [New York State Energy Research & Development Authority \(NYSERDA\)](#) and the following utilities:

- [Central Hudson Gas & Electric](#)
- [Consolidated Edison \(Con Edison\)](#)
- [National Fuel Gas](#)
- [National Grid](#)
- [New York State Electric and Gas \(NYSEG\)](#)
- [Orange & Rockland](#)

## Resources

In addition to energy assistance, there are many programs and services available to help income-eligible families and individuals. Get the help you need by exploring available federal and state offerings below—including insurance plans for children, discounts on phone service, food assistance, and more.

### Advance Child Tax Credit Payments in 2021

Qualifying families are eligible to receive advanced, monthly Child Tax Credit payments. Beginning July 15, the IRS will pay half the total credit amount in monthly payments. You will claim the other half when you file your 2021 income tax return.

[LEARN MORE](#)

### Child Health Plus

Depending on your family's income, your child may be eligible to receive Children's Medicaid or Child Health Plus—free or low-cost health insurance to New York children under the age of 19.

### Temporary Assistance for Needy Families — Family Assistance (FA)

FA provides cash assistance to eligible families that include a minor child living with a parent (including families where both parents are in the household) or a caretaker relative.

[LEARN MORE](#)

### Temporary Assistance for Needy Families — Safety Net Assistance (SNA)

SNA provides cash assistance to eligible families who

## Contact Us

Who would you like to contact?

The contact information will be changed upon selecting a name.

SELECT A NAME:

Central Hudson Gas and Electric

### Central Hudson Gas and Electric

**WEBSITE**  
<https://www.cenhud.com/>

**PHONE**  
1-845-452-2700

**ADDRESS**  
284 South Ave.  
Poughkeepsie, NY 12601



# Community- Based Approaches

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# Community-Based Approaches



## Objectives

- Expand the reach of Utilities and NYSERDA to engage customers “where they are”
- Increase the number of LMI households served
- Connect LMI households with other relevant programs/services
- Identify community-based partners

## Features

- Partnership with community-based organizations to conduct local outreach and education (e.g., NYSERDA Clean Energy Engagement Program- CEEP)
- Delivering of energy efficiency products (e.g., LEDs) through community institutions such as food banks
- Working with local housing and weatherization providers to coordinate services and provide incentives to projects

## Timeline

- 2021 - continuation of existing programs, focusing on identifying and building partnerships

## Community-Based Approaches

# Regional Clean Energy Hubs

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- CEEP contracts in good standing will be extended until June 30, 2022
- NYSERDA will build on previous outreach and engagement initiatives such as CEEP to build capacity within communities
  - Focus on hard to reach, underserved rural, and otherwise disadvantaged communities
  - One Hub in each of the ten economic development regions across the state
  - Assist communities and residents with accessing clean energy programs
  - Connect residents and small businesses with workforce and business development resources
  - Improve engagement and advance the voice and perspectives of communities in program development and policy making through stakeholder sessions
  - Address local needs and work to overcome barriers to adoption of clean energy solutions

# Regional Clean Energy Hubs: Contracting Process

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## Step 1

- Posted web-based Clearinghouse the week of May 31, 2021, for organizations to sign up and identify their interest in partnering with others on a proposal

## Step 2

- Regional Clean Energy Hubs RFP launched September 23, 2021
- Up to \$41 million will initially be available to fund the Hubs for four years

## Step 3

- Submit Statement of Interest Form by December 31, 2021
- Proposals due January 19, 2022

**Target launch of Regional Clean Energy Hubs: Q2 2022**



# Stakeholder Engagement

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# Stakeholder Engagement

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## Pre-Meeting

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

## Post-Meeting

- Meeting Feedback Survey to be circulated shortly following today's Webinar
- Within four weeks of meeting:
  - Presentation posted to DMM
  - Questions and responses posted to DMM

## Upcoming

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

# Stakeholder Engagement

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- Stakeholder input will be sought throughout initiatives and services design and calibration process
- Two stakeholder meetings annually to discuss the development and performance of the LMI Portfolio. Today's meeting is the second meeting this year.
- Meet with community-based organizations to develop a process for incorporating input from communities into the decisions made on the LMI Portfolio
- Feedback and questions may be directed to [LMIForum@nyserda.ny.gov](mailto:LMIForum@nyserda.ny.gov)



- **Stakeholder resource website.**
- <https://www.nyserda.ny.gov/All-Programs/Programs/Low-to-moderate-Income-Programs/LMI-Stakeholder-Resources-New-Efficiency-New-York>



# Next Steps

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# Next Steps

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- Launch modified initiatives and services in 2022 including:
  - Multifamily - including Clean Heat integration
  - 1-4 Family Homes
  - NY Energy Advisor
  - Community Based Approaches
- Filing of updated Implementation Plan – Q1 2022
- Stakeholder sessions proposed for June and November annually
- Meeting Feedback Survey to be circulated shortly following today's Webinar

# Questions and Comments



# Presenters

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- Lisa Romero, NYSERDA – [Lisa.Romero@nyserda.ny.gov](mailto:Lisa.Romero@nyserda.ny.gov)
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# Thank you

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